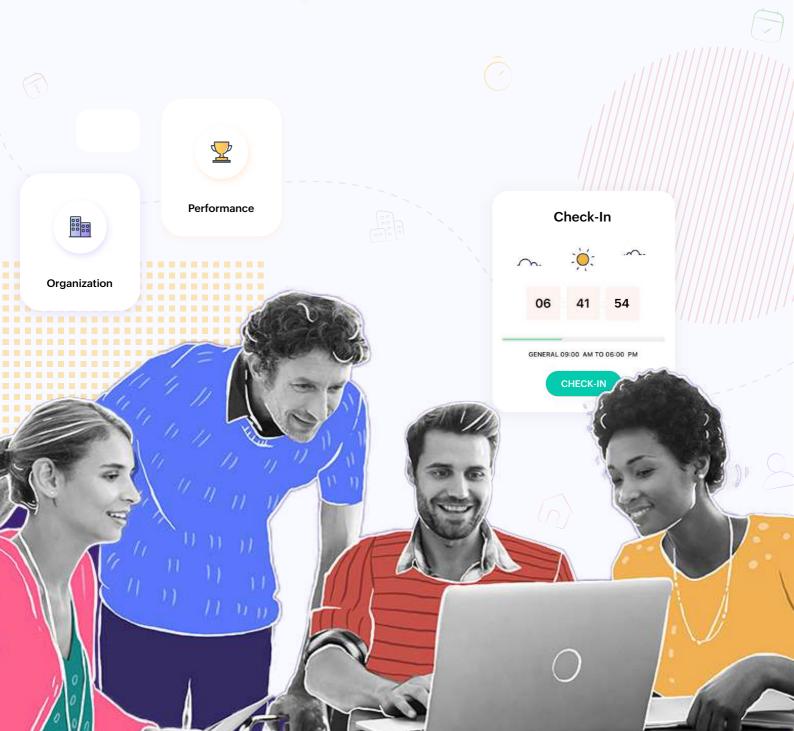




# Implementation Guide



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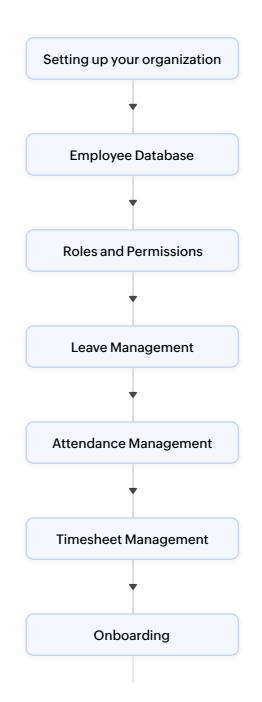


#### Welcome aboard!

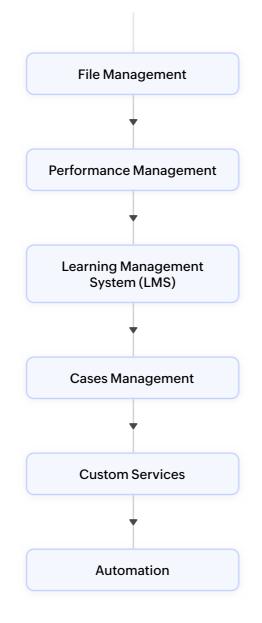
We are delighted that you have chosen Zoho People. This guide helps you on your journey as the Administrator of your Zoho People account. We will be with you every step of the way as you set up Zoho People for your organization. It will be smooth and effortless as possible.

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.









## **GETTING STARTED**

05

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.

Company information Help us setup your account	
Company Name	
* Portal Name	
* Industry	
Restaurant/Food service	~
* Mobile	
UPDATE	

**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.



## **GETTING STARTED**

Pe Pe	ople		Search Employee		Subscription 🕑 😰 🗘
		Getting Start	Company information Help us setup your account		
		Watch th		Let	's begin!
		0	* Company Name		low our recommended workflow to get rted.
			* Portal Name	0	Set up organization Configure your organization setsings.
			* Industry Restaurant/Food service	~	Invite User Invite users to their self-service portal.
			* Mobile		Configure leave policies Creata new leave types that comply with organizational policies.
			UPDATE		Define shifts Configure multiple shifts for your organization.
			ent select		Enable feed back types Select the feedback types followed in your Organization like 360 degree, peer-to-peer etc.

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

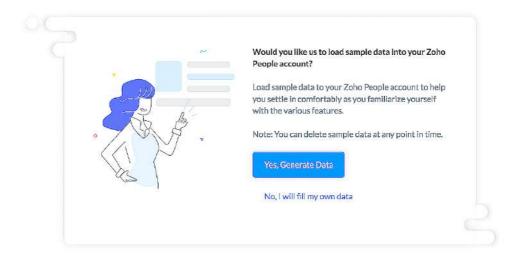
In Zoho People, new sign-ups can opt for sample data. Sample data helps administrators work with content that is similar to actual data that they would be working with at a later point. Sample data can help in providing a hands-on test experience and provides a safe way to get familiarized with the product.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

# **GETTING STARTED**



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



#### **Supported Languages**

Zoho People is offered in the following languages.

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



#### **Company Details**

08

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

- From home, go to Settings (gear icon) > Organization > Company Details > Modify Settings
- 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

🛞 People			Seproh Employee	0	Subscription 🔞 A, 🕤 🛛 🖓
ii Sthe	Company shelalls OrganizationStructure	Entity Business Unit. Sector			
Constal		Add your organization's details, define Super Administrat	or, personalise using your company logo and create other o	ompeny related settings.	
Companyability		2211 - 1705 ALW 6			
Donaire		Super Administrator			
Seconda Rebrinding		Emailitio	capaleling goyl low com		
From Addresses	Zylker	Email settings			
USP.# Organization	www.zviker.com	Default From Address	norepły-noresły@zatop	eopla.com>	
User Access Control	in Housing & Real Estate	Locale Settings			
Customization ♀	<ul> <li>L.Spalding</li> <li>19943867724</li> </ul>	Country/Region	inda		
etonata Automation	dtarless@zviker.com			100 T T T T	
A Marketphase		Time Zone	India Standard Time (Ani	n/Calcutta)	
Files Data Administration	Address Details 43455. Charles Street, Munital, India.	Display Settings			
DeveloperSpace	ta talende restrictues a contractif.	Name to be displayed	First name Last name		
		Date Format	dd-MMMA-9359		
Orboarding		Time Format	12-Hour(s)		
		Profile Photo Settings			
Cao Servica		Overver	Administrator		
Trechert		Chat Settings			
9 08		Chat	Enabled		
		Notification Settings			
		Notifications (Mail/Feeds)	Enabled		
El Com		General Settings			
		Organization Structure	Enabled		
Ø Tals		Employee Settings			
8		Dual Reporting	Enabled		
Englose Ingagement		Straama	Enabled		
A		Allow Hide Birthday Allow Hide Work Antiversary	Enabled		
Crites Readires		Alton Hide Wedding Anniversary	Bubled		
+++ Mani		Allow Hide Nobile Number	Enabled		
		Bot Settings ③			
		Bot	Enable		
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	Monty Sattings				
.=	Contraction & Contraction of Contraction				

#### **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.

III 🔗 People \$ A O D STEP 02 STEP 03 Email setti Default From A Zylker Offic E Front Offic STEP 04 STEP 05 STEP 01

#### **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**

ietep	Consump details Organization Structure	w Ertity Business-Unit Sector		Personal settings	
Second		Add your organization's details, define Super Administrator.p	espendise using your company logo and create other company related s		
	2		A	Christine Spatiang - 2Y198	•
Osnains	1001	Super Administrator		HR Head - Human Resource	48
Actione	and the second se	Small ID	aspilding@sylver.com	an Scooldregestier.com	
Fron Addresses	Zviker	Email antitings		% 1-5822620687	
Digentration	services publicat provid	Deliut Fren Address	rerepty - nerepty@sshepsople.com		
har Access Central	We Housing & Real Estates			Locale settings	
Destoreitation	L C.Suidarg	Locale Settings	Anen	P00	
	19943847724	Country/Region	tedia 👷		Eulor
National Am	<ul> <li>charledegeviller.com</li> </ul>	Time Zone	India Standard Time (Ania/Calcutta)	Courtry	- 2billa
Harlistplace	Address Details	Display Settings	E.	and the second se	
aria Administration	43455. Charles Street, Murrhal, Inclu.	Name to be disclayed	NEW STREET, ST	Tase Zone	Hole Standard Time (Asl ar Calcutta)
Inveloper Space		Bate Format	ets MMM/sysy		
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					montal Whompelian in the database of with others in your proveduation.
		Profile Photo Settings			
		Covier	C Engloyee O Administrator	if the my birthday	
		Chat Settings	0	Hide my wedding anniwersary	
		Chut	C) Divisio O Enable	er:	
		Notification Settings	9	Hide my work anniversary	
		NotPections (MultiFeeds)	O Disable O Cashie	and the second sec	
			CT ALLON		-0
		General Settings	MUSER BOOKS		
		Organization Structure	O Distrie O Exate	Theres settings	
		Employee Settlegs		Select your proferred therea and calour settings	
		Dual Reporting	C Disable O Esable	Menu Calor	100 C
		Stream Allow Hide Birthday	C Thursday O Tanada	1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.	-9
		Allow Hids Work Anniversary	O Dicable O Esable		000
		Allow Hide Wedding Anniversary	O Diverse O Enable		
		Allow Hide Mobile Number	C Dicasile O Exable	CoverImage	
		Bot Settings			
		Bet.	O Diable O Caste		and the second sec
			_		
	Monty 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- Al 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

phie		Starter Employee	Subscription 🔯 🔗 😟 💭
Setup	Create and manage domain Infor	mation of your organization.	+ Add Domain
General	Domain Name	Verification status	DKIM Details
	amrrith.tk	<ul> <li>Verified.</li> </ul>	Get
Rebranding	domtesting.com	Verify	Get
Organization	transmail.zillum.org	Verified.	Get
Users	zphone.zylker.com	Verified.	Get
Employee profiles	zylker.com	<ul> <li>Verified.</li> </ul>	Get
Departments	zylker.restaurant	Verify	Get
	zylker2.com	Verify	Get
Groups	zylker77.com	Verify	Get
	General Company details Domairs Rebranding Organization Users Employee profiles Departments Designations Locations	Setup Create and manage domain infor General Domain Name Company details Domains Rebranding transmall.zillum.org Users zphone.zylker.com Departments zylker.com Designations zylker.com Locations zylker.com	Setup         Create and manage domain information of your organization.           General         Domain Name         Verification status           Company details         amrribhtk         © Verified.           Domains         domtesting com         Verified.           Organization         transmall zillum.org         © Verified.           Users         zphone zylker.com         © Verified.           Departments         zylker.restaurant         Verify           Designations         zylker2.com         Verify           Locations         zylker2.com         Verify

#### 2. Click Add Domain

3. Enter your domain name

Domaln name	Multiention status	
zilium.business.zoho.com	Add domain name ×	
zillum.com	Domain name	
zillumin	wastelsgood.com	
zillum.org	Example: mydomain.com	
	Save Cancel	

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

Setup	Manage all the department detail	is and the departn	nent hierarchy in your organization				+ Add Department 🧃	
General								
Organization	Administration	2223	Creative		Dept of Human Resources		Engineering	
Users	admin@zylker.com	0	creative@zylker.com	6	Brown Elleen	0		9
Employee profiles	Christine Spalding							
Designations	Fire & Safety	410	Human Resources		Information Technology		Inventory	
Locations	Donna Paulsen	0		0	lt@zylker.com	0	inventory@zylker.com	0
Groups					Abigail Anderson		Allen Katie	
Delegation								
User Access Control	Legal	3460	Logistics		Marketing	2444	Media	
	legal@zylker.com	65		0	Vignesh TK	3	AditiA	0
Customization								
Automation								
Integrations	Operations		Procurement	1444	Public Relations		Quality Assurance	
Data Administration	operations@zylker.com	0		()	Anitha Joshi	0		0

3. Enter the department name

Department Name	CSR	Mail Alias	csr@zylker.com
Department Lead	Vignesh - TK 🗸		
Reporting To	Rahul J ZY107		
Photo			
Parent Department	Select v	÷	

- 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

Setup	Designations Streams						
General	Manage all the designation details in yo	urorganiza	tion.				+ Add Designation 🕴 📰 🔳
Organization							
Users	Administrative Head		CEO		Debugging & Testing		Debugging specialist
Employee profiles	Summe nover news	0	( Second)	0	Denis Bing of restrict	0	Concern & Provinsy
Departments	A	-				-	
Designations	1 million and the						
Locations	Developer		Director		Director of Customer Service	Cano.	Electrical Engineer
Groups		•		0		•	
Delegation							
User Access Control	Finance Analyst		HR Executive		HR Head		HR Manager
Customization	financeanalyst@zphone.zylker.com	2		•		O	0

#### 2. Click Add Designation

Designation Details			
Designation Name Sales Lead	Lookup 1	Select ~	
Stream	EmployeeID	200	
Mail Alias			

- 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

Setup	Create multiple locations for y	our organizat	ion and manage location details			- Add Locati	on Import 11 ::	= (
General								
Dashboard	Bangalore	5665	Bruges	5446	Busan	2000	California	844
Company details	bangalore@zylker.com	0	bruges@zylker.com	6	SOUTH KOREA	0	AMERICAN SAMOA	68
Domains	INDIA		BELGIUM					
Rebranding								
Organization	Chennai		London	1717	Mumbai	1772	New York	
Users	INDIA	0	UNITED KINGDOM	0	INDIA	14	UNITED STATES	Ø
Employee profiles								
Departments	Construction of the Construction							
Designations	San Jose		Tokyo		UAE			
Locations	UNITED STATES		JAPAN	0	UNITED ARAB EMIRATES	0		
Groups								

2. Enter location name and select the country

Location Details		
Location Name	Goa	
Mail Alias		
Country		
Description		
		<u>li</u>
State/Province	Select ~	
Time Zone	select $\sim$	



- 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.

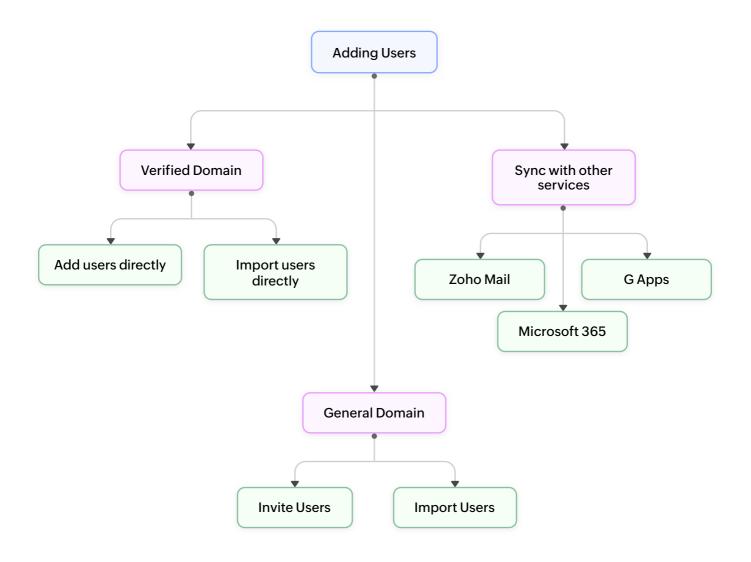
#### **Organization Structure**

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.



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

🛞 Pe	ople			Search	n Employee	0	Subsc	ription 🔅 🞗	$\oplus$	0 4	
Services	Setup	Tota	Users:	*			Add User Directly 🗸 In	nport 🗸 🛛 🖾 Syr	nc	V 1	0
ଜ	General		Basic in	formation 1	Date of Joining	Role(s)	Invite User Invite Multiple Users	Status			
Home	Organization Users		0	Suchitra Venkatesh, 1456 suchitra.v@zylker.com	16-Mar-2021	Team membe	Add Multiple Users Directly	Active	A	Ø	
Self-service	Employee profiles Departments			Steffi Green, CND117 steffigreen@yahoo.com	01-Sep-2020	Team membe	r California	Inactive		8	
organization @	Designations Locations			John Cornor, CND119 rayon.mark+agent7@zohotest.com	n 01-Sep-2020	Team membe	r Mumbai	Inactive	8	Ø	
Onboarding	Groups Delegation		Ş	hari.krishna hari.krishna, HRM16 hari.krishna@zylker.com	01-Sep-2020	Team membe	r San Jose	Terminated	A	Ø	
Leave	User Access Control		0	kavitha kavitha, HRM15 kavitha@zylker.com	01-Sep-2020	Team membe	r San Jose	Resigned	A	0	
<b>₽</b> Files	Customization			aaliya.khan aaliya.khan, HRM13 aaliya.khan@zyiker.com		Team membe	r San Jose	Terminated	8	0	

- 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

\*Email address georgeheyden

Next

YEE DATABASE			P
Add User Directly		×	
Employees added: 157 License count left: 1843			
Account Details Basic information			
Once your domain is verified, you will be able to add users click 'Add'. The user will be directly added to the organizat password that you provide.			
Email address			
georgeheyden @	zylker.com 🗸		
Preview:georgeheyden@zylker.com			
The oute-generated password will be cept to your email a	ddrass or Click bara to sat password		

The auto-generated password will be sent to your email address or Click here to set password
manually.

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.

😤 Pe	ople			Search Employee		0	Subsc	cription 💮	& ⊕	0	4	8
A.	Setup	Total	Users: #				Add User Directly 🐱 🛔	mport 🗸 🕻	Sync	$\nabla$	din.	0
ଜ	General		Basic information $\downarrow$		Date of Joining $\downarrow$	Role(s)	Invite User Invite Multiple Users	Status				
Home	Organization	0	Suchitra Venkatesh, 14	156	1217 (2011) (2222)	manand	Add Multiple Users Directly	- agepta	0.00	1025		
8	Users	113	suchitrav@zylker.com		16-Mar-2021	Team member		Active	8	Ø		
if service	Employee profiles	01	Steffi Green, CND117		01-Sep-2020	Team member	r California	Inactive		-		
Ba	Departments	1.000	steffigreen@yahoo.com	3	01-360-2020	reatmentuer	California	macuve		Ø	8	1
gatization	Designations	10 Å	John Cornor, CND119		01-Sep-2020	Team member	r Mumbai	Inactive		8		
0	Locations	100 1	rayon.mark+agent7@2	ohotest.com	01369 2020	realitingender	Picifical	mactive		0		
iboarding	Groups	10 1	ani.krishna hari.krishn		01-5ep-2020	Team member	r San Jose	Terminate	d A	8		
Ē.	Delegation		hari.krishna@zylker.co	n	0000.000.000000000				-	¢7		
Leave	User Access Control		kavitha kavitha, HRM3 kavitha@zylker.com	15	01-5ep-2020	Team member	r San Jose	Resigned	ጸ	8		
B	Customization		aaliya.khan aaliya.kha	HPM13								
	Automation		aallya.khan@zyiker.con			Team member	r San Jose	Terminate	d 8	8		
	Automation	1000	💡 karthik.ravi karthik.rav	d HRM12								
ALC: UNKIDO	Integrations		karthik.ravi@zylker.con		16-Jun-2020	Team member	r San Jose	Terminate	d A	3		



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.

57	License coun	t left: 184	)	
erified	, you will be able	to add use	s directly. Enter the email id and pass	sword. The verified
				rectly added to the
Do	main Name			
@	zylker.com	~	0	
@	zylker.com	~	⊝ €	
@	zylker.com	~	⊝ ᢒ	
asswor	d will be sent to	your email	address or Click here to set password	I manually.
	verified automa log in to Do @ @	verified, you will be able automatically. Click 'Add log in to the account wit <b>Domain Name</b> @ zylker.com @ zylker.com @ zylker.com	verified, you will be able to add user automatically. Click 'Add' after choo log in to the account with the passw Domain Name @ zylker.com v @ zylker.com v	verified, you will be able to add users directly. Enter the email id and pass automatically. Click 'Add' after choosing your domain. The user will be di log in to the account with the password that you provide. Domain Name           @       zylker.com       •       •         @       zylker.com       •       •

#### **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



🛞 Pe	ople				Search Employee		0		Si.	ibscription 🚳 🔗 1	€ Ç	
-	Setup	Tot	al Users	e #				Add	Jser Directly 🗸 👻	Import 👻 🖸 Sync	5	(d) (0)
ଇ	General		Basic in	nformation 4		Date of Joining 🌡	Role(s)	Location	Employee Stat	Import User	Actio	15
Home	Organization Usurs		0	Suchitra Venkatesh, 1456 suchitra.v@zylker.com		16-Mar-2021	Team member		Active	Import Users Directly	(h)	8
serserver	Employee profiles Departments			Steffi Green, CND117 steffigreen@yahoa.com		01-Sep-2020	Team member	California	Inactive	Invited		Ø
Lawe	Designations Locations		Ģ	hari.krishna hari.krishna, HRM16 hari.krishna@zylker.com		01-Sep-2020	Team member	San Jose	Active	Login Enabled	•	B
Attendence	Groups Delegation			aaliya.khan aaliya.khan, HRM13 aaliya.khan@zylker.com		01-Jul-2021	Team member	San Jose	Active	Login Enabled		ଞ
Verformance	User Access Control		-	karthik.ravi karthik.ravi, HRM12 karthik.ravi@zylker.com		16-Jun-2020	Team member	San Jose	Terminated	Login Disabled	Q4	ෂ
E File	Customization			kunal.patel kunal.patel, HRM11 kunal.patel@zylker.com		16-Jun-2020	Team member	San Jose	Terminated	Login Disabled	08	Ø

- 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

	Invite user		>
Dal	Employees added: 49	License count left: (301)	
05-		ds, and click invite. User gets email invitation sent to t repted, the user becomes part of the organization.	he email id mentioned.
03-	* Employee ID		
03-	* First Name	Last Employee ID test2	
03-	* Last Name		
03-	* Email address		
03-			
01-	Invite		

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.

Total Users: #			Add 🗸 🔤	mport v 🖸 S S	Sync 🖓	÷ C
□ Basic information ↓	Date of Joining $\downarrow$	Role(s)	Location	Status		2
Kavitha Vikrant, HR203 kavitha.v@gmail.com		Team member		Inactive	Resend invitation	
Kate Murray, BRG037 katemurray@zylkermail.com		Team member	Bruges	Inactive	<b>B</b> (8)	)
donna donna, HRM5 donna@zylker.com		Team member		Inactive	⊠ 8	,

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

#### **Invite Multiple Users**

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

2



Invite multiple users	>
Employees added: 49	License count left: 301
	parated by comma. Users get email invitations to their email id's and will
become part of the organiz Employee Email IDs	ation once they accept the invitation.
Employee Email IDs	

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



Employees added: 49	License count left: (301)	
	. <b>⊎</b>	
	Choose the file to be imported	
	[only xls and csv formats are supported] Maximum upload file size is 5 MB.	
	Upload File	

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.

	SearchEmployee	0			Subscription	~ & @ @ 4 <sup>-</sup> (
Total Users: #				Add User Directly 📿 🔒	nport 🤟	3 Sync
Basic information	Date of Joining 1	Role(s)	Location	Status		Import from Zoho Mail
Ann Parks, HR2121 annuarks@zylker.com		Admin		Active	8	Import from GApps Import from Office365
Ann Blake, HR205 blessyblake@gmail.com		Teammember		Inactive	12	Ø
Randall Gladstone, HR204 randoll@zydkec.com	01-Jan-2018	Team Lead		Active	B	®
Navaneeth Suresh, EU105 admintrfsi@zylker.com		Admin		Active	ß	Ø
Sandra Marks, EU104 sandra.markis@zylksr.com		Admin		Activa	B	®
Michael Garcia, EU103	06-Aug-2019	Team member		Active	æ	®





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

Employees added: (49) License count left: (301)	>
Q Search user	1 Users
Basic Information	
Charles charles.stones@zylker.com	

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

Employees added: 22	License count left: 1078	
	, and click invite. User gets email invitation sent to the he user becomes part of the organization.	e email id mentioned. Once
* Employee ID		
	Last Employee ID ceo1	
* First Name		
Last Name		
* Email address / Mobile		
Trigger Onboarding		

- 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
- 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 dialcodemobilenumber. 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.



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



<b>V</b> Zylker		Search	Employee	0		Subscription 💮	04
Setup	Roles Specific Role Assignment						
General Gathboard	Create different roles and assign permit	ssions to each role	to access organizational data.			+ Add	d New Role.
Company details off service Domains Rebranding	Admin General Role		Contracted works General Role	rs	Data Admin Specific Note		
B namization Organization	AllLocations	•	Configure Permission	0		0	
Hecoardine Employee profiles Departments Leave Designations	Director General Role		Manager Cleneral Role		System Administrator General Role		
E Locations terrelations Groups	Configure Permissions	0	Configure Permissions	0	Configure Permission	0	
O Delegation Tinisteel User Access Control	Team Load General Role		Team member General Role				
More Roles Permissions	Configure Permissions	0	Configure Permissions	0			
Allowed IPs Geo Restriction Sections Customization	B 3						

Role name		
Mumbai Support		
Clone role		
Team member	V	•

- 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

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#### 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

Assign Specific roles to Employee	es based on Department, Location and Organisatio	on hierarchy.	
Employee	145 Pedro Martinez Team member	~	
Role			
Data Admin	~		
Applicability			+ Add New
Select a Department	✓ Select a Location		

**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.



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		-		
Employee	145 Pedro Team mem		~	
Role				
Data Admin		*		
Applicability				+ Add New
Zylker Technologies	~	Cloud services	~	
Email & Collaboration	~	Marketing	~	
× California				
		+ Add Another Ro	le	

#### 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



Role name	
Transportation Team	
General Role Specific Role Clone role	
select	~

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

Create different roles and assign permissions to each	role to access organizational data.		+ Add New I
Admin General Role	Contracted workers General Role	Data Admin Specific Role	
All Locations	Configure Permissions	0	
Director General Role	Manager General Role	System Administrator General Role	
Configure Permissions	Configure Permissions	Configure Permissions 0	
Team Lead General Role	Team member General Role	Transportation Team Specific Role	
Configure Permissions 0	Configure Permissions	2 Configure Permissions (0)	

- 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



Assign Specific roles to Emplo	oyees base	d on Departi	ment, Location and Organis	ation hierarchy.	
imployee		1987 Kara Team memt		~	
Role					
Transportation Team			*		
Applicability					+ Add New
Select a Department		~	Select a Location		
			+ Add Anothe	er Role	

**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

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	Global Permissions A	Permissions						>
Form	Employee	Form	Employee	~	Role	Team Inc	harge	~
		Record Permissions	Field Permissions					
Roles		View	8	R	88	(R9	PRS	
Director		Edit	R	8	22	(RS)	289	
Manager Team Incharge		Add	X		AA	A.	P&94	
Team member		Delete	x	(&	89	<b>%</b>	288	
		Close						

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



Assign permissions for the role	Team member V		
Self-service function	Information based functions	Hierarchy functions	Collaborative functions
<ul> <li>Search Employee</li> <li>Attendance widget</li> <li>Delegation</li> </ul>	<ul> <li>Quick Links</li> <li>Tags</li> <li>API Access</li> <li>Show designation based on permission</li> <li>Announcement</li> </ul>	<ul> <li>Department Tree</li> <li>Department data</li> <li>Employee Tree</li> <li>Organization Tree</li> <li>Subordinate Tree</li> </ul>	<ul> <li>Birthday Buddy</li> <li>New joinee list</li> <li>Favorites</li> <li>Work Anniversary</li> <li>Wedding Anniversary</li> </ul>

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.

Enable specific users to perform adm and forms	inistrative functio	ns for sp	pecific modu	ules, fund	ctions	A	dmin Users: 12	Assi	gned Admin	Users:	4 Loc	ation Ad	lmin O	0
Modules & Settings ① Set Admi	n rights to users for s	ystem mo	odules like Lea	ave, Atten	dance etc.									^
	Attend	ance	File	is	Leave Tr	acker	Performance	Appraisal	Time Tr	acker	Onboar	ding	LM	5
Users	Settings	Data	Settings	Data	Settings	Data	Settings	Data	Settings	Data	Settings	Data	Settings	Dat
ZY200 Vignesh TK	٠	٠	•	•	•	•	۲	•	•	•		•	•	
ZY198 Christine Spalding	•	•	•	•	٠	•	•	•	•	•	•	•	•	•
ZY197 Aditi A	٠	•	•	•	•	•	•		•	•	•		•	
ZY169 Nivedhita Khan		•	•	•		•	•	•	•	•	•	0	•	
ZY100 Chloe O'Brien	•	0	•	•	•		•	•	•	•	•	0	•	
4570 Scott Fisher	•	•	•	•	•	•	•	•	•	•	•		•	•
4571 Tim Harrison	•	•	•	•	•	•	•	•	•	•	•	•	•	6
HRM2 Alberto Lane		•	•	•	•	•	•	•	•	•	•	•	•	
ZY 1000 Patricia Boyle				0										

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



Control Panel Functions ① Set	Admin rights to users for	specific system runc	tions like Permission	isettings, subscr	iption management,	etc.		^
Users	Permissions	Subscription	Automation	Services &	Forms Customiza	tion Website Integratio	on Import & Expo	ort History
ZY200 Vignesh TK	•		•		•	•	•	
ZY198 Christine Spalding	•	•			•	•	•	
ZY197 Aditi A	٠	•	٠		•	۲	•	
ZY169 Nivedhita Khan	•	•	•		•	•	•	
ZY100 Chloe O'Brien	•	۲	۲		•	•	•	
4570 Scott Fisher	•		0		0	•	•	
4571 Tim Harrison	•					•		
Forme OV Control Street			1					
Forms O Set admin rights to use	ers for forms like Trainin		ustom forms.		Р	erformance		
Forms ① Set admin rights to use				Locations	P	erformance Employee Competency	Company Policy	Trainin
		Syste	em Forms	Locations			Company Policy	Trainin
Users	Users	Syste Departments	em Forms		Competency		Company Policy	
Users ZY200 Vignesh TK	Users	Syste Departments	em Forms Designations	۰	Competency		•	•
Users ZY200 Vignesh TK ZY198 Christine Spalding	Users	Syste Departments	em Forms Designations	•	Competency		•	•
Users ZY200 Vignesh TK ZY198 Christine Spalding ZY197 Aditi A	Users 0 0 0	Syste Departments	Designations	•	Competency		•	•

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.



* To IP address * Modules	
Applicable For Applicable	Exceptions
Location All Locations	
Department X HR	
Designation All Designations	
Role x Team member	
(+)	
Employee	

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.

* From IP address			
* To IP address			
* Modules			
Applicable For	Ар	olicable	Exceptions
	Location	X Chennai	
	Designation		
		(+)	
	Employee		

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

Manage all the Geo Restrictions.		+ Add Geo Restriction
Name	Module(s)	
US Attendance	Attendance	
UK Attendance	Attendance	
Munich Service Engineer	Attendance	

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



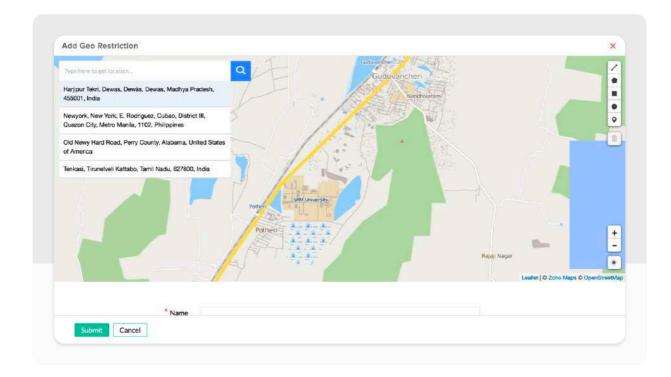
* Name • Modules			
Applicable For	Ар	plicable	Exceptions
	Location	All Locations	
	Department	× HR	
	Designation	All Designations	
	Role	× Team member	
		(+)	
	Employee		
1710000000000 m	(1) B. C	d	
Type here to get location			Arishinaya St Muthaya St aran St aran St

- 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



* Name				
* Modules				
Applicable For	Applic	able	Excepti	ons
	Location	X Chennai		
	Designation			
		(+)		
	Employee			
	K B B			
Type here to get location	A Date of the second second	ay St	Kildhnappa T Muthaiya St	datist
	wall Tax	Tama awamy S	Krish	An Mudtait St
	x Road		Contraction of Contraction	Vakan
INTROTA LINE A CONTRACT	NH5			

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





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.

dd Shift		)
Shift Name	General Shift	
From	9:00 AM (5)	
to	6:00 PM (3)	
Shift Margin	Senable ○ Disable ⑦	
	1:00 O hours before the shift starts	
	3:00 O hours after the shift ends	
	Check-in/check-out entries only within 8:00 AM - 9:00 PM will be considered as payable hours	
Weekend	O Location Based O Shift Based	
Shift Allowance	S Enable O Disable	
Rate per day	0	
Applicable for	X Departments Clear	

- 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



### SHIFT MANAGEMENT

	C Location Base	id 💟 Si	hift Base	ed			
Weekend definition			Weeks				
	Days	All	1st	2nd	3rd	4th	5th
	Sunday						
	Monday						
	Tuesday						
	Wednesday						
	Thursday						
	Friday						
	Saturday						

- 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

	Provide and a second second	
	Departments	Q Search
	Locations Division	<ul> <li>Information Technology</li> <li>Public Relations</li> <li>Inventory</li> <li>Legal</li> <li>Administration</li> <li>Zylker Mail</li> <li>Zylker Meeting</li> </ul>
		<ul> <li>Sales</li> <li>Marketing</li> </ul>
Note: Croating st	off-based-weekends will ov	verride Location-based-weekends if they already exist for this record.



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

List View	< Oct 2019 >	Assignshift
Employee 👙	Shift(s)	Modified On
HRM31 Donna Paulsen	US Shift(09pm-05am) 04-Mar-2019 - 28-Mar-2022	08-Mar-2019 01:23 PM
BRG042 Oliver Christensen	US Shift(09pm-05am) 04-Mar-2019 - 28-Mar-2022	08-Mar-2019 01:23 PM
BRG043 Rachel Banks	US Shift(09pm-05am) 04-Mar-2019 - 28-Mar-2022	08-Mar-2019 01:23 PM

- 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.

## SHIFT MANAGEMENT

**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

Applicable For	Locations Clear	3
Shift Name	General	*
Date	01-Oct-2019 - 31-Oct-2019	bdin 111

5. Click Submit

#### From the Shift Calendar tab:

Calendar View		< 22-Oct-201	9-28-Oct-2019 >		Week Day Assigns	hift 🖓 😶
Employee ≑	Oct 23	Oct 24	Oct 25	Oct 26	Oct 27	Oct 28
	Wed	Thu	Fri	Sat	Sun	Mon
😨 ZY200 Vignesh TK	General	General	General	General	General	General
	(09am - 06pm)	(09am - Oópm)	(09am - 06pm)	(09am - 06pm)	(09am - Oópm)	(09am - 06pn
2Y198 Christine Spalding	General	General	General	General	General	General
	(09am - 06pm)	(09am - Oópm)	(09am - 06pm)	(D9am - O6pm)	(09am - Oópm)	(09am - Dópr
ZY197 Aditi A	General	General	General	General	General	General
	(09am - 06pm)	(09am - O6pm)	(09am - 06pm)	(09am - 06pm)	(09am - 06pm)	(09am - 06pn
CY196 Rinzee Wilma	General	General	General	General	General	General
	(09am - 06pm)	(09am - O6pm)	(09am - D6pm)	(09am - 06pm)	(09am - 06pm)	(09am - 06pr
2Y195 Kavin Edwards	General	General	General	General	General	General
	(09am - 06pm)	(09am - O6om)	(09am - 06pm)	(09am - 06om)	(09am - 06om)	(09am - 06pm



- 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	🗹 Administrator 🛛 Reporting Manager 🖉 Employee
Edit employee shift mapping	🗹 Administrator 🛛 Reporting Manager 🗹 Employee
Allow changing shift for past dates	Reporting Manager Employee
Email notification for shift modification	S Enable O Disable
Feeds notification for shift modification	Enable O Disable
Eligibility for Shift Allowance	0:00 ③

- 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 <u>automation features</u> in Zoho People.

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**

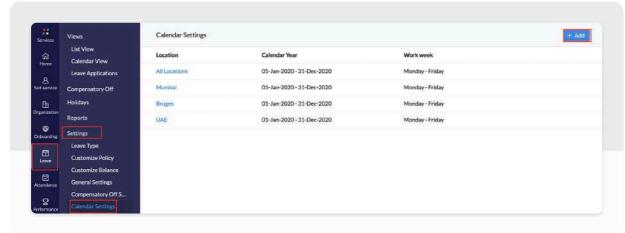
49

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





Week definition							
	Week starts on	Sunday		*			
	Work week starts on	Monday		~			
	Work week ends on			*			
	work week ends on	Friday		Ť			
Weekend definition							
		All	1st	2nd	3rd	4th	5th
Sunday			2	5	5		5
Monday							a
Tuesday						0	
Wednesday			0		0		D.
Thursday	0		n a	13	C1	13	11
Friday							
Saturday	2		63	53	<b>S</b>	2	52
Calendar Year							
Current ye	ar (January to December)						
	C The year starts from	01-Jan-2013	Ð	and ends or	31-Dec-2013		
Statutory Weeken	đ						
Define statutory	weekends and track statuto	ry weekend hours	separately.				
	Statutory Weekend	* Sunday					

- 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

* Name	Hannukah		
* Date	22-Dec-2019	4	
	Sun 22-Dec-2019	Full Day	~
Applicable For	≍Shifts General ×	Clear	(B)
Description			
No of day(s) before which the reminder should be sent	1 ~		
	<ul> <li>Notify Applicable Employees</li> <li>Reprocess leave applications baa (Leaves that are already applied for th and the balance will be adjusted according to the adjusted according to t</li></ul>	is holiday will be reprocessed	
	Note : Shift based Holidays will ow	erride the location based Holi	days.

- 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

* Name	Casual Leave		
Image	1		
Code	CL		
* Туре	Paid	~	
* Unit	Days		
* Balance based on	Fixed entitlement O Leave g	rant	
Description			

- 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.

Eff	ective After	6	Month(s)	~	from	Date of	Joining	~							
~	Accrual	Yearl	y ~	on	1st	Date of Joining 1st Date of Confirmation		~	No. of Days	10	in	Current	t accrual	~	
2	Reset	Yearl	y ~	on	Last Day			~							
		Carry I	Forward	50	Percenta	Percentage 🗸 Max Limit		5		Expires in	12	Mo	onth(s)	~	
		Encash	ment	50	Percenta	ge 🗸	Max Limit	5							
	Prorate Accrual			Starta	and End of P	Policy	✓ Advance	ced							
	More Options +														

**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.

Entitlement	Applicable	Restrictions		
Applicable			Exceptions	
Department				
Designation				
Location				
Role				
+ Add field				
Employee type				
Source of hire				
Reporting To				

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 dropdown 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.

Weekends Between Leave	Period :	
O Count as leave: Cour	nt after days	
On't count as leave		
Holidays Between Leave P	eriod :	
O Count as leave: Court	nt after days	
O Don't count as leave		
While Applying Leave, Exco	eed Leave Balance :	
Allow O Don	't Allow	
O Without limit	O Until year end limit	Without limit and mark as LOI



#### **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:

* Name	Casual L	eave								
Image										
Code	CL									
* Type										
		20			~					
* Unit		O Ho								
* Balance based on	Fixed e	entitleme	nt Ol	eave grant						
Description										
Validity	24-Jun-2	2010	œ T		Ē.	0				
	24 3011 2	-010								
	24 54112	.010								
Entitlement				licable			estrictions			
	24 301 2						estrictions			
Entitlement		-	App	licable		R				
	6	Montl	App	licable	Date of	R	estrictions			
Entitlement		Month	App	licable		R		) 🖽 in	Current accrual V	
Entitlement Effective After	6 Mont Yearl	Montl	App n(s) v	from 1st Last Da	Date of	R	~		Current accrual V	
Entitlement Effective After Accrual	6 Mont Yearl Carry Foru	Montil thly y ward	App n(s) v on v on v 0	licable from 1st Last Da	Date of v ay v tage v	Joining No. of Days Dec Max Limit	× 1		Current accrual V	
Entitlement Effective After Accrual	6 Mont Yearl	Montil thly y ward	App n(s) v v on v on	licable from 1st Last Da	Date of	R Joining No. of Days Dec	× 1		Current accrual V	
Entitlement Effective After Accrual	6 Mont Yearl Carry Foru	Montil thly y ward	App n(s) v on v on v 0 0	licable from 1st Last Da	Date of v ay v tage v tage v	Joining No. of Days Dec Max Limit	× 1 ×		Current accrual V	
Entitlement Effective After Accrual Reset	6 Mont Yearl Carry Foru	Montil thly y ward	App n(s) v on v on v 0 0	licable from 1st Last Da Percen Percen	Date of v ay v tage v tage v	Joining No. of Days Dec Max Limit Max Limit	× 1 ×		Current accrual V	

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.

General Settings	
Compensatory Off	
Mode to add Compensatory Off entry	Both ~
Add Compensatory Off for future date	O Enable O Disable
Leave to be credited when work is done on a Weekend	1 x 5 (i.e) 1 day(s) x 5 = 5 day(s), 3 hour(s) x 5 = 15.00 hour(s)
Leave to be credited when work is done on a Holidays	1 x 3 (i.e) 1 day(s) x 3 = 3 day(s), 3 hour(s) x 3 = 9.00 hour(s)
Credited leave expires after	10 calendar day(s) $\checkmark$
Unit(s) Allowed	Both ~
Duration(s) Allowed	🗹 Full Day 🛛 Half Day 🔽 Quarter Day
Time Input	🔿 Enable 🧿 Disable
Make reason mandatory	

#### **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.



#### **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 dependent 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

onfigure Pay Period							×
Pay period name	Seattle pay per	riod					
Pay period cycle	Monthly	~					
	26th	~		25th		~	
Payroll processing day	27th	~					
Payroll report generation day	28th	~					
	Process leav	e encashr	nent				
	Lock (Any me Timesheet e will be locke	ntries for	the p	period menti	ioned abo		
Applicable location	× Seattle						
i) Upcoming Pay Cycle : 26-M	ncashment details &	& Overtime					ed on 27-Jun-2021 by 11:59 I.
	ncashment details & ttendance, Leave o se generated on 28-	& Overtime r Timeshe	et en	tries, will be l	ocked at 3	1:59 PM	

#### 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

General Settings		
Inclusion of weekends or holidays as leave		
Number of consecutive leaves after which weekends or holidays are to be considered as leave	2	
Select applicable leave types	×Leave Types Annual Leave × Casual Leave ×	Clear

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.

> Pe	ople	Sea	ch Employee	e 🙂
lces	Views	General Settings		
ປ <sub>ne</sub>	List View Calendar View	Permissions		
	Leave Applications	Resource availability repor	t access	All data to all users $\lor$
rvice ]	Compensatory Request Leave Grant	Payroll Report Settings		
ve 1	Holidays	Enable Payroll Report fo	r Admin	O Enable 🔘 Disable
) heet	Settings Leave Type	Include W	eekend(s)	🔿 Enable 🧕 Disable
] lance	Customize Policy Customize Balance	Include	Holidays	O Enable O Disable
3	General Settings	LOP Report settings		
ation } 3	Compensatory Requ Calendar Settings	Unpaid leave to be	marked as	<ul> <li>Loss of pay</li> <li>Carry Over to next pay period</li> </ul>
•	Pay Period Settings Exceptional Working	Maximum LOP cour	t allowed	31 day(s) ①
	Bradford Score Setti Module Administrat	Export Settings		
nance		Enable Password F	rotection	0
t Ine		Leave Request Settings		
		Make reason for Leave cancellation m		
		Allow leave requests unt	il the next	2 calendar years 🗸

#### **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

	Name format for leave	Employee Name 🗸 🗸	 Leave type name	Y	$\oplus \bigcirc$
		Format Employee Name			
Bradford Score Settings					

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 <u>automation features</u> 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

General Settings		
General		
Effective from	01-Jan-2013	and a second sec
Default shift time	General [09AM - 06PM]	*
Scale view	🗿 Enable 🔘 Disable	

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.

## ATTENDANCE MANAGEMENT



#### 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).

O First Check-	in & Last Check-ou	ut 🔘 Every Valid C	heck-in & Check-out
Strict Mode	C Lenient Mode	e (Expected Hours)	
O Manua	I Input ① 〇 :	Shift Hours	
Full Day	4:00	C	
Half Day	3:59	G	
Show Over /	Deviation Time		
	<ul> <li>Strict Mode</li> <li>Manua</li> <li>Full Day</li> <li>Half Day</li> </ul>	Strict Mode C Lenient Mod     Manual Input C      Full Day 4:00	Full Day4:00Image: Constraint of the second s

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 a full 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.

First Check-In	10	minutes
Last Check-Out	10	minutes
Worked Hours	10	minutes

#### 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.



### **ATTENDANCE MANAGEMENT**

Pay Days/Hours Calculation	
Include Weekend(s)	🔿 Enable 💿 Disable
Include Statutory Weekends(s)	• Enable 🔿 Disable
Include Non-Statutory Weekends(s)	🔿 Enable 💿 Disable
Include Holidays	🔿 Enable 💿 Disable
Include Leave	• Enable 🔿 Disable
Carry over balance hours in overtime report	🔿 Enable 💿 Disable

#### 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**

Per Per	ople		Search Employee	G	Subscriptio
Services	Views	General Settings			
Ca Home	List View Tabular View	Late night work hours For each location, define a period of tim	e to track late night work hours. Lat	e night work hours will be tracked	separately to facilitate separate pay calculation.
<b>A</b> eff-service	Calendar View Overtime View	Z Enable tracking			
(Banzation	My Requests My Approvals	Mumb	ai v 8:00 PM	0 6:00 AM 0	•
<b>e</b> kboarding	Reports	Permissions			
E Leave	Shift Schedule Settings	Web Check-in / Check-out	O Enable 🔘 Disable		
ttendance	General Settings User/Shift Specific S	Mobile Check-in / Check-out	Enable O Disable		
8 eformance	User ID Mapping Absent Schedule	Capture and save photo when employee checks-in or checks-out using mobile app	O Enable 🔘 Disable		
*** More	Approval Settings Pay Period Settings IP Restriction	Capture and verify photo when employee checks-in or checks-out using mobile app	O Enable 🔘 Disable		
	Geo Restriction	Make location sharing mandatory	Web Check-in / Check-out	Mobile Check-in / Check-out	
0	Present by Default Module Administrat	Show all Check-in / Check-out entries	C Enable 🔘 Disable		
Settings		Viewtheir resurteer' estrier	Fooble O Dicoble	Submit Reset	

#### Permissions

Permissions	
Web Check-in / Check-out	• Enable 🔿 Disable
Mobile Check-in / Check-out	• Enable 🔿 Disable
Capture and save photo when employee checks-in or checks-out using mobile app	• Enable 🔿 Disable
Capture and verify photo when employee checks- in or checks-out using mobile app	• Enable 🔿 Disable
Make location sharing mandatory	Veb Check-in / Check-out 🗌 Mobile Check-in / Check-out
Show all Check-in / Check-out entries	• Enable 🔿 Disable
View their reportees' entries	• Enable 🔿 Disable
Edit their reportees' entries	• Enable 🔿 Disable
	Votify example@domain.com
Edit their own entries	🔾 Enable 💿 Disable
Show attendance report page	ddministrator 🗹 Reporting Manager
Show balance over time view	🗹 Administrator 🗹 Reporting Manager 🗹 Employee
Edit balance over time view	🗹 Administrator 🗹 Reporting Manager 🗹 Employee
Show Check-in/Check-out location	• Enable 🔿 Disable



#### 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**

hift Settings	
View employee shift mapping	🗹 Administrator 🛛 🗹 Reporting Manager 🗌 Employee
Edit employee shift mapping	🗹 Administrator 🛛 🗹 Reporting Manager 🛛 Employee
Allow changing shift for past dates	Z Reporting Manager
Email notification for shift modification	Enable O Disable
Feeds notification for shift modification	O Enable O Disable
Eligibility for Shift Allowance	0:00 ③

- 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.



# ATTENDANCE MANAGEMENT

#### **Shift Reminders**

Check-in	reminder for e	mployees	Customize email template
	0:30	Ġ	hours before shift's start time
	0:30	G	hours after shift's start time
Check-o	ut reminder for	employees	s Customize email template
	0:15	G	hours before shift's end time
	0:15	G	hours after shift's end time
Notifym	anager when re	eportees do	on't check-in Customize email template

- 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:



# **ATTENDANCE MANAGEMENT**

#### Shift Reminders

0:30       Image: Sector Control of C	Check-in reminder for employees			Customize email template
Check-out reminder for employees Customize email template          0:15       Image: Customize email template		0:30	G	hours before shift's start time
0:15		0:30	G	hours after shift's start time
0.15	Check-out	reminder for	employees	Customize email template
0:15 (B) hours after shift's end time		0:15	G	hours before shift's end time
		0:15	G	hours after shift's end time
Notify manager when reportees don't check-in Customize email templ	Notify man	ager when re	eportees do	on't check-in Customize email template

- 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.



Regularization for future dates	Enable	
Regularization request can be raised	day(s) from the date to be re	egularized 🛈
	day(s) a Week 🗸	
Reason for Regularization	Enable O Disable	
	Forgot to check-in	
	Forgot my ID card	
	System error	

*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.

Export	Settings			
	Password protection	6	○ Enable	

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

Absent Schedule ①			+ Add Schedule 💮
Schedule Name	Time of Schedule	Attendance Date 👙	
Absent Schedule	00:00 AM	Before 1 day	
Were you absent?	09:00 PM	Before 1 day	
Managers Schedule	08:00 PM	Before 0 day	
USA Absent Schedule	00:00 AM	Before 1 day	
Bruges Absent Schedule	02:00 PM	Before 1 day	> 2 ≣



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

Name	Seattle Absent Schedule	
Schedule runs daily at	12:00 AM 🔘 and will process absence data of 1 day before 🗸	
	<ul> <li>Push absence data to leave module</li> <li>Notify through Email</li> <li>Customize mail template</li> </ul>	
	On       1       ✓       day of absence          Notify employee on their absence       ✓       Notify reporting manager about their reportees absence         Notify specific users(such as HR or Admin)	
	On       2       v       day(s) of consecutive absence         Notify employee on their absence       Notify reporting manager about their reportees absence         Notify specific users(such as HR or Admin)         X ZY200 Vignesh TK       X ZY198 Christine Spalding	
	+ Add more	
nary beduler will peyt rup at 12:00 AM	tomorrow and will process absence for 17-Sep-2020.	

- 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

Views			
List View	Regularization		+ Add Approval Approval Settings
Tabular View			
Calendar View	Name	Template Name	Status
Overtime View	Attendance Regularization	New Attendance Regularization request	
My Requests			
My Approvals			
Shift Schedule			
Settings			
General Settings			
User/Shift Specific S			
Permission			
User ID Mapping			
Absent Schedule			
Approval Settings			

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

Add Approval		>
Form Name	Attendance Regularization $\sim$	
Name of the Approval		
Criteria		
The appro	val process will be triggered when the following criteria requirements are satisf Set Criteria	ied.
Approvals		
You can eit	her configure approver levels or allow the system to auto approve / reject the re Configure Approver	cord.
	(OR)	
	Auto Approve O Auto Reject	
Enable follow-up option fo	r this approval	
Message		
	nfigure suitable approval message to send out to approvers & other recipient.	
Save Cancel		



- 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.



-		cript for Select P 1000 [userId]		ws command from .	SMS **	*****/			
1		ventTime]	as emp	TOTEEIG					
		sCheckin]							
		ownloadDate]							
	FROM [Z	Attendance].[db	oo].[Att	endance]					
		1							
2	Results 🚮 N	lessages							
3	Results 🔂 N employeeld	Nessages event Time	isCheckin	downloadDate					
			isCheckin 1	downloadDate 2017-02-20 09:01:00					
	employeeld	eventTime	isCheckin 1 0	and the second se			 		
	employeeld Emp1	eventTime 2017-02-20 09:00:00	1	2017-02-20 09:01:00			 		
	employeeld Emp1 Emp1	event Time 2017-02-20 09:00:00 2017-02-20 18:00:00	1	2017-02-20 09:01:00 2017-02-20 18:26:00				_	
	employeeld Emp1 Emp1 Emp1	eventTime 2017-02-20 09:00:00 2017-02-20 18:00:00 2017-02-21 11:00:00	1 0 1	2017-02-20 09:01:00 2017-02-20 18:26:00 2017-02-21 12:03:00					
	employeeld Emp1 Emp1 Emp1 Emp1	eventTime 2017-02-20 09:00:00 2017-02-20 18:00:00 2017-02-21 11:00:00 2017-02-21 17:31:00	1 0 1	2017-02-20 09:01:00 2017-02-20 18:26:00 2017-02-21 12:03:00 2017-02-21 17:31:00			 		

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



### 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.



Employee ID / Employee Name	Search Employee	~
Mapper ID		

### Shift Mapping

80

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.

lp			
ary 🕶 Share with 🖛 New folder			
Name	Date modified	Туре	Size
📕 docs	09/12/2020 2:55 PM	File folder	
🎳 manager	09/12/2020 2:55 PM	File folder	
📕 ROOT	09/12/2020 2:55 PM	File folder	
]] ZAttendance	09/12/2020 3:19 PM	File folder	
ZAttendance.war	09/12/2020 3:19 PM	WAR File	10,558 KB

### 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  $\rightarrow$  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  $\rightarrow$  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

enerate Refresh Token	×
Client ID	
Client Secret	
Code	
C Type US V	
Generate 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

- 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:

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- 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.

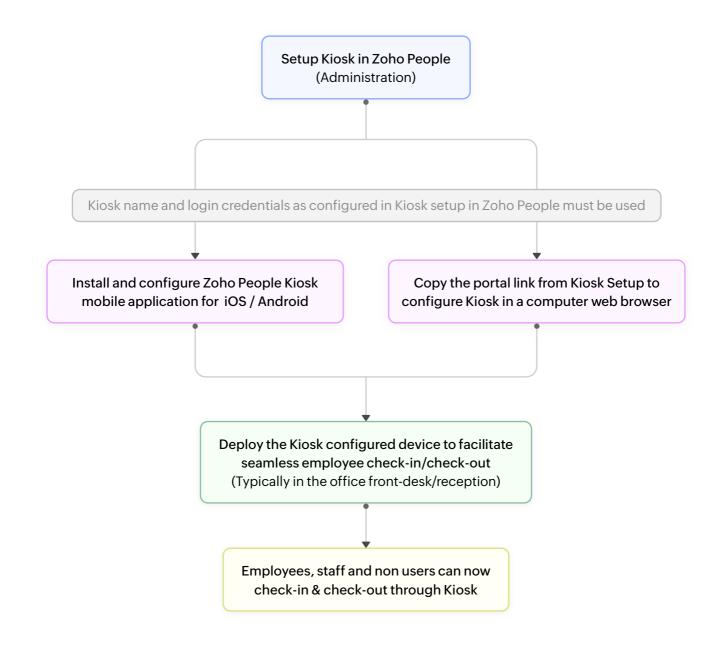
### Zoho People Kiosk

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.



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**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

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Services	Views	Zoho People Klosk is an onsite attendance management solution that let's employees check-in and check-out through a guick photo capture, Learn more
	List View	
Home	Tabular View	
DATE	Calendar View	
8		
elf-service	Reports	Setup your kiosk portal
Ħ	Shift Schedule	an and a standard concernment of a standard st
Leave Tracker	Settings	Name your klosk
Time Tracker	General Settings	E 2
	User/Shift Specific 5	
ttendance	User ID Mapping	
	Absent Schedule	
(B) Instantion	Approval Settings	
	Pay Period Settings	
B	IP Restriction	
	Geo Restriction	
CARS	Present by Default	
CARS	Module Administrat	Association
슜		Klosk Name zyleerremoteoffice
RSenfoes		
ø		Save
inboarding		
<b>A</b>		
Office Readiness		
More		
ø		
Settings		<b>O</b>

- 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



Klosk Name : zylkerremoteoffice 🦯 Copy Klosk Link 🔲 Click here to copy the Klosk portal access URL	Add Login Credentials		
No login configured	Device Name Login Email Address Login Fassword Time Zona Country Language	Front_desk_01 security@rylker.com (GMT+05:d0) India Standard Time (Asla/KoL v United States v English v	
The Administrator can add and coofigure Klesk login credentiats here. The redentiats can the Kleak web portal. + Add Lagin Credentias	<ul> <li>Login credentials can belong to security@zviker.com or luke80</li> <li>The user has to varify the according to the second sec</li></ul>	o any employee or staff, it need not belong to the administrat genrizons, unt to be able to use the cradentials. It he front-office or concerned staff to configure in web or m	

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.

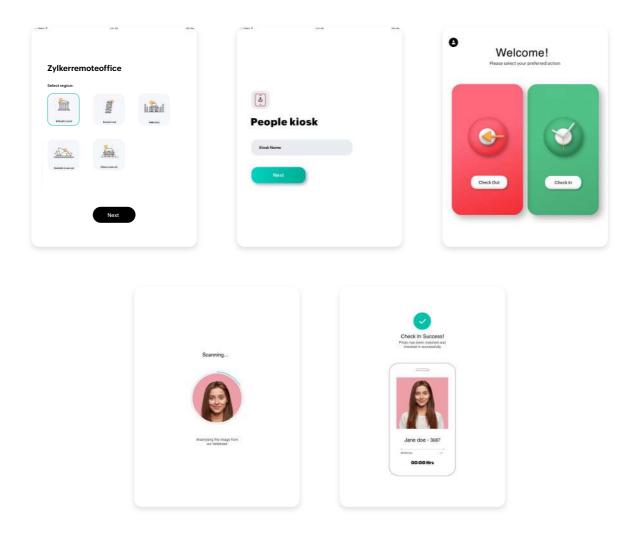
Note that the Administrator must provide the login credentials and kiosk name (refer to screenshot B) to the concerned staff, employee or staff, it need not be the administrator or an on-role employee.

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### 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)

6	bular View	× +	
8	slendar View 🧲	C Q xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	
	orts	Paste the access URL in your web-brow	ivser
Lewe racker	t Schedule	(ô)	Ô
() Sett	tings	S	$\otimes$
ader	eneral Settings ser/Shift Soecific S		Smart facial recognition for onsite attendance
<b>e</b>	aar ID Mapping	Zoho People Kios	
A	osent Schedula	-ono reopie Rios	SK security@zylker.com
2012201015	aproval Sattings		
a l	w Period Settings Restriction	zylkerremoteoffice	
Fle	eo Restriction		Sign In
A 22	esent by Default	Next	
M	odule Administrat		
습 Services	öskostup		
•			
mettine			
A mice solitions			
admensi			

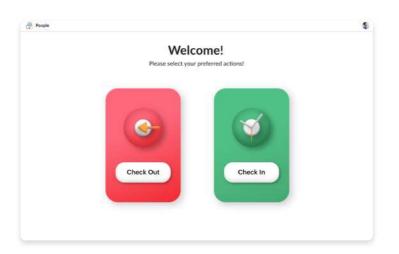
3. That is it! Now employees can check-in and check-out using the corresponding action buttons. Ensure that webcam access is allowed in your web browser to be able to use this feature

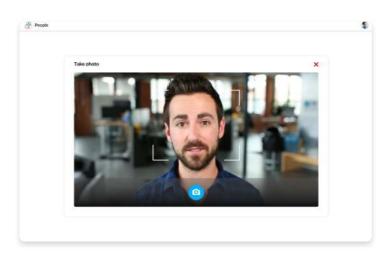
### How can employees check-in/out using Kiosk mobile app or web-portal?

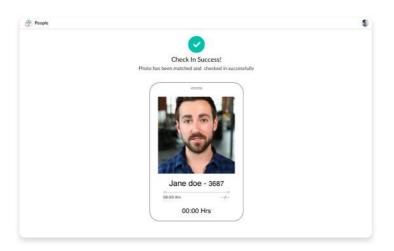
- 1. Any employee can check-in/out by using one of the configured devices. (typically the organization may use it in the reception, front-desk)
- 2. On clicking the action button (Check-in or Check-out), the user will be prompted to take a photo
- 3. Once the photo is clicked, the image will be matched 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



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### 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 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

ZY198 Christine Spalding ~		06/11/20	18 - 12/11/2018 >			Log Time 🗸 🛛 🕅	
Select Client 🗸 Select Proj	ct 🗸	Select Job 🗸	What are you working on?	Billable	~	Ō 00:00:00	
Nov 7, 2018		Select Job	00:01				
Iterations * CR Group		Stats reports Reports	Billable 00:01		€		
		Sales data submission DAP Core					
		DAP Core Add Job					

- 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



Job Name	Website work	0
Project	Felix project 🗸	Ŧ
Start Date	23-May-2019	Ē
End Date	01-Dec-2019	11 I
Hours	15:00	
Rate Per Hour		

- 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



Assignees	✓ Users			Clear
	Christine Spalding	10:00 Hrs	0 RPH	×
	Estimated Hours	10:00 Hrs		
	✓ Departments			Clear
	Information Technology × Ad	ministration x		
	∽ Sector			Clear
	Generic Medicines $\boldsymbol{x}$			
_				
Billable Status	Billable 🗸			
Work Item ①				
0	Authorization		E5 E3	

- 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



ZY198 Christine Spalding ~		< 06/11/201	.8 - 12/11/2018 >			Log Time 🗸 🛛 🖓
Select Client 🗸 Select Project	~	Select Job 🗸	What are you working on?	Billable	~	Ō 00:00:00
<ul> <li>Nov 7, 2018</li> <li>Iterations * CR Group</li> </ul>		Select Job Stats reports Reports	00:01 Billable 00:01		۲	
		Sales data submission DAP Core				

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

Jopa	· •					User Depart	tment + Add Job 🍸 😬
	Job Name 🕴	Start Date	End Date	Estimated Hours	Logged Hours	Status	User(s)
	• Al Dasca	06/08/2018	17/08/2018	0 Hrs 0 Mins	2 Hrs 0 Mins	0	+ Assign Users
	Christine Spalding			0 Hrs 0 Mins	2 Hrs 0 Mins		
	Reports * Requirement Gathering	09/08/2018	15/08/2018	0 Hrs 0 Mins	41 Hrs 48 Mins	0	10
	Sales data submission * Whitepaper	01/08/2018	13/08/2018	0 Hrs 0 Mins	18 Hrs 55 Mins	0	2
	DAP Core * Xtra features	01/08/2018	06/08/2018	0 Hrs 0 Mins	25 Hrs 28 Mins	0	20

oose to be ma	apped	2
Assignee(s)	christine	
	ZY198 Christine Spalding	
	ZY143 Chloe Christine	ssignee(s) Cancel

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.

Đ	elete Map A	ssignee(s)	1ap Department(s	1						
	Job Name 🔅	Reference	Start Date	🗧 End Date	÷	Estimated Hours	Logged Hours	Status	User(s)	
	<ul><li>Stats reports</li><li>Al Dasca</li></ul>		06/08/2018	17/08/2018		0 Hrs 0 Mins	2 Hrs 0 Mins	0	20	
	Reports • Requirement Gathering		09/08/2018	15/08/2018		0 Hrs 0 Mins	41 Hrs 48 Mins	0	<b>1</b> 0	
	Sales data submission * Whitepaper		01/08/2018	13/08/2018		0 Hrs 0 Mins	18 Hrs 55 Mins	0	4	

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

Project Name	Estimated Hours	Logged Hours	Status	Jobs	
Al Dasca * Emma	*	a.	0	6	
CR Group + Emma Daniel	÷.	*	0	8	
DAP		æ	0	<b>6</b>	
DAP	5	85	0		

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

Project Name	Ke	Ivin Constructions				
Client Name	Re	ichel and Sons 🗸	Choose	From CR	м	1
Project Cost	12	200000				
Project Head	Ch	ristine Spalding ZY198 🗸	100		RPH	
Project Manage	r ,	Vignesh TK ZY200	100	RPH	×B	
Project Users	v	Users			Clear	
		Aditi A ZY197	80	RPH	×	
	1	Rinzee Wilma ZY196	80	RPH	× -18	
	~	Departments			Clear	
		Operations × Fire & Safety ×				
	×	Sector Generic Medicines ×			Clear	



- 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

(	Add Project					
	Project Name	ARK constr	uctions			
	Client Name	Select ~			Choose From CRM	<b></b>
			CRM Lead	Q. Search		
	Project Cost		CRM Account			
	Project Head		CRM Contact	Marc		
	Project Head	Christine S	CRM Deal	Mike Schindle		
	Project Manager			Apex Corp - s	olar installation	
	in opect manager	Vignesh Ti				
	Project Users	✓ Users				
	52	<ul> <li>Osers</li> <li>Rinzee Wi</li> </ul>				
			ards ZY195		80 RPH ×	-
		> Departm	ents 🐻			
		> Sector				

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**



Projects 🗸			1	Iser Department + Add Proje	ct 🛛
Project Name	Estimated Hours	Logged Hours	Status	Jobs	
Al Dasca • Emma	Ϋ́	2	0	+ Add Jobs	a
DB Migration	3 Hrs 0 Mins	4 Hrs 11 Mins	0		
App Customisation	50 Hrs 0 Mins	47 Hrs 59 Mins	0		
Reports		3 Hrs 0 Mins	0		

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



Project Name	ARK constructions						
Client Name	Select ~	Cho	Choose From CRM				
Project Cost							
Project Head	Christine Spalding ZY198 $ \sim$	Rate		RPH			
Project Manager	Vignesh TK ZY200		100 RPH	×			
Project Users	22 22/2000/2018						
rujeti Osera	✓ Users			Clear			
	Rinzee Wilma ZY196 Kavin Edwards ZY195	80 RPH 80 RPH	- 84				
	<ul> <li>Departments</li> </ul>		SU REH	Clear			
	(] Q:Search						
Description	Information Technology Inventory Legal Administration Creative Operations Dept of Human Resources Marketing						

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

Clients 🗸				+ Add Client
Client Name 🗘	Contact Person		Industry	
Emma	Emma Daniel	emma@gmail.com 9876543210		
Geregory Alex	8.2			
Jane	Jane Smith	jane@zby.com 4098756793		
Jeniffer Andrew	8/2	jenniffer.a@jb.com	FMCG	
John Mike	82	john.mike@zylker.com 9945511122	FMCG	
Patrick	Patrick Luis	0865432325	SME	
C Robin Li	Robin Li	robin@zaf.com 2348761234	Automobile	2.1

- 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)



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Client		
Client Name		
Currency	Select 🗸	
Billing Method	Select ~	
Contacts	Select	
EmailId	Hourly Job Rate	
First Name	Hourly User Rate - Jobs	
Last Name	Hourly User Rate - Projects	
Phone		
Mobile		

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



ZY198 Christine Spalding ~		21-May-2019 - 27-May-2019 >			Log Time 🗸 🛛 🖓		
Zylker Corporation 🗸	Code Testing	∽ Bug fixing	<ul> <li>Identifying errors</li> </ul>	Billable	~	00:00:00	
Zyrker Corporation 🗢	Code lesting	✓ Bug ixing	<ul> <li>Identifying errors</li> </ul>	Billable	~	00:00:00	

- 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

Project Name	DreamWorks Pitch 🐱	Œ
Job Name	Develop Deck 🗸	Œ
Work Item		
Date	09-Nov-2020	Ē
Description		
	Total hours Start and end time Timer	4
Hours	10:00 ①	
Billable Status	Billable 🗸	
Attachment	Upload from Desktop or Zoho WorkDrive or Others	C

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



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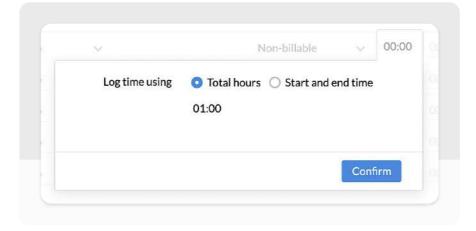
2. Click the Log Time dropdown

Time Logs	ZY200 Vignesh TK 🗸 🗸	< Today >	LogTime 🛩 🛛 🍸 …
	Mar 17, 2021	16:00	LogTime
Calendar View	Mar 17, 2021	1000	Daily Log
Timesheets	Sales pitch + Merchandise sales review	Billable 06:00 🖓	Weekly Log
Projects/Jobs	Prototype Submission • Jillian and Jillian	Biliable 10:00 O	Semi Monthly Log
Job Schedule			Monthly Log
Reports			
Settings			

- 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.

. 33	ZY198 Christine	e Spaid	ling 🗸		< 09-Jar	n-2022 - 15-Jan-2022	2 8	2			W	/eekly Lo	g	~	Clone	
S.No	Project Name		Job Name	w	ork Item	Billable Status		Jan Sur				an 12 Wed	Jan 13 Thu	Jan : Fri		
1,	Code Testing	~	Bugfixing	~		Billable	9:21	1 AM - 12:2	2 PM 10	00;00	00;0	0 00	00	00:00	00:00	01:0
2.	DreamWorks	~	Create Pitch D	~		Billable	~	03:01	00:00	00:00	00:0	0 00:	00 0	00:00	00:00	03:0
3.	Code Testing	~	Bugfixing	~		Billable	~	02:00	00:00	00:00	00:0	0 009	00 (	00:00	00:00	02:0
4.	DreamWorks	~	Create Pitch D	~		Billable	~	02:00	00:00	00:00	00:0	0 00:	00 00	00:00	00:00	02:0
5.	Code Testing	×	Bugfixing	~		Billable	~	1:45	00:00	00:00	00:0	0 00:	00 0	00:00	00:00	01:4
+	Add Row		Total					09:46	00:00	00:00	00:00	00:0	00 0	0:00	00:00	09:4





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.

👔 ZY134 Rebecca Biaggio 🗸	< 08-Jan-2019 - 14-Jan-2019 >		Log Time 🗸 🛛 🏹
Jan 9, 2019	07:00		📥 Import
Deep Analysis + DAP	Billable 02:00	0	i±i Export
Prototype Submission * DAP	Billable 05:00	0	
🔲 Jan 10, 2019	00:00		
Prototype Submission + DAP	Billable 00:00		

### 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

Services	Time Logs	0	ZY198 Christine Spa	lding 🗸		< 09-4	Apr-2019 - 15	6-Apr-2019 >			Log Time 🗸	√ …
ଜ												_
Home	Calendar View	8	Zylker Corporation 🗸	Code Testing	~	Bug fixing	× Wha	t are you working on?	Billable	~	0:00:00	00
8	Timesheets											
Self-service	My Timesheets											
Ba	My Approvals											
Organization	Projects/Jobs											
E Leave	Job Schedule											
ø	Schedule											
Attendance	Java Training											
©	Reports											
Timesheet	Time Log Report											

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



g Time		>
Project Name	Construction	*
* Job Name	Structural Analysis	~
Work Item		
* Hours	Total hours O Start and end to the second	time 🔘 Timer
	8:00 (j)	
Billable Status	Billable	~

**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** 

		ZY198 Christine Sp		< 12-May-202	0 - 18-May-	2020			Log Time 🗸 🛛 💎 🚥
Calendar View		Select Project 🗸 🗸	Select Job	✓ What are you working on?			Non-billable	~	00:00:00
Timesheets									
Projects/Jobs		May 14, 2020				12:00			
Job Schedule		Booklet design - Book	lat		Billable	12:00	0		
Reports	144	BOOKIET DESIGN - DOOK	Jet.		Dinable	12.00	×		
Settings									

- 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



List View	5.43								
Calendar View	Tue	•	Wed	Thu	Fri	Sat	Sun	Mon	Total Hours
Timesheets									
Projects/Jobs	5	+	6	7	8	9	10	11	
Job Schedule					Bookle 06:46				06:46
Reports					Early May ba				00.40
Settings					I say the same				
	No.		1992	2.2	1.02			2223	
	12		13	14	15	16	17	18	
				Bookle 12:00					12:00
	19		20	21	0	23	24	25	
	Create	03:00	Create 03	3:00 Create 03:00	Medica 10:00			Spring bank h	020007
	Create	02:00		4:00 Create 02:00	Create 01:00				38:00
	create	1 more		more 1 more					
	26		27	28	29	30	31		
									00:00
									00.00

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

Period	This Month 🐱	
Employee	ZY198 Christine Spalding 🗸	
Clients	All Clients	
Projects	All Projects	
Jobs	All Jobs	
Billable Status	All ~	

- 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.

UTIN- Carisi	tine Spalding = 01-May-2020 - 31-May-2020		
Timesheet Name	Timesheet (01-May-2020 - 31-May-2020)		Time Logs to be submitted
Description		O Billable	12:00
Attachment	Upload from Desktop or Zoho WorkDrive or Other		
Project Name	Booklet + Dias Pvt Ltd		
Choose Approver	Select Approver		
Job Na	ame		Hour(s)
May 1 O Fri Ma Holl	<b>y Day</b> Iday		
May 8 O			
Holi	ly May bank holiday iday		
May 14 O			
Bookle	et design	Billable	12:00
May 25 O			
Spr	ing bank holiday		

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**

General Settings		
Time Log Settings :		
Time Log View	Daily	~
Log time using	<ul> <li>Total hours</li> <li>Start and end time</li> <li>Timer</li> </ul>	
Timer Edit Permission	Self	~
Show Time Log Location	🗿 Yes 🔘 No	
Restrict the log time based on the estimated hours	O Yes O No	
Maximum billable log hours per day/week	🔿 Per Day 🔵 Per Week	<ul> <li>None</li> </ul>

### 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 attendance hours		
Restrict time logs with duration 00:00		
Restrict time log(s) for	Future Date(s)	
	Weekend(s)	
	Holidays	
	Unpaid Leave	
	Paid Leave/Compensatory Off	

### 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:

eneral Settings	
Restrict time log entries if	Time log date is not within Job's start date and end date
	$\hfill\square$ The present date is not within Job's start date and end date
	Note:
	This setting is applicable only when start date or end date of Job are configured. Click here to know more.

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

Time entry overlap	<ul> <li>Allow</li> <li>Overlapping entries will be allowed</li> </ul>
	<ul> <li>Warn but allow</li> <li>Overlapping entries will be allowed with precautionary message</li> </ul>
	<ul> <li>Restrict</li> <li>Overlapping entries will not be allowed</li> </ul>

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.



General Settings			
Default Billing Status	Billable 🗸		
Default Work Items	Content creation		
	Editing	E3 E3	

### Time Log Field Customization

Fields	Show	Mandatory
Client Name		
Project Name		
Job Name		
Work Item 🖋		
Billable Status		
Description		
Hour(s)		

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	Self ~
Allowed period for timesheet	Week 🗸
	Restrict submission within day/range
	From Friday v of current week v
	To Monday $\checkmark$ of next week $\checkmark$
imesheets with overlapping dates	Restrict
Time logs without Clients	Exclude

### 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 (j)	Enable      Disable
	Per Day 08:00 hours
	Per Week 40:00 hours
Maximum hours criteria for timesheet submission $\Phi$	Enable O Disable
	Per Day 10:00 hours
	Per Week 50:00 hours
Display rate per hour for	🔽 Admin
	Z Approver
	Reporting Manager
	Employee
Approver can edit time logs during approval	Allow (i)

### 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.

Payroll Calcula	tion Settings :	
	Include Paid Leave	
	Include Fuld Ecuve	

### **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.

General Setting	S	
Attendance Inte	gration Settings :	
Push Timer Entr	ies to Attendance	

### **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 <u>automation features</u> in Zoho People.





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	Home page video URL:	
Profile	Video link	
Forms		
Checklist		

**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



Flow Name	Onboarding 2019 - Q1	
Applicable Location(s)	x Seattle X San Jose X California	
Applicable For	Role 🗸	
Applicable roles	× Manager × Team Lead	
Expiry	10	days from Date of Joining.

### 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.

< Employee onboarding	~	Applicable for : All	
Welcome aboard		Home page video URL:	
Profile and other forms		https://drive.google.com/open?id=1UCbm59QUIRI1QRAffjYK6bn-nrhrkw2-	
Documents and policies		Description:	
Team			
Objectives		Welcome aboard! We wish you a successful journey in our organization.	
Company information			
Training		Welcome feed:	
		Welcome feed: Post to	
Training Checklist			
		Post to	
		Post to Department	Insert
		Post to Department Available Merge Fields Select Field Field Value	
		Post to Department Available Merge Fields Select Field Field Value System Fields  FEED USER MENTION  SiffEED USER MENTION]	

**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.

Employee onboarding ~		Applicable for : All 🖌					
Welcome aboard		Description:					
Profile and other forms		We'd like you to fill in your pr	ofessional and per	sonal information here.			
Documents and policies							
Team	•	Choose forms:					
Objectives		Form		Mandatory			
Company information							
Training		ii Employee	~		+	۵	
Checklist		II Company Policy	~		+		

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.

Welcome aboard	Description:			
Profile and other forms	Complete these cour	ses to get a head start in your care	er.	
Documents and policies				
Team	Add Course			
Objectives	Add Course			
Company information		Privacy	×	
Training			Mandatory Course	
Checklist		Self Paced Learning		
		Security	×	
	Noit.	Description		
	* 🎮 🗐 .	Self Paced Learning	Mandatory Course	

**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 Form View			
Onboarding Portal : newcandidate201	9	Add 🗸 Import Candi	late 🗸
□ Basic information ↓	Status	Candidate	
Annie Peace, CND31 annie.s@gmail.com	Active	Multiple Candidates	
Bhagath B, CND33 bhagath.b@gmail.com	Active	A	
Karen Will, CND32 karenwill5@gmail.com	Active	8	
Susan Bones, CND34 susanbones@clearmail.online	Active	æ	

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

Setup	Total U	isers: #			Add 🗸 Import 🗸 🖸	Sync 🖓 🖞 🍘
General	В	asic information ↓	Date of Joining ↓	Role(s)	Invite User	
Organization	0.0	Ann Blake, HR205		Team member	Invite Multiple Users	-
		blessyblake@gmail.com			Add User Directly	⊠ ®
Employee profiles	0	Randall Gladstone, HR204	01-Jan-2018	Team Lead	Add Multiple Users Directly	8 B
Departments		randali@zylker.com			i	0 W
Designations		Navaneeth Suresh, EU105		Admin	Active	e B
Locations		admintrial@zytker.com				6 (V
Groups		Sandra Marks, EU104		Admin	Active	8 B





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

Account Details	Basic information	
Employee ID	1223	
	Last Employee ID HR205	
First Name	Susan	
Last Name	Bills	
Email address	susan.bills@zylker.com	
Trigger Onboarding		

### 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**.





vices	ndidate	Onboarding	
ଳ	boarding Flows	Forms	
B service	ttings	Add and customize forms for use in the candidate onboarding flows.	
T ave icker		+ CA	
D me oker		Add New Form Candidate	
큀 xdance			
1 Interview		Customize e-mail template This e-mail template is used to notify the start of the onboarding process for candidates and employees.	
3		Welcome template for Candidates	
eq MS		Welcome template for Employees	() ()
<b>≫</b> arding		Onboarding Reminder	
fice		Configure automatic email reminders	
liness		Candidate onboarding reminder	

### 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



Edit-Employee Onboar	ding lemplate			×
Mail Alert Name	Employee Onboarding Template			
Message				
From	Person performing this action $$ $$ $$ $$ $+$		+	
Fo +	Form fields Add Email ID ×	8		
Subject	Employee onboarding	B		
Message	Edit Template			
Hi <b>\${FirstName}</b> , Greetings from \${compare Click here to start onboa				

- 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.



Send reminder after	0		day of initiating onboarding	
Time of execution	09:00 AM	~		
Frequency	Once	~		
Message				
From	noreply@zohopeople.com	~	+	
To 🔻	Form fields Av Email ID ×	ld		
Subject	Reminder to complete your onboarding pro	. 6		
Message	Edit Template			
Hello <b>\${First_Name}</b> , You are yet to complete you Click here to complete you	our onboarding process with \${companyName}. Ir process.			
If you have any queries, ple	ease reach out to \${CandidateHRPartner}.			
Wishing you all the best! \${Person performing this a	action}			

### 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

Device registration form	6	Onboarded 3 Onboarding in progress		Add 🛩 Export Report 🗸 🕇
Candidate				
Onboarding Flows		Candidate name	Onboarding Status	
Reports	12	Sarah Carlton	Completed by carididate	
Employees		-		
Candidatus	<b>C</b> 1.	Sasi Rekha	0/3Completed	
Settings	0	Liza Rover	1/2Completed	

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

zohoonboarding@gmail.com	Mark as completed Reopen
Onboarding Tasks	2/2 Completed
V Profile	
<ul> <li>Documents and policies</li> </ul>	
Onboarding Documents	
Offer Letter - CND122.pdf	Accepte
Company Policy	
Terms & Conditions of employment.docx	
Profile and other forms	
Candidate	

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





	Onboarding Task Reopen	×
То	Sarah Cariton	
Cc		~
Subject	Enter the missing details in the onboarding process.	
Message		
B I Ų ∓ 1	12 - A ショーニー 三 四 ク 知 工 居 ③	
	n Intering some important details in the onboarding process. Sess and complete your onboarding.	
٥	Upload from Desktop or Others	

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

Select fields of the Employee Form to map w Candidate Form.	vith fields of the		hat needs to be converted into fields of the E	nployee Form.
✓ Basic Info	5	V Basic Details		
Nick Name		EmployeeID	Candidate ID	~
		First.Name	First name	~
Appraisal Facilitator	2	Last Name	Last name	~
Offer Letter	12	*Email ID	Email ID	~
Reporting To	51	Photo	- Select -	~
Secondary Reporting to	5	Password	<ul> <li>Use auto generated pass</li> </ul>	
Date of joining	5	T GOTTON G	<ul> <li>Select a field from Candle</li> </ul>	
Probation status	5			
Date of Confirmation	5			
Department	22			

- 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.

File Name 🗧	Shared To	Folder	Modified On 🕴	
Leave policy	All	General	23-Apr-2019	
Vacation policy	All	General	15-Apr-2019	
Maternity policy	All	General	15-Apr-2019	
Paternity Policy	All	General	15-Apr-2019	() ± 💮 🖉 🗐
Organization Files			List	Folder + Add 7
Organization Files			List	Folder + Add 7
Organization Files	General	Policies	List	Folder + Add 7
	General	Policies	List	Folder + Add 7

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

dd Personal File			×
* File	EPFScheme.pdf 🛞	()	
File Name	Provident Fund.pdf		
Description			
	<u></u>		

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.





Specify who can view the	personal uploads tab	
Roles	Selectroles	~
Employees	Select employees	~
All Employees		
Specify the maximum limi	it of personal uploads per employee	
File limit	5	
Employee Files		
Specify who cannot view	the employee files tab	
Roles	Candidate ×	~
Employees	Select employees	~
All Employees		
All Employees File View		
File View Specify the default type o	of view of organization and employee files	
File View	of view of organization and employee files	
File View Specify the default type o List O Folder	of view of organization and employee files	
File View Specify the default type o List O Folder Reportee Files	he files of all reportees, both direct reportees and thei	r reportees will be viewable. All Reportees files can be viewed under
File View Specify the default type o List O Folder Reportee Files By selecting this option, t	he files of all reportees, both direct reportees and thei	r reportees will be viewable. All Reportees files can be viewed under

### 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.

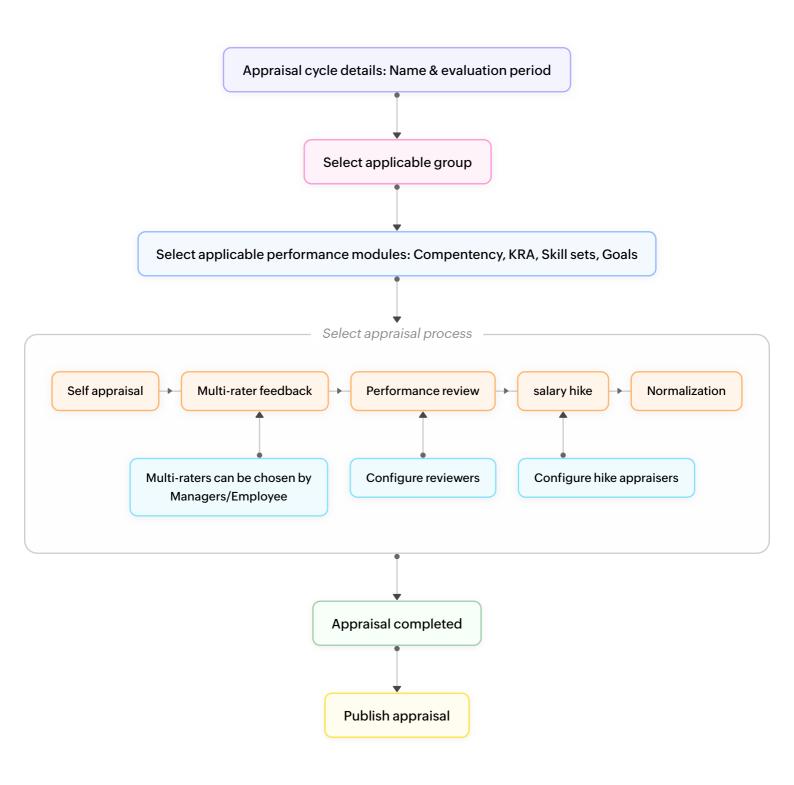
### Summary:

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



# 142 PERFORMANCE MANAGEMENT

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



# 143 PERFORMANCE MANAGEMENT



### **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

ZY134 - Rebecca Biaggio HR Manager - Recruitment - Dept of Human Resources	0	<b>5 1 2 2 3 3 3 4 5 5 1 1 1 1 1 1 1 1 1 1</b>			
KRA SkillSet Goals Feedback Summary					0
Goals				+	Add Goals 🛛 🖓 🚥
Conduct five campus recruitments in Q3      Overdoe - 60 Day(s)	<b>50%</b> of Weightage	-	20%	E	+ Add Job
Cover south zone universities 50 Hrs 0 Mins	0				
<ul> <li>Increase campus recruitment drives by 10% in Q1 of 2019.</li> <li>Overdue - 13 Day(s)</li> </ul>	<b>20%</b> of Weightage	_	- 50%	E	8
Decrease TOT from selection to hiring by 10% in Q1 - 2019. *	<b>30%</b> of Weightage		50%	E	
Reach target number of recruitments      Overdue - 21 Day(s)	<b>5%</b> of Weightage	(r)	- 95%	(E)	0
Screen 50 candidates for Q2 · Overdue - 66 Day(s)	<b>20%</b> of Weightage		- 45%		
Reply to pending requests	<b>10%</b> of Weightage	_	28%	(E)	0

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



15.1.1		
oal Details		
Start Date	29-Nov-2019	
Goal Name	Complete second round of interviews	
Due Date	31-Dec-2019	100 m
Priority	Medium V	
Description		
Weightage	40	
Weightage	40	

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

General Settings			
Goals Access			
Employee Form Field	Mentor	~	
	The user in the fi	ield that is s	lected here will have the permissions that you choose for Goals.
Permission	View Ad	dd 🖂 Edit	Delete

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

ZY198 - Christine Spalding HR Head					3	• <del>•</del> •	1
Skill Set Goals Competency Feedback Self Appraisal Multi-	rater Review Select	ion					0
Goals					+ Add Gos	ils.	V
Vendor negotiations • In-Progress:	15% of Weightage	-	12%	P	u <sup>p</sup>		
Training calendar + in Progress	<b>10%</b> of Weightage	-	10%	Ð	<b>9</b>		
Training for sales teams  In-Progress	25% of Weightage	_	30%	E			



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.

	Management Strategy	Market status review	Sales data submission	Prototype submission
Add Jobs	02-May-2018 to 2 <sup>4-</sup> May-2018 130 to -0 Mins	2314 aMins	01-Aug-2018 to 13-Aug-2018 0 Hrs 0 Mins	06-Aug-2018 to 22-Aug-201 0 Hrs 0 Mins
Stats reports	Reports	Banner update	DAP Core	Start & End (Due) date c.
06-Aug-2018 to 17-Aug-2018 0 Hrs 0 Mins	09-Aug-2018 to 15-Aug-2018 0 Hrs 0 Mins	- 0 Hrs 0 Mins	01-Aug-2018 to 06-Aug-2018 0 Hrs 0 Mins	15-Feb-2018 to 17-Feb-2018 0 Hrs 0 Mins

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.

ZY198 - Christine Spalding HR Head				<mark>گ</mark> 3	о Ф	1
Skill Set Goals Competency Feedback Self Appraisal 1	Multi-rater Review Selection					0
Goals				+ Add Goal	7	7
Vendor negotiations * In-Progress	15% of	- 12%	Ø	. <b>P</b>		
Training calendar • In-Progress	10% of Weightage	- 10%	1.00	+ Add Job	s	×
Data Gathering _ Estimated: 3 Hrs 40 Mins	Logged: 5 Hrs 4 Mins		0			
Project Analysis _ Estimated: 10 Hrs 0 Mins	Logged: 0 Hrs 0 Mins		0			1

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



	Bomain	×
	Add Skills	
Technical writing		
Note: Add comma to se	eparate Skills	

- 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

ikill Set(s) based on Designation & Department(s)	Designation & 🗸 🍸 Tag Skill(s)
	Domain
	Designation
	Department
	Designation & Department

- 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%



HP Manager + 4			Note : Total Skill Set weightage limit is 1
× Quality Assurance			
	Q. Search	Selected Skill Set	Q. Search
		skill Set	Weightage
		HR Technology	50% ×
		Recruitment	50% ×
sManagement			
	HR Manager 🛩	× Quality Assurance	Q Quality Assurance   Q Search  Selected Skill Set  Skill Set  Hit Technology Regruitment  Management

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

Domain and Skill Set	Domain	✓ Tag Skill(s)	Ċ.	Skills	Add Skil
Computer languages				Q Search	
0% C#					
0% Javascript				Organizational ability	
Python/Django				Planning	
0% Ruby on Rails				Problem solving	

- 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.

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## 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

										_										
Skills	Experie	nce					vels													
× Market Research × Market trends analysis	From	~	- To		~	0	0	00	0							I	Searc	h	Reset	
Select	~ @	A	A	0	8	0	0		0	0	0	0	0	•	0	0	-			1
0000		1		•		•	-		0	100	0			19	•		100	4.5/	1	
✓ Angular JS	3			4							4									
√ Go	2		3		4															
<ul> <li>Python/Django</li> </ul>	1			2)																
<ul> <li>Multi-tasking ability</li> </ul>		2)										5			3			2		2
V Written expression										2)										
<ul> <li>Problem solving</li> </ul>					0				2)										0	

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

KRA		
Y	X	X
ė	<b>*</b>	ė ė.
Administrator	Self	Reporting To

### 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

	Besignation V	×
	Add KRA	
	Title	
	Business Acumen	
	Description	
	A keen understanding of the current business trends	
nt		
ton		
	Charter Consul	
	Submit Cancel	



# 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

KRA(s) based on Designation	Designation 🗸	Tag KRA	E
All	Designation		
70% Training	Department		
Finance Analyst 💉	Location		
	Designation &		
0% Market Insights	Department		
20% Development			

3. Select the designation or department

< Tag KRA		
Department × Dept of Human Resources	N	ote : Total KRA weightage limit is 100%
Choose KRA 🕘 Q. Search	Selected KRA	Q. Search
Z Employee Relations	KRA Employee grievance handling	Weightage
Managing Employee database	Employee Relations	50% 🗙
Employee grievance handling		
Business Development		
Recruitment and selection		
Performance Management		

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.

KRA vs Goals Skill Set Competency Feedback Self Appraisal Multi-rater Select	tion				G
KRA				Tag KRA	V ••
Recruitment Strategy Formulate organization's staffing strategies for current and future demands.	30% of Weightage		[	+ Goals	
Hiring and onboarding of sales team for the Middle     S%     S%	15% of Weightage		R		
Talent Development Needs Analysis Identify Talent Development Needs	30% of Weightage	1		+ Goals	2
Training for sales teams      Overdue - 22 day(s)	25% of Weightage	-	12		
Training calendar • In-Progress	10% of Weightage		ß	2	
Benefits Programs Vendor Analysis Select and audits vendors of outsourced benefits programs	15% of Weightage			+ Goals	
O Vendor negotiations · In Progress	15% of Weightage		12		
Launch new initiative for improving performance Introduce a climate that rewards excellent group and individual performance.	25% of Weightage	P		+ 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.

$\bigcirc$
$\langle \gamma \rangle$
$\mathbf{V}$

< V198 - Christine Spalding HR Head					மீ 3	0
KRA vs Goals Skill Set Competency Feedback Summary Self Appraisal Review						0
KRA					Tag KRA	¥ ***
Recruitment Strategy Formulate organization's staffing strategies for current and future demands.	30% of Weightage			+ Goals	0	
Talent Development Needs Analysis Identify Talent Development Needs	30% of Weightage	ø		+ Goals	🥖 Edit 🔗 Map G	oals
Training for sales teams - Overdue - 115 day(s)     30%	25% of Weightage		H		Delete	
Training calendar • Overdue - 16 day(s)	10% of Weightage		X	2		

**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** 



y Review	Performance Modules		
am mates ill Set Matrix	Module Name	Module Display Name	
nployee Salary			
ulti-rater Review	Ø Goals	Goals	
pals			
ports	Feedback	Feedback	-0
ttings			
Appraisal Cycle	📑 Summary	Summary	-
Notifications Feedback			
-eedback 5kill Set	💮 Skill Set	Skill Set	
<ra< td=""><td>war</td><td></td><td></td></ra<>	war		
Competency	RA KRA	KRA	-
Potential		NNA.	
Summary			
Performance Modules	KRA vs Goals	KRA vs Goals	B
mport Data			
General Settings	邃 Competency	Competency	
	Salary	Salary	

# 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

Competency(s) based on Designation	Designation V Tag Competency	Competency	Add Competen
Finance Analyst		Q Search	
30% Technical Expertise			
35% Analytical Thinking		Business Strategy	
45% Change Management		Change Management	
HR Manager		Decision Making	
0% Oral Communication		Analytical Thinking	
10% Leadership		Forward Thinking	
30% Decision Making		Technical Expertise	



### 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

Designation HR Manager - Learning and Development ~	Note	e : Total Competency weightage limit is	100%
Choose Competency  Q Search	Selected Competency	Q Search	
Written Communication	Competency	Weightage	
Oral Communication	Active listening Oral Communication		××
Problem Solving	Written Communication	30%	×
Conflict Management			
Interpersonal communication			
Active listening			

#### 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



Ay Review	< 💓 ZY148 - Aaron Weisley	🖒 🖓 🧟 1 0 0
eammates		1 0 0
Peers View	Skill Set Competency Feedback Summary	0
Appraisee View	C	The Computance
Salary Hike	Competency	Tag Competency
Hike Approvals	Active listening	1000077527113 VY
Multi-rater Review A	Active listening	60% of Weightage
Multi-rater Review F		
Multi-rater Review S		
Extend Review		

- 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.

My Review	Feedback				
Teammates					
Peers View	Feedback Type				
Appraisee View	recuback type				
Salary Hike	X				
Hike Approvals	· · · · · · · · · · · · · · · · · · ·		494		
Goalsheet Approval	-				
Multi-rater Approvals	Reporting To	Peer-to-Peer	360 Degree		
Multi-rater Feedback					
Multi-rater Selection					
Review Extension	Feedback Categories				
Skill Set Matrix		1.00	04	()#	0=
Continuous Review		0	~	6	
Employee Salary	•		1	۲	
Multi-rater	Positive	Neurthee	Training	Oliservation	Reword
land deserves					
Goals					
Reports					
Settings	-				
Appraisal Cycle	9	+			
Performance Modules	Improvementa				
Continuous Review					
Notifications					

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.

	<ul> <li>(a)</li> <li>(b)</li> <li>(c)</li> <li>(c)</li></ul>	Ø			
- Faadhaala					
a Feedback					
ect	~	Anonymous	Submit	Cancel	
	lect				

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.

Summary	+ Add
Questions	Status
Key activities that your reportee is responsible for and their performance in each.	
Do you recommend promotion for your reportee?	
How was your reportee's overall performance during appraisal period?	-0
Do you have any suggestions for your reportee's performance to improve?	
What are the key areas your reportee is excelling in?	-
How would you rate your reportee for teamwork?	
What are the key concern areas for your reportee?	-

#### Accessing summary

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



ZY134 - Rebecca Blaggio HR Manager - Recruitment - Dep	ot of Human Resources			11 3	0	
KRA vs Goals Skill Set Feedback	Summary Self Appraisal Multi-Rat	ter Selection	Review			(
Select +	~	0				
Key activities that your reportee i performance in each.	Subm s responsible for and their	lt <u>Mar</u> 20				
Needs to be more up-to-date with curre	ent technology	Mar				
How was your reportee's overall p period? Yes, her performance was above averag		19	How would you rate your reporte Great team player	ee for teamwork?		
19 March 10:57 AM			19 March 10:57 AM			

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

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* Name of the Appraisal	Appraisal for HR - Q3 2020	
* Appraisal Cycle Period	01-May-2020-31-Oct-2020 🛅 🛈	
Description	Q3 2020 Appraisal	
Guideline Document	Upload from Desktop	0

4. Upload any guideline documents if necessary

* Process Period	01-Aug-2020-30-Sep-2020 📋 🛈
Self Appraisal	C Enable
Self Appraisal Period	01-Aug-2020-15-Sep-2020 👜 🕕
Self Appraisal Template	Upload from Desktop
Multi-rater Feedback	Z Enable
Selection Period	01-Sep-2020-20-Sep-2020
Feedback Period	01-Sep-2020-30-Sep-2020
Add reportees as Raters by default	Enable
Gerdare	
Raters selected by	Employee / Reporting Manager
	Employee / Reporting Manager
Raters selected by	
Raters selected by	1     -     3       Hide (Raters selected by the Reporting Manager will be shown as Anonymous)
Raters selected by No.of Raters	1       -       3         Hide (Raters selected by the Reporting Manager will be shown as Anonymous)         Allow Raters to view Self Appraisal

- 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



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Nodule(s) to be included					
	Module(s)	Goals	KRA	Competency	Review Questions
	Self Appraisal	0	0		
	Rating	22			
	Comment	2			
	Enable module sele Select the modules to I are selected, only the or rater Review feedback	be enabled for each f chosen modules for e	Aulti-rater Review	v type. When types	C
	Module(s)	Goals	KRA	Competency	Review Questions
	Multi-rater Review	C	C	0	
	Mentor	0	C		0
	Peers	C		•	
	Junior	0	C	3	
	Senior	C		0	•
	Manager	•			
	Rating				
	Comment			2	
	Module(s)	Goals	KRA	Competency	Review Questions
	Reviewer	C		C	C
	Rating				
	Comment	2			
Set Module Weightage	Enable				

Date of Joining	◯ Until ◯ From & To S Months
Location	All Locations
Role	All Roles
Department	× Dept of Human Resources
Designation	All Designations
Custom Date Field	Select 👻

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.

Chaose Dating Time	
Choose Rating Type	Custom 🗸
Cat Danas	
Set Range	0 - 10
Set Mandatory	Rating Comment
Set Manuatory	
Minimum Comment Length	Characters

- 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.



ng and Score Range			
	automatically in the review form base nually. To restrict the manual edit, en		nge. However, the
	Lock Rating		
	+ Add rating		
	Outstanding	8.1 - 10.0	# ×
	Excellent	6.1 - 8.0	/ ×
	Satisfactory	4.1 - 6.0	e ×
	Needs Improvement	2.1 - 4.0	# ×
	Unsatisfactory	0.0 - 2.0	/ ×

- 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

Reporting To	~	Single Level	× =
1 Level(s) of Reporting To			

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

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Review Approval Configuratio	n,	
Review Approval	Z Enable	
	Review approval for only final level review record.	
	Click here to customize the Review Approval template.	

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

Publish Method	O Publish Manually O Publish Automatically	
Auto publish date	02-Nov-2020 12:26 PM 📋 🛈	
Fields to be published	× Rating × Revised CTC	
Publisher(s)	x Admin x Reporting Manager x Finalizer	(j)

- 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

$\bigcirc$	
<b>K</b>	
$\mathbf{\nabla}$	

Appraisal Cycle				+ Add 💿
Name of the Appraisal 🕴	Manage Appraisee	Created On	Status	
Appraisal for HR - Q3 -2020	26	02-Sep-2020	Start	
Appraisal for HR - 2020 (Clone)	26	26-Aug-2020	Started	
Appraisal for HR - 2020	28	23-Jun-2020	Started	
Appraisal FY 2019	2	20-May-2020	Started	
01.2020	- Charles - Char	12-May-2020	Started	

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

( App	oraisee	List Appraisal for 2020	HR-Q3 01-Aug-2020-30- 0 2020	Sep-	Total Employee(s)	📳 Include Employee	Y
	Emplo	oyee	Reviewer 🗸	<b>Review Status</b>			
	4	ZY194 - Anitha Joshi HR Manager - Dept of Human Resources	ZY198 - Christine Spalding	н			
	0	ZY181 - Rodriguez Sue HR Manager - Dept of Human Resources	ZY198 - Christine Spalding	X			
	¢	ZY134 - <b>Rebecca Biaggio</b> HR Manager - Recruitment - Dept of Human Resources	ZY198 - Christine Spalding	X			
	-	ZY107 - Rahul J HR Manager - Dept of Human Resources	ZY198 - Christine Spalding	X			

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



		Q. Search			
	ZY200 - Vignesh TK	Contains	Department	Designation	
	- ZY198 - Christine Spalding HR Head -	Location			
- 🚯	ZY197 - Aditi A - Sales				
- 👔	ZY196 - Rinzee Wilma - Legal				
- 6	ZY195 - Kavin Edwards - Legal				
	ZY192 - Robertson Johnson -				
	ZY191 - Gertrude Williams				
	ZY190 - Jones Terri Debugging & Testing -				
- 6	ZY189 - Brown Eileen				
- 0	ZY188 - Davis Rosemary				
- 🙆	ZY187 - Tara Miller				
• ()	ZY186 - Wilson Carla -				

- 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



			×
Appraisal Cyc	le Period : 01-May-2020 -	31-Oct-2020	
Appraisal Proces	ss Period : 01-Aug-2020 -	30-Sep-2020	
Appraisal Eligibi	lity Date :		
Applicable to L	ocations : All Locations		
Applicable	to Roles : All Roles		
Applicable to Depa	artments : Dept of Human I	Resources	
Applicable to Desi	gnations : All Designations		
Guideline D	ocument :		
Self Appraisal D	ocument :		
De	scription :		
Rating and Score Ran	ge		
Rating and Score Ran	ge Outstanding	4.1 - 5.0	
Rating and Score Ran		4.1 - 5.0 3.1 - 4.0	
Rating and Score Ran	Outstanding		
Rating and Score Ran	Outstanding Excellent	3.1-4.0	
Rating and Score Ran	Outstanding Excellent Satisfactory	3.1 - 4.0 2.1 - 3.0	

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

	ecruitment - Dept of Human			0	
KRA vs Goals Skill Set	Feedback Self Appraisa	al Multi-Rater Selection			0
Year end appraisal	Submission End Date 20-Dec-201	19	Add Self Apprais	al	
		201			

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.

HR204 - Randall Gladstone HR Manager - Human Resources	
KRA vs Goals Skill Set Competency Feedback Self Appraisal Multi-rater Selection	
Appraisal for HR - 2020 (Clone) - Submission End Date 27-Aug-2020 Self Appraisal has been locked	Request to Extend
Appraisal Cycle	Submitted on
Appraisal FY 2019	20-May-2020
	Not Submitted
Year end appraisal	
Year end appraisal Q1, 2020	Not Submitted

## 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

144 - Silver Goodman HR Manager - Dept of Hum	an Resources				0	<del>ф</del>	0
KRA vs Goals Skill Set Feedbac	k Self Appraisal	Multi-Rater Selection					
Choose Multi-Rater		Year end appra	isal 01-J	n-2019 - 01-Nov-2019			$\nabla$
Employee		Туре		Comments	Select	ted By	
ZY148 Aaron Welsley	×	Peers	*	I worked with Aaron for the employee referral program			
+ Add Row							

• 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.

My Review	Choose Multi-rater	Appraisal for HR - Q3 2020 01-May-2020 - 31-Oct-2020	$\nabla$
Teammates	Employee	No.of Multi-rater(s)	
Peers View			
Appraisee View	ZY194 Anitha Joshi	1	
Salary Hike	ZY181 Rodriguez Sue	0	
Hike Approvals			
Goalsheet Approval	ZY134 Rebecca Blaggio	0	
Multi-rater Approvals	TV107 Rahul J	0	
Multi-rater Feedback	and the second se	17 January 18 January	
Multi-rater Selection	HR204 Randall Gladstone	1	
Review Extension			

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

My Review	Multi-rater Approvals	Appraisal for HR - Q3 2020 01-May 2020 - 31-Oct-2020	$\nabla$
Teammates	Employee	No.of Multi-rater(s)	Approval Status
Peers View			
Appraisee View	HR204 Randall Gladstone	1	Approve/Reject
Salary Hike			
Hike Approvals			
Goalsheet Approval			
Multi-rater Approvals			
Multi-rater Feedback			
Multi-rater Selection			
Review Extension			

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



Multi-rater Feedback			Y
Employee	Туре	Appraisal Cycle	Status
HR204 Randall Gladstone	Junior	Appraisal for 2020 (Clone)	Rate Decline
ZY134 Rebecca Biaggio	Junior	Appraisal for 2020 (Clone)	Rate Decline
HR204 Randall Gladstone	Junior	Appraisal for HR - Q3 2020	B

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					
Skill Set Matrix - Organization View access	× All				
Approval for skill tagging and level upgrade	Z Enable				
	Upon disabling approval, considered	latest approve	d level will b	e	
	Click here to configure Skil	ISet Approval			
Mandate supporting document for level upgrade	Z Enable				
Add level descriptions	Enable				
	Descriptions will be show available.	n for skill level	s. If disabled	l, descriptions w	ll not be
	1 Poor				
	2 Average				
	3 Good				
	4 Excellent				
Configure Access permission		View	Tag	Upgrade	Delete
	Employee				
	Employee				
	Reporting Manager		$\checkmark$		

**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.

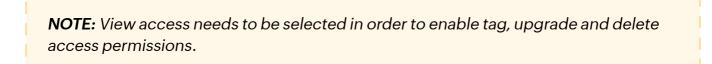
Mandate supporting document for level upgrade: Once this option is enabled, when trying to upgrade the skill level you will get this popup message.

0.	Do you want to upgrade skill lev	el?
Cc	Attach a supporting document	
	Upload from Desktop	
	Upgrade Close	

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.



# 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			
	Anonymous Feedback	Enable	
	Feedback Level	Organization	



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.

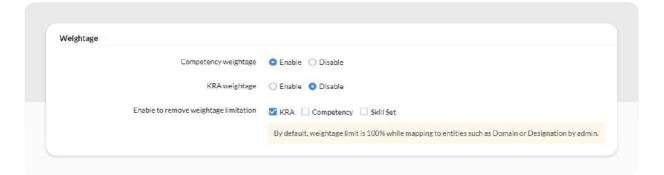
Additionally, let us understand how feedback level and the feedback modules interact.

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 360degree 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.

Goals	
Employee Form Field	Appraisal Manager 🗸 🗸
	The user in the field that is selected here will have the permissions that you choose for Goals.
Permission	🛛 🧭 View 🧭 Add 🛃 Edit 🛃 Delete
	Set Weightage Validation
	💿 Total Goals weightage limit is 100
	Total Goals weightage mapped to each KRA is 100

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.

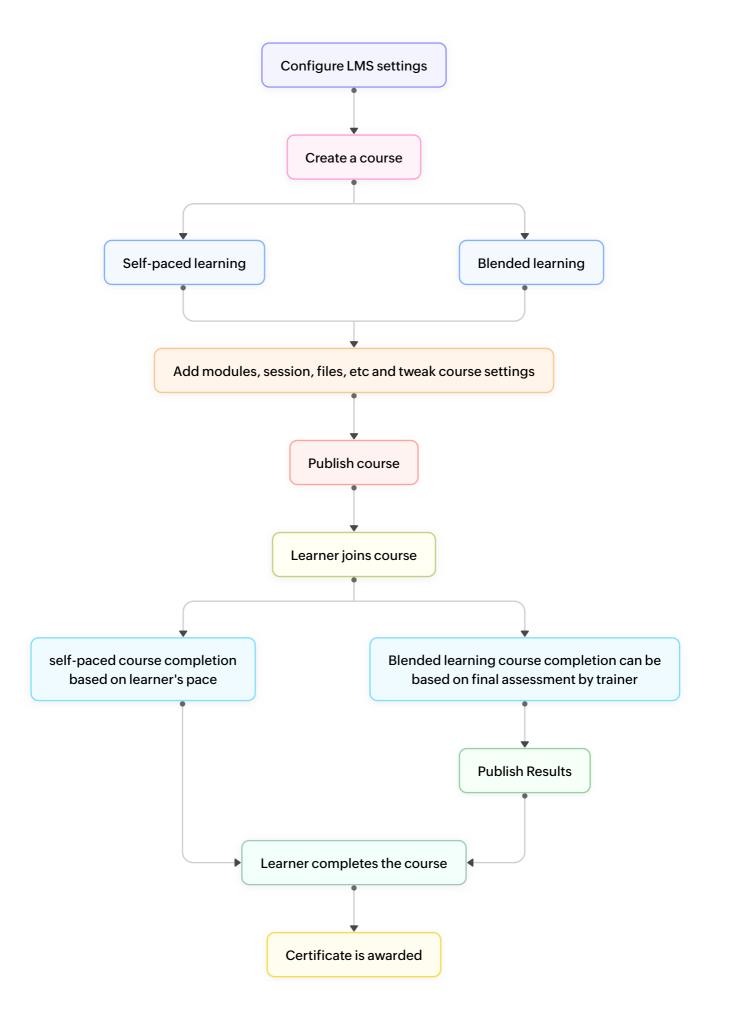
A learning plan can also be created, which can consist of several courses grouped into levels. handpicked for a specific designation, role or employee type.

This is the general flow of LMS

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# **LEARNING MANAGEMENT SYSTEM (LMS)**







# 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.

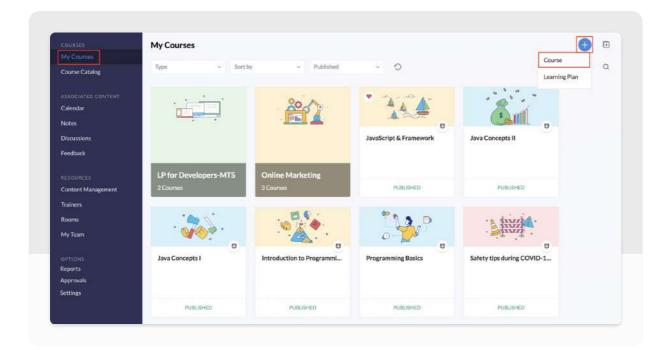
**Online Test:** Create a test that learners can take up online within the Zoho People interface accessible through a link, Offers multiple question types and allows easily adding questions from the question bank too.

**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

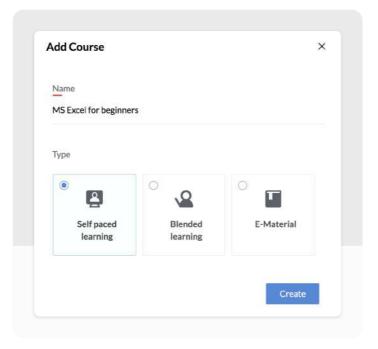








3. Enter a name and select the course type



## 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.

Name			>
Give a title that describes the course	Java Concepts II		
		Basics	
Гуре		Learning Objectives	
elect the type of course that reflects the node, features and options available to the			
earner.	Self paced learning	Applicable to	
		Branding	
Category			
o help users search faster, select the right ategory for this course	Programming & Development ×	Permissions	
		Grade Configuration	
Duration			
The users will get an idea about the time along the course	Days	Certificates	
		Pre course activities	
Course code		Post course activities	
Assign a unique code to refer to this course			
Description			
Provide a description about the course to be lisplayed in the course card			
Course admin			
elect the person who will be the			
dministrator for the course.	ZY198 Christine Spalding ×	ORG POLICY	
		GRADING FEEDBACK DISCUSSIONS	
Save		NOTIFICATIONS	

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.

```
LEARNING MANAGEMENT SYSTEM (LMS)
```

Prerequisite skills Inter the basic level ski	lls needed to be able	to understa	nd and partic	pate in this	course	
с	~	1	~			
ikills you will acquir	e					
Define the proficiency t		re from this	course			
С	~	2	~			
JAVA	~	1	~			

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.

<ul> <li>Multiple Instances</li> </ul>
Adds multiple batches at the defined intervals

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



Batch name		
Level 1		
Start date	End date	
07/05/2020	12/05/2020	
ocation		
Mumbai		~
Capacity		
Minimum	Maximum	
1	10	
Cancel batch if minimum capacity is not met within	days	
Allow waitlisting if maximum capacity is met		

- 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

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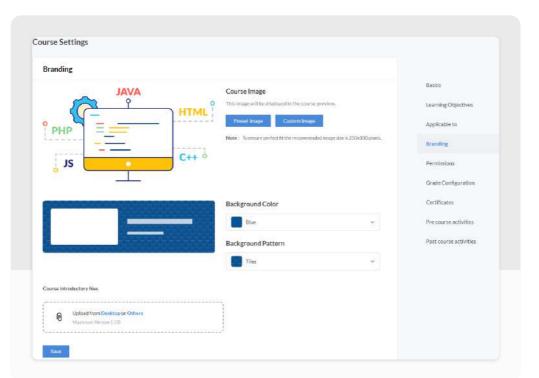
the course through the Course Catalog.

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.

Cours	e Access				En o la to l				
Choose	e if there is dir	ect acces	to the	E	inable to I		ess to course thi be shown in Co		
course plan	or only throu	gh a Learr	ing	Acc	cess anywl	here	) Through Le	arning Plar	n
Rule									
		Accession of		plicable group for			can create mo	e than one r	ule and
each ri	ule will apply	independ	iently wher	n all its conditions	s are met.				
Rule 1									
E	xperience	~	ls	Greater V	2	Years			
		Le		pe a sales executive ace to be able to ac			ore		(+)
C	Designation	~	ls	Sales Exec	utive ×			~	
					Add ad	ditional c	condition (all co	nditions must	t be met)

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

Permissions		
Enroll		
Who can enroll		
Specify if the learner can enroll or their manager enrols them.	S Admin S Course admin Manager S Learner	
Unenroll		
Who can unenroll		
Specify if the learner can unenroll or their manager unenrolls them.	🔯 Admin 🛛 🛃 Course admin 🗌 Manager 🛛 Learner	
Completion		
File, link or content is completed when		
Define when file, link, or content is considered as completed.	File, link, content is marked completed by the learner	8
Course/Batch completed on		
Define when the course/batch is considered as completed.	When the learner marks as complete	
Module completed on		
Module completed on	When the learner marks as complete	

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

```
LEARNING MANAGEMENT SYSTEM (LMS)
```

Select a grading sy	stem for this course		
Total Points	~		
Displays the summation of	scores obtained as the total points achieve	ed by the learner	
OTHER SETTING			
Grade Options			
O Show my grade			
Show my grade and oth	er grade		

- 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.

ourse Settings	
Pre course activities	Basics
	Learning Objectives
Enable Test This test is to evaluate the learner's profidency before starting the course	Applicable to
Grade Category	Branding
Select a grade category If you want to include the test in overall grade calculation. The test will become mandatory if a grade category is selected	Permissions
Pre level assess V	Grade Configuration
	Certificates
Public speaking *** Duration: 10 minutes	Pre course activities
Mandatory	Post course activities
Save	ORG POLICY

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



# LEARNING MANAGEMENT SYSTEM (LMS)

Post course activities	×
	Basics
C Enable Test	Learning Objectives
This test is to evaluate the learner's proficiency after completing the course	
	Applicable to
Grade Category Select a grade category if you want to include the test in overall grade calculation. The test will become mandatory if a grade category is selected	Branding
Post level assess v	Permissions
	Grade Configuration
Formal Communication "" Duration: 10 minutes	Certificates
📷 Mandatory	Pre course activities
When to begin	Post course activities
Immediately after course completion	
O After Day 🗸 of course completion	
	ORGPOLICY
	GRADING FEEDBACK DISCUSSIONS NOTIFICATIONS

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

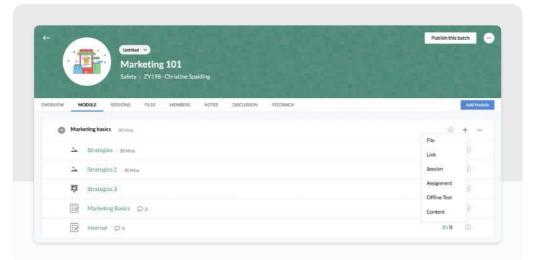
**Course Cost:** Using the Course Cost feature, we can add the various expenses associated with a course such as training expenses, program expenses, etc. To do this go to **Cost** tab and click **Add Expense**. Select a Currency and begin adding expenses based on expense category. Total will be calculated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

Name	Duration (minutes)	Basic Info
Marketing successfully	60	Module Lock Not locked
Description		
		Save

3. Select the Module Lock settings

	Basic Info
Module Lock	
Specify when this module is to be unlocked and made available for learner	Module Lock
	and the second se
Unlocked when previ v	Notlocked
Unlocked	
Lackuntil	
	Save
Unlocked when previous module is completed	Jack V (C )





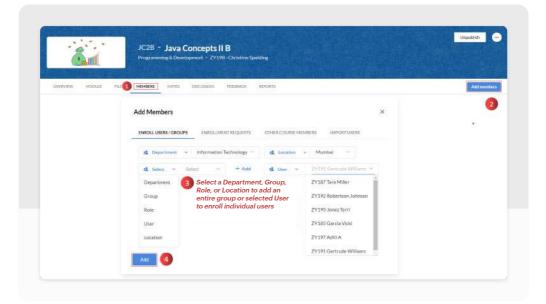
- 4. You can also add relevant files, links, sessions, assignments, and tests by clicking the + icon. All the files uploaded for the courses can be viewed under the *Files* tab
  - To add members to the course, go to the Members tab.
  - To add quick notes, go to the Notes tab. All your existing notes 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



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# 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.

OVERVIEW MODULE	FILE MEMORIES INOTES DISCUSSION PERSEACH REPORTS		Add mente
	Add Members	×	
	ENROLL USERS/ GROUPS ENROLLMENT REQUESTS OTHER COURSE M	EMBLERS IMPORTUSERS	
	SelectAll	1 Requested	
	3 145 - Pedro Martinez		

# 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



# CASE OF A JAYA CONCEPTS III Description D

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**

 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)



LEARNING MANAGEMENT SYSTEM (LMS)

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

	Publish this botch
Basic Computer Knowledge	
1-Admini.LMS APH	
ERVICW MOKAZ SESSORE FILES MEMBERS FROMES DECLOSICH PEEDEMON	Section and
O Dates - 1 sections	@ [+]
Unit Taal 1 Co	Fie Line ()
	Sension
	Assignment
	Celline Test
	Critine Test

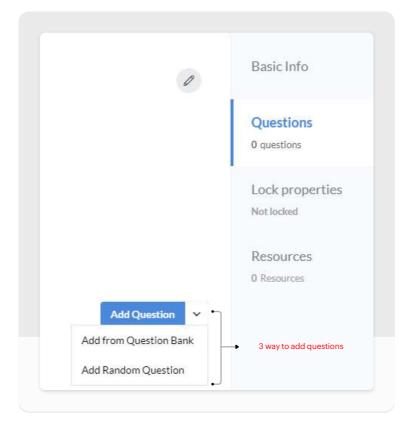
- 3. Now in the Add Online Test window, Enter the required basic info. Name, duration, description and you can also mark the test as mandatory if required
- 4. Use the Maximum allowed attempts option to limit the number of attempts specifically or allow unlimited attempts. You can also specify a marks 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

Name					BasicInfo
Unit Test - 1	Options to time e	entire test or per ea	ach question		(income
					A gamma
Duration				Navigate between th	
for entire test		10		minutes	Lock prop
1	Choose from limited or unlimited attempts.	<b>—</b>			
Maximum allowed at		Questions	per page		Represented to
5		(2) 41 queitio	nne 🛞 Citty dae		
Description					
A very basic test of fu	ndamental computer knowledge		•		
	Choose bet	ween displaying o	one question per page	e or all questions at once	
Mark Test as marsheld re-					
Do out allow text ra-ato	angs, if the user has scored 75 % or above.				
		and the second second			
Duffequetices	Enable to shuffle questions with	each attempt			
Dass merks to itemer	<ul> <li>Enable to shuffle questions with but do not show the correct answers</li> </ul>	each attempt		4	



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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.

Se	elect a question type here	Random Questions G	Benerator
Question Type	1	Question category	General(15) Human Resource(0) Marketing & Sales(2)
I= Multiple	Ŷ		🔄 Admin & Operations(0) 🛛 🛃 IT & Security(8)
Add the guestion here	E Multiple		Customer Support(0)
Question *	te Single	Difficulty Level	🖲 Easy 🕐 Medium 🕐 Hard
Answer *	E Multiple     t: True or False	Mark	Select category, difficulty, marks, type, etc for the questions that are to be randomly added
Choose any one answer to mark as correct asswer for this quastion:     Monitor	$\equiv$ Fill in the blanks	Туре	Single Multiple True or False Fill in the blanks
Keyboard Add the answer here Mouse (check box to identify	<ul> <li>Hotspot</li> </ul>		Match the following Hotspot Dropdown
Speaker	CR Dropdown	Tags	Select ×
Add Choice Question swill be sav Question swill be sav level & tag for future r	ed under the selected category, ise	Questions in selected crit	teria 2 1 ••••••••••••••••••••••••••••••••••••
Question Options Marks awarded for this question Mark	×	Question Bank	Questions can also be imported
Tags		🗌 🚈 Choose a	all input devices [0] marks
		👩 🗉 Which of	f these is not a part of the motherbo 1 mark
computers × •			
computers × •		🔹 🗄 Which of	f these is an output device used for d 1 mariu

# 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**

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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

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	Add Category	
	41	
Category Name	Travel	
Short Description	Queries related to travel	
Applicable Location(s)	All Locations $\times$	~
Agent	Travel	~

- 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.

# **CASES MANAGEMENT**



Post your queries on co	ompensation and benefits				
r ose your querres on a	sinpensation and benefits				
Description 0					
		No description availab	le for this category		
Category Admin 🥒					
	Admin for this categor	y is not assigned yet. This	admin can perform configurati	on and assign	
	Admin for this categor	y is not assigned yet. This agents in this		on and assign	
	Admin for this categor			on and assign	
	Admin for this categor			on and assign	
Applicable Location(				on and assign	
Applicable Location(				on and assign	
				on and assign	
				on and assign	
Applicable Location( All Locations Agents				on and assign	
O All Locations	s)	agents in this	FAQs	on and assign	

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

# Adding an agents

Tag more agents to specific locations.

Agents	Subcategories	References	FAQs	
		+ Add agent		
Select Location	✓ Select Age	nt 🗸	$\oslash$	(
	Trav	а,	8	11

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# CASES MANAGEMENT

# 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

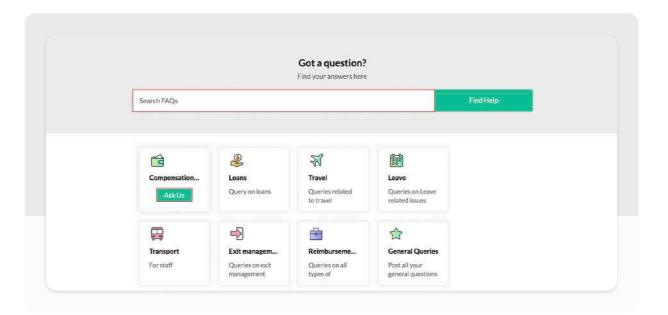
Views	My Cases		▽ …
Unmanaged cases	Case Details	Category =	Status
	Case Decans	CiteBolA +	Status
Open cases	00006 - How is my compensation calculated?	Compensation & Benefits	(Open)
Unpicked	144 Silver Goodman - Today 04:02 PM	Companisation at Benefits	(Open)
Watchilist			
All Cases	CO0048 - Am I eligible for paternity leave?     145 Pedro Martínez - 07-Jan-2020	Leave	In Progress
My Requests			
Categories	O0003 - When am I eligible for a car loan     ZY111 Keb Lisa - 30-Jul-2019	Compensation & Benefits	(In Progress)
Reports	2.1111 NEOLISE - SO-JU-2017		
Requested vs Closed	- 00001 · Health and wellness	Compensation & Benefits	-
Overall Report	C C C C C C C C C C C C C C C C C C C	Compensation & Benefits	(Open)
Escalation report	and the second sec		
Analytics	#00037 - Regarding home loan     ZY198 Christine Spalding - 09-Oct-2018	Loans	(Open)
Settings	211v8 Christine Spalong + 09-Oct-2018		
Categories		122303	
SLA	ZY107 Rahul J - 12-Sep-2018	Loans	In Progress
Notifications			
Workflows			

- 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

Question on 'Insurance		Insurance	>
Priority	Medium 🗸	Insurance cases	
Subject — Description	How many dependents can I add ?	Agent Details	
	$\underline{A}  \mathcal{L}  \equiv \cdot = \cdot \equiv \cdot \equiv \cdot \equiv \cdot \boxtimes \cdot \mathscr{O}  \mathfrak{D}  L_{x}$ an i add to my insurance claim? Can I add parents		







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

Home	My Requests		▽ …
My Requests Views	Case Details	Category	Status
views	00005 - How many dependents can I add ? 144 Silver Goodman · Today 03:21 PM · ©1 days.	Insurance	Open
	TR00001 - What is my per diem eligibility for Europe? 144 Silver Goodman + Today 03:00 PM	Travel International travel	Cancelled
	#00048 - Am I eligible for paternity leave ? ZY 196 Christine Spalding 07-Jan-2020	Leave	(In Progress)

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.

Case Details	Category 👳	Status	Assigned To
- 00004 - What is my per diem eligibility?			
O0004 - What is my per diem eligibility?     ZY134 Rebecca Biaggio - Today 12:20 PM	Travel	Open	( <u>R</u> )
			Me
		4	ZY197 Aditi A
		6	ZY193 Tina smith

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



# **CASES MANAGEMENT**

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		Requestor <b>ZY198 - Christine Spalding</b> © 6870  9546782345	
9	ZY198 - Christine Spalding       14 August 5:35 PM         Question on WFH operations       14 August 5:35 PM         How can I claim my reimbursement for the month of May?       14 August 5:35 PM	Category r Work from home-2020 Status In Progress	*
0	ZY198 - Christine Spalding     14 August 5:39 PM       Status changed from Open to In Progress.	Priority High Source of request Web	~
9	ZY198 - Christine Spalding     17 August 12:31 PM       Please expect a minor delay in response.	Agent Christine Spalding Tasks	
Re	ply Notes	<ul> <li>Post announcement about claims</li> <li>Christine Spalding 21 Aug</li> </ul>	Although
Clair	ming reimbursements online リテムショーニョロタ卵 ム 居 ② Add FAQ Attach FAQ		

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.

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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

evice	•	Ø	ti	2		0	ন্ধ	•
5 Ization 9	Create New Service	Attendance	Leave tracker	Performance	Organization	File Cabinet	Travel	Training
aheets		2)	(8)	☆	☆	0		
ance	Time Tracker	Compensation	Compliances	Asset management	Cab	Group Mediclaim		
₽ mance								
les 								

- 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** 

205



😭 Book a Cab	¢	Service Owner
Description		Christine Spalding
Cab booking		
F	L Maria Tarra	
Forms	Move Form	
+		
Add New 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

Form Name	Cab Registration		
	Cabitegistration		
Form Link Name	Cab_Registration	0	
Description	Fill in your request for cab services		
		1	
Select Form Type	New form from scratch $ \checkmark$		
Auto-numbering	Enable Auto-number		

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.

		0				
Add Field	22			Manage Sections 🗸	±	Form Properties Field Properties
🖚 Single Line	🗂 Multi Line					
☑ Email ID	23 Number	Cab Registration Deta	nils			Form Name Cab Registration
		Added By 🖉		Modified By		Label Name
\$ Currency	Add Notes	Select	ę	Select		Cab Registration
Dropdown	👌 Blood Group	Added time		Modified time		Description
Image	& Phone		鰡		8	Fill in your request for cab services
🗂 Date	fx Formula	Added IP address		Modified IP address		
🐻 Date-Time	& Url					Form Layout
		Added address		Modified address		Single-page Layout
file upload	A Gender					<ul> <li>Multi-page Layout</li> </ul>
.00 Decimal	🖸 Lookup					Validation
Radio	@ Country					Unique Identifier(s)
P/ Desister have	TT Multi solard					Click here to select unique Identifiers
🕑 Decision box	I Multi-select					Custom Validation
						General Configuration
						Enable password protection ①

Learn more about Forms.

# Add permissions to the service

Here, you can add roles and assign specific record, field and action permissions.

Cabs > Cab Registration ~		CUSTOMIZE	PERMISSIONS AP	AUTOM	I		
Roles		Record Permission			ions Field Permissions		ermission
	View	Edit	Add	Delete	Field Permissions	Import	Export
Manager	R	88	R	<b>R</b> 9		×	×
Team Incharge	8	*	8	*	Eol	×	×

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.

	PERMISSIONS APPROV	ALS AUTOMATION		
dd Approval				×
orm Name	Cab Registration	~		
ame of the Approval	Approve cab requ	lest		
riteria				
pprovals Reporting To	~	Single Level	× 🗉 ×	
	Approved / Reject		× ×	

Learn more about Approvals.

# Automate related actions

As a part of the service, you can also configure workflows to automate processes in the service.

Cabs > Cab Registration ~		CUSTOMIZ	e permissi	2000 - 2003 M					
Workflows									+ Add Workflow
Name	Form Name	Execute On	Timed Actions	Mail Alerts	Checklists	Webhooks	Field Updates	Custom Functions	Status
Cab registered successfully	Cab Registration	Create	0	1	0	0	0	0	-0

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

Settings	Book a Cab	0	Service Owner
	Description Cab booking		Christine Spalding
	Forms	Move Form	
	(+)		
	Add New Form		

- 2. Click the gear icon on the top right corner
- 3. Modify the name, icon, and description if needed

Name	Book a Cab	
Description	Cab booking	
Service Owner	(g) Christine Spalding	~
Agent	🛔 ZY194 Anitha Joshi	~
References		
C Attachment	& URL	

- 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.

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# **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:

- 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



# **AUTOMATION IN ZOHO PEOPLE**

4. Give a Template Name - Eg - Probation Confirmation template

* Form Nam	e Employee	~
	Employee	× .
* Template Nam	Probation Confirmation	

5. Click Save

You will be taken to the Zoho Writer page where you can create your template as shown in the below image

FILE Probation Confirm	nation Last edit was a few second	To update this template, go to Tools > Mail Merge > Update Template.	0 0
MAIL MERGE I. SELECT DATA SOURCE Source: Probetion Confirment 2. INSERT FIELDS Search EmployeeID Hist Name EmployeeID Hist Name Department Designation - Advanced Merge Fields (Nex Racced)		1       Image: Constraint of the organization on «Date of joining» and have successfully completed your probation today.         Regards, HR team.	
COMPLETE MERGE     Remove lines if it only has f     without value.     Pravkaw Email Marga			
· Update Templete			

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.





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