



# Employee Information Operations

## What is Employee Information Operations in Zoho People?

Employee information in operations lets you manage employee records, departments, designations, delegations, and exit records. Employees can also add [HR Process](#) requests from here.

Photo	EmployeeID	First Name	Last Name	Email ID	Date of joining	Department	Birth Date
	Z1012	Liam John	Liam John	liamjohn@zyker.com			
	Z1011	Joe Smith	Joe Smith	joesmith@zyker.com			
	Z1010	Rachael	Matthew	rachael.matthew@zyker.com			
	HRM20	Anupriya	Mohan	anupriya.mohan@zyker.com	01-Nov-2023		
	HRM19	Regina	Lee	regina.lee@zyker.com	02-Oct-2023		
	HRM18	Jen	Adams	jen.adams@zyker.com	01-Aug-2023		
	HRM17	Amelia	Brandon	amelia.br@zyker.com			23-Apr-1995
	1244	Tina	Francis	tina.francis@zyker.com			
	1243	Tayloenne	Tayloenne	tayloenne@gmail.com		Media	
	1242	Philip	Jeff	jeffrey.e+test1@zohotest.com			

## What can be done under Employee Information Operations?

- [Userwise operations](#)
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- [Groups](#)  
[Adding a new group](#)
- [Delegations](#)  
[Adding a new delegation](#)

## Userwise Operations

The **Userwise Operations** tab can be used to search and edit employee data for specific employees. Their career history, HR process, and audit history can also be viewed from here.

The screenshot displays the 'User-specific Operations' page for employee HR204-Randall Gladstone. The page is divided into several sections:

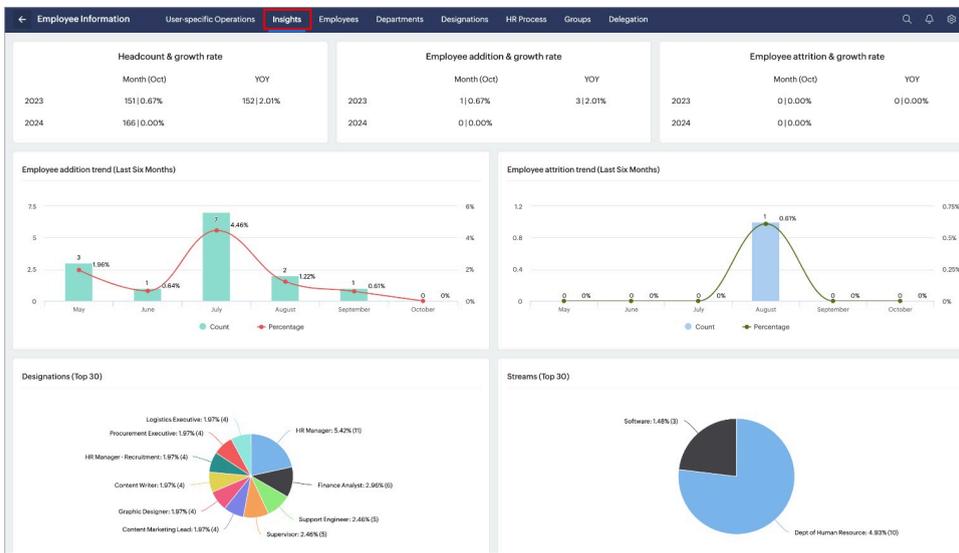
- Profile Information:** A grid of key details including Department (Information Technology), Designation (HR Manager), Location (London), Email address (randall@zyker.com), Work Phone Number (+91 74568932), Seating Location (7CF21- California), Role (Manager), and Extension (1242).
- Summary:** A table providing a quick overview of employee data.

Summary			
Location	London	Designation	HR Manager
Rewards Points	850.00	EEO Category	-
Employee Status	Active	Department	Information Technology
Role	Manager	Streams	-
Work Phone Number	+91 74568932	Mentor	Rinzee - Wilma
Source of Hire	-	Seating Location	7CF21- California
Blood Group Custom	-	Employment Type	-
Collect photo for ID Card	Yes	Date of Relieving	-

## Insights

The **Insights** tab allows you to view the dashboard, which presents employee data in a simple format with various metrics and charts for easy understanding.

The available insights include: Headcount & growth rate, Employee addition & growth rate, Employee addition & growth rate, Employee addition trend (Last Six Months), Employee attrition trend (Last Six Months), Designations (Top 30), Streams (Top 30), Department (Top 30), Location (Top 30), Age, Gender, Experience, and Experience wise exit.



## Employees

The main purpose of the **Employees** tab is to list all the employees in the organization, which includes both employee profiles and users. The administrator has access to edit and view the overall list of employees.

The Employees tab displays a list of employee profiles with the following columns: Photo, EmployeeID, First Name, Last Name, Email ID, Date of joining, Department, and Birth Date.

Photo	EmployeeID	First Name	Last Name	Email ID	Date of joining	Department	Birth Date
	Z1012	Liam John	Liam John	liamjohn@zyker.com			
	Z1011	Joe Smith	Joe Smith	joesmith@zyker.com			
	Z1010	Rachael	Matthew	rachael.matthew@zyker.com			
	HRM20	Anupriya	Mohan	anupriya.mohan@zyker.com	01-Nov-2023		
	HRM19	Regina	Lee	regina.lee@zyker.com	02-Oct-2023		
	HRM18	Jen	Adams	jen.adams@zyker.com	01-Aug-2023		
	HRM17	Amelia	Brandon	amelia.br@zyker.com			23-Apr-1995
	1244	Tina	Francis	tina.francis@zyker.com			
	1243	Tayloenne	Tayloenne	tayloenne@gmail.com		Media	
	1242	Philip	Jeff	jeffrey.e-test1@zohotest.com			

## Public Views and My Views

The dropdown on the left allows you to switch between different views, such as **Public views** and **My views**. Public Views include default options like Employee View, Inactive Employee View, and Master Employee Data, while My Views enables administrators to create their own custom views.

EmployeeID	First Name	Last Name	Email ID	Date of joining	Department	Birth Date
IT24_001	Pedro	Martinez	pedro.m@zyker.com	26-Sep-2014	Information Technol...	
CND193	Tom	Lee	tom@zyker.com			
CND192	Bella	Stone	bella@zyker.com			
CND191	Bruce	Bruce	bruce@zyker.com			
CND190	Frank	Ocean	frank@zyker.com			
CND189	Thomas	new	thomasshelbyk@zyker.com	22-Aug-2024		

## To create a new view

For the administrator to create your own view, click on **Create View**.

EmployeeID	First Name	Last Name	Email ID	Date of joining	Department	Birth Date
IT24_001	Pedro	Martinez	pedro.m@zyker.com	26-Sep-2014	Information Technol...	
CND193	Tom	Lee	tom@zyker.com			
CND192	Bella	Stone	bella@zyker.com			
CND191	Bruce	Bruce	bruce@zyker.com			
CND190	Frank	Ocean	frank@zyker.com			
CND189	Thomas	new	thomasshelbyk@zyker.com	22-Aug-2024		

1. Enter a name for the view.
2. Set permissions for who can access this view.

**Create View**

Specify View Name\*

Set as default view

View Permission  
 Only to me  
 Allow all employees to access this custom view  
 Share this view to specific users, departments, roles or locations

Select Columns

Date of Joining
Reporting Manager
Role
Location
Designation
Address
Nick name
Department
Email address

First Name
Employee ID
Photo
Reporting Manager
Location
Department Name < Department
Seating Location

Criteria  
 1 Department Name(Department) is Human Resources

Total Record Count : 7

3. Select the fields you want to display in the view.
4. Define criteria to specify the exact data to be shown.
5. Click **Save**.

First Name	Employee ID	Photo	Reporting Manager	Location	Department Name	Seating Location	Gender
Pedro	145		Randall Gladstone HR204	California	Human Resources		
Jeenie	Jeenie Smith		Rebecca Biaggio ZY134	California	Human Resources		
Rahul	ZY107		Randall Gladstone HR204	California	Human Resources	India	Female
Rebecca	ZY134		Christine Spalding ZY198	California	Human Resources	England	Male
Rodriguez	ZY181		Christine Spalding ZY198	California	Human Resources	China	Female
Anitha	ZY194		Christine Spalding ZY198	California	Human Resources	Mexico	Male
Christine	ZY198		Jones Terri ZY190	California	Human Resources	CA - 504	Female

6. This is how it will appear after creating your own view, and it will be under **My views**.

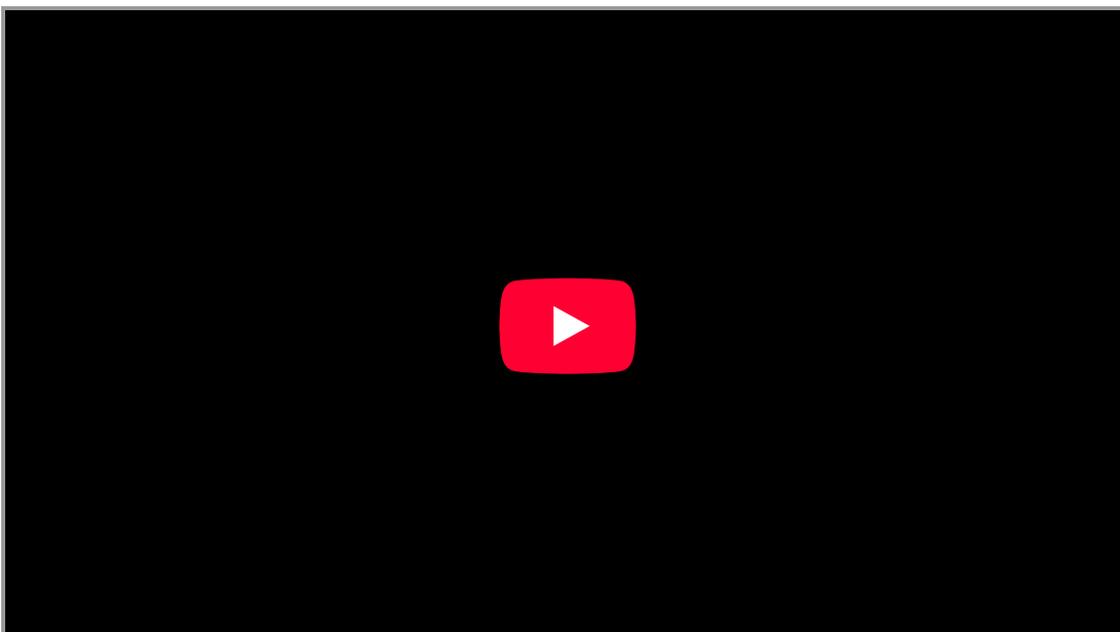
7. Click on **Edit** to make changes to the view, and **Delete** if you want the view to be removed.

Photo	EmployeeID	First Name	Last Name	Email ID	Date of joinin	Birth Date
	Z1011	Joe Smith	Joe Smith	joesmith@zylker.com		
	Z1010	Rachael	Matthew	rachael.matthew@zylker.com		
	HRM20	Anupriya	Mohan	anupriya.mohan@zylker.com	01-Nov-2023	
	HRM19	Regina	Lee	regina.lee@zylker.com	02-Oct-2023	
	HRM18	Jen	Adams	jen.adams@zylker.com	01-Aug-2023	
	HRM17	Amelia	Brandon	amelia.br@zylker.com		23-Apr-1995

Use this dropdown to configure a filtered view of your data, your reportees data, and your direct reportees data.

## Adding a new Employee

Watch our help video on user addition methods:



To add a new employee to your organization, click **Add Employees**.

Photo	EmployeeID	First Name	Last Name	Email ID	Date of joining	Department	Birth Date	Designation
	1120	John	Darron	John@zyker.com	20-Jan-2020	Administration		Logistics Executive
	1119	Michel	Rob	michel@zyker.com	22-Aug-2020		13-May-2012	HR Manager - Recruit
	1117	Rita	Daniel	rita@zyker.com	09-Mar-2020			Procurement Execut
	HRM1	Micheller	Stanley	micheller@zyker.com	09-Mar-2020			Graphic Designer
	4585	Emma	Cartner	emma.cartner@zyker.com	09-Mar-2020		04-Jun-2018	Director of Customer
	4584	Tai	Chang	chang.tai@zyker.com	09-Mar-2020			
	4583	Quinn	Rivers	quinn.rivers@zyker.com	09-Mar-2020			Finance Analyst
	4580	Abigail	Anderson	abigail.anderson@zyker.com	09-Mar-2020		04-Jun-2018	
	4579	Raghav	Rao	raghav.rao@zyker.com	09-Mar-2020		16-Aug-1990	Finance Analyst

Choose from where you want to add employees from.

(If you are a Zoho One user, the administrator will have additional options when adding users to the organization)

1 Selection
2 Sync Users from Zoho
3 Summary

Total License: 7000 | Employees added: 6024 | Remaining: 976

**Invitation**

User with any email can be added. An invitation email will be sent to the user and they will become active once they accept the invite.

**Domain Email**

User with only verified domain email can be added. The user will become active instantly.

**Zoho Mail**

Users from Zoho Mail can be added in Zoho People.

**Google Workspace**

Users from Google Workspace can be added in Zoho People.

**Microsoft 365**

Users from Microsoft 365 can be added in Zoho People.

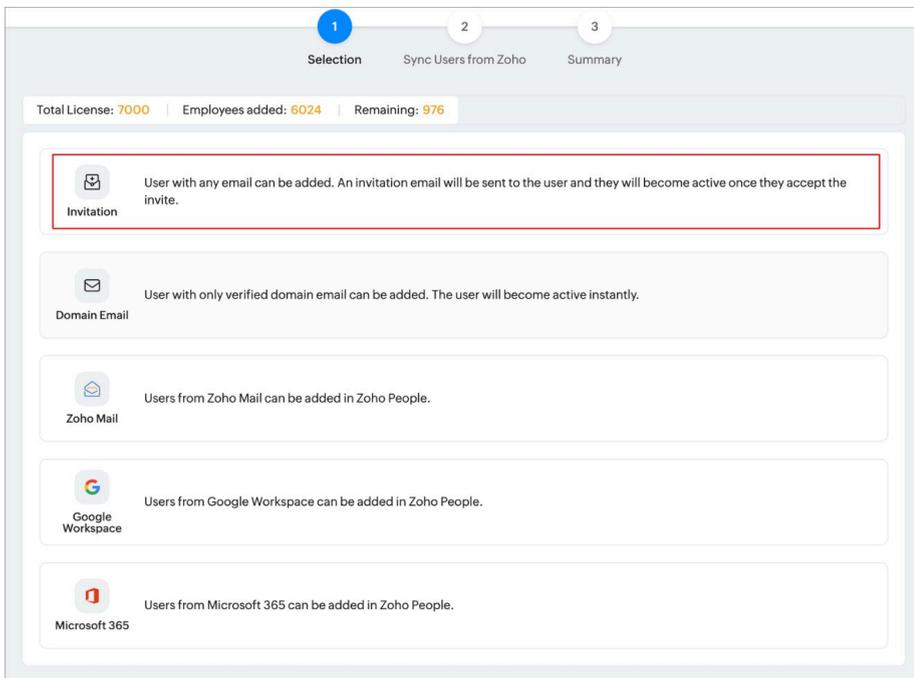
## Inviting Users

Adding users without a verified domain requires an invitation to be sent to the users, who will then have access to their Zoho People account once they have accepted their invitation.

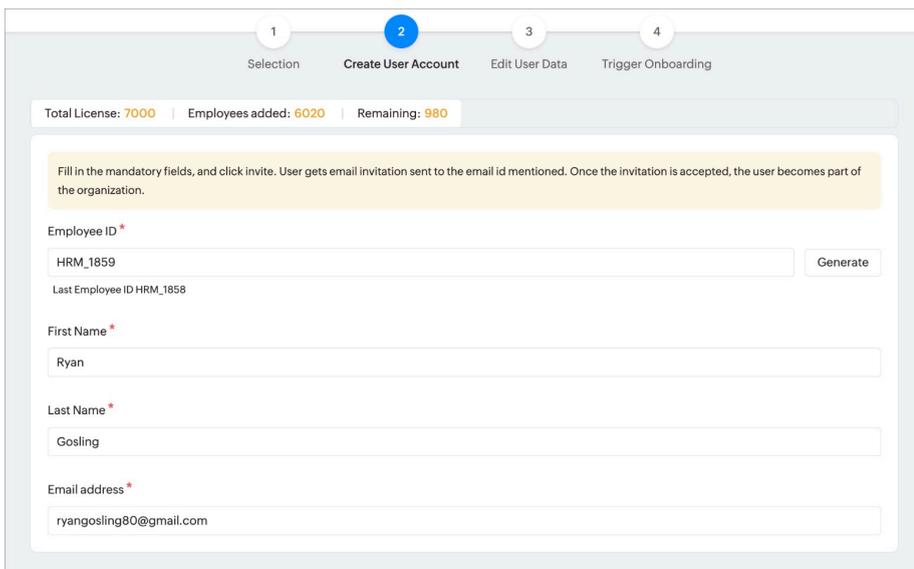
To invite users,

1. From your home page, go to **Operations > Employee Information > Employees > Add Employees**.
2. To invite users through email, select invitation.

<https://help.zoho.com/portal/en/kb/people/administrator-guide/operations/employee-information/articles/employee-information-operations>



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



4. After creating a user account, you can edit or add user data like basic information, work information, hierarchy information, personal details, identity information, contact details, separation information, system fields, work experience, education details, and dependent details.

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

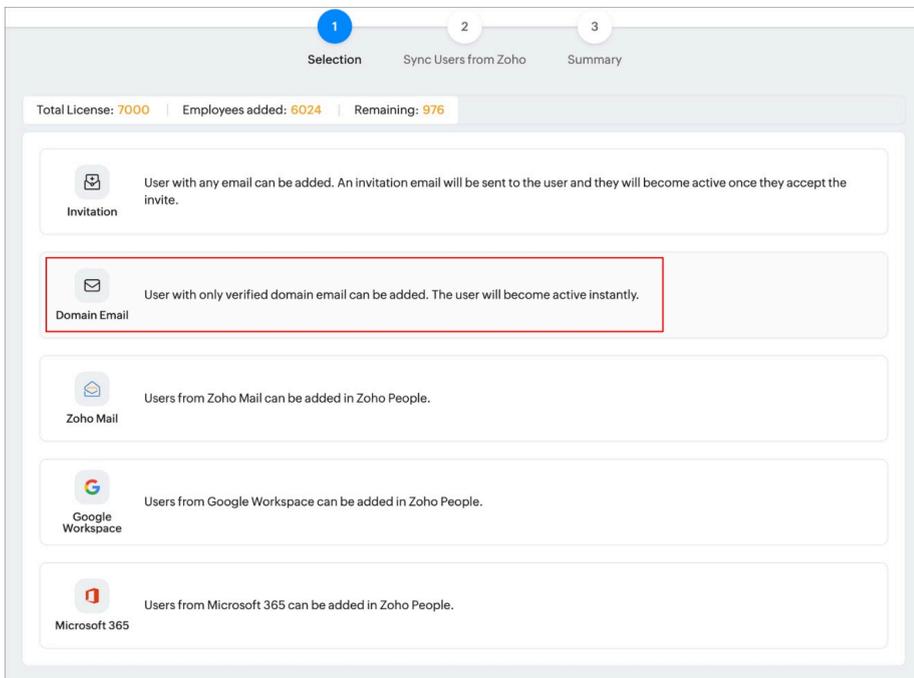
6. To trigger onboarding for that particular record, click **Yes**.

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

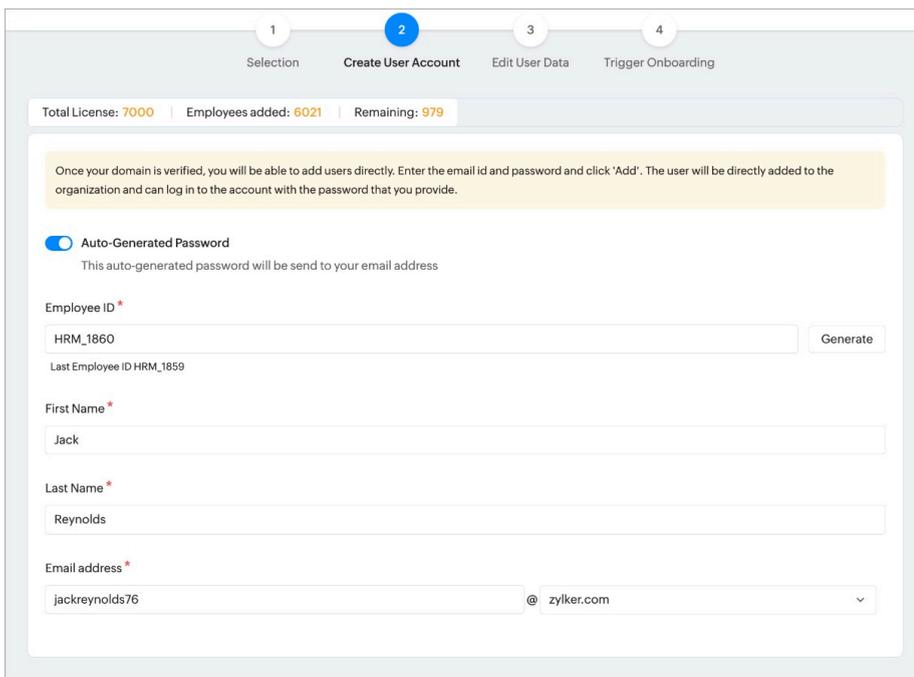
## Domain Email

This is a method to add users directly to your organization with verified domain email. You can give the users' user name and password and add them to the organization domain. They can change their password later. Given below are the steps to add users through Domain Email.

1. From your home page, go to **Operations > Employee Information > Employees > Add Employees**.
2. Select **Domain email** to add users.



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



4. After creating a user account, you can edit or add user data like basic information, work information, hierarchy information, personal details, identity information, contact details, separation information, system fields, work experience, education details, and dependent details.
5. After editing, click **Update**.

**Add User(s)**

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

**Basic Information**

Employee ID \* HRM\_1860 Nick name

First Name \* Jack Email address \* jackreynolds76@zyker.com

Middle Name

Last Name \* Reynolds

**Work Information**

Company \* Zyker Zoho Role Team member

Business Unit Zyker Marketing Employment Type

Division Employee Status Active

Department Designer Source of Hire Direct

Location Bangalore Date of Joining 11-Nov-2024

Update Skip

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

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

**Trigger Onboarding**

Yes  No

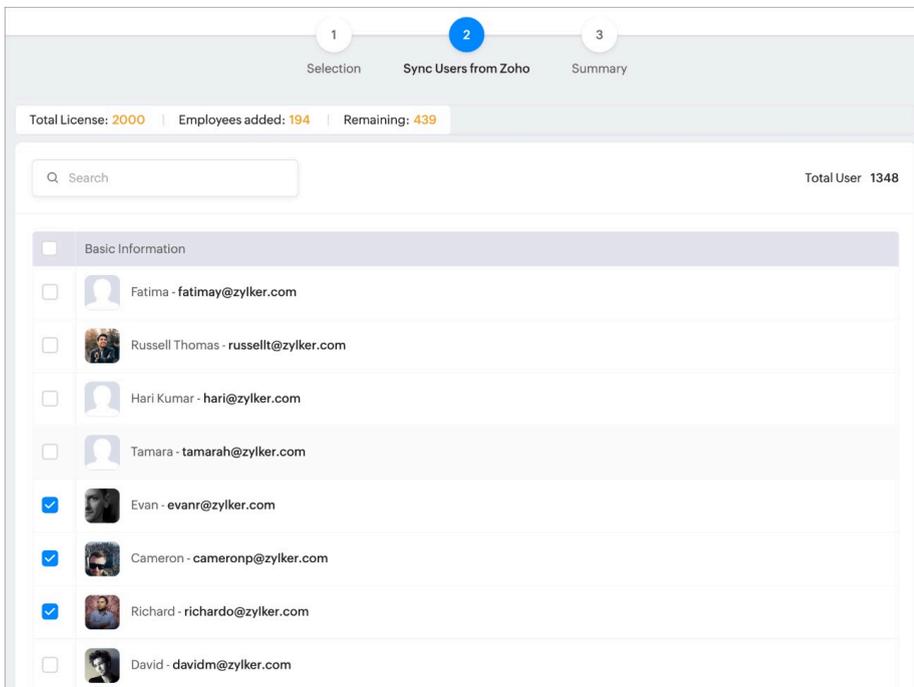
Onboarding will be triggered for this record

7. Click Finish after onboarding process has been triggered.

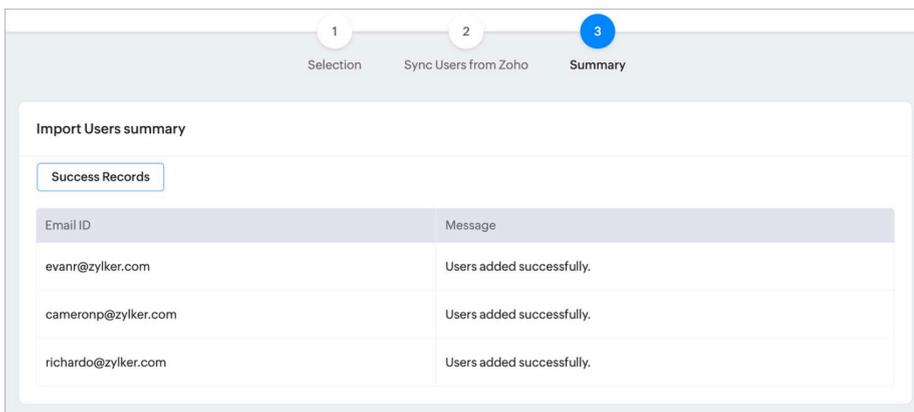
## Zoho Mail

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

1. From home, go to **Operations > Employee Information > Employees > Add Employees.**  
(This can also be done by navigating to **Settings > Manage Accounts > Users > Add Users.**)
2. Click Zoho Mail to sync users.
3. Search users using the search box.



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



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

## Add Users From Google Workspace and Microsoft 365

Click the following links to learn about adding users from Google and Microsoft services: \_

- [Adding Users From Google Workspace](#)
- [Adding Users From Microsoft 365](#)

Photo	EmployeeID	Name	Email ID	Date of joining	Department	Birth
	ZY103	Linda Wilkins	taree@zphone.zyker.com	07-Mar-2016	Logistics	05-11-1988
	ZY104	Alex Calotescu	taivas@zphone.zyker.com	01-Dec-2020	Creative	15-11-1990
	ZY105	Elizabeth Espartaco	espartaco@zphone.zyker.com	01-Dec-2020	Inventory	09-11-1990
	ZY106	Sam Elian	elian@zphone.zyker.com	01-Dec-2020	Procurement	23-Nov-1992
	ZY107	Rahul J	kalliden@zphone.zyker.com	13-May-2024	Human Resources	17-May-1993
	ZY108	Susan Elston	elston@zphone.zyker.com	22-Jan-2016	Administration	24-Jan-1991

The filter option allows for quick, targeted access to specific employee data.

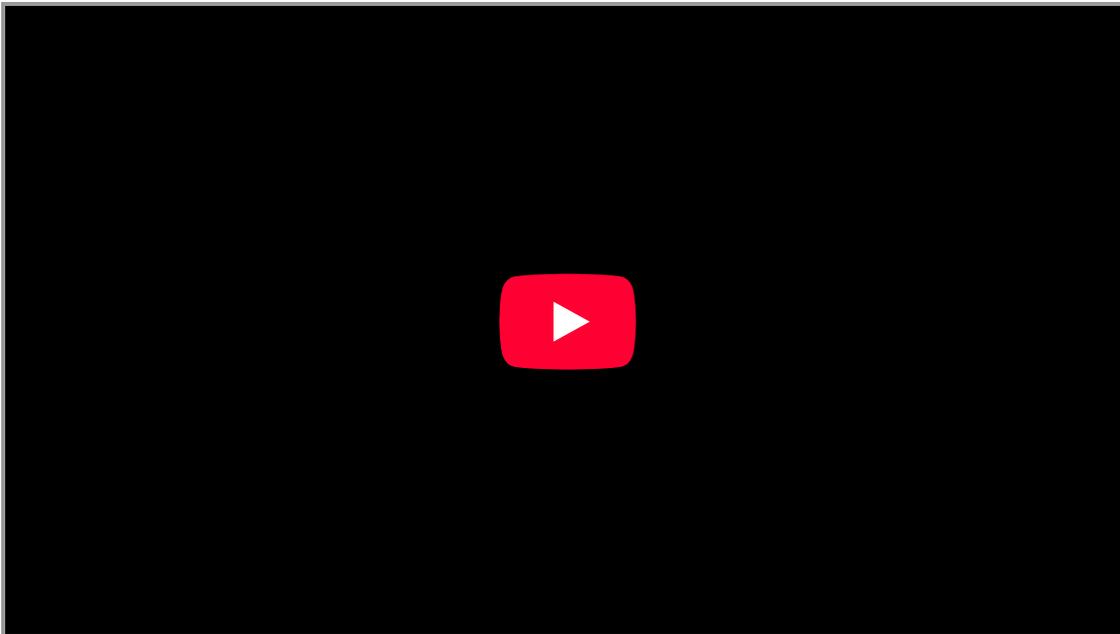
The ellipsis icon helps to Import data, Export data, History Export, Bulk File Upload, E-Sign Documents, and Show masked data.

## Departments

The **Departments** tab provides a view of all departments within the organization, along with details on who created each department, the creation date, who last modified it, and the time of modification.

To learn more about Public Views and My Views, [click here](#).

Watch our help video on organization setup:



## Adding a new Department

To add a new employee to your organization, click **Add Department**.

Department Name	Mail Alias	Added By	Added time	Modified By	Modified time	Department Code
<input type="checkbox"/> Visual Designer		ZY198 - Christine - S...	28-Oct-2024 00:43 AM	ZY198 - Christine - Spalding	28-Oct-2024 00:43 AM	VD
<input type="checkbox"/> Zylker Website Mark...		4570 - Scott - Fisher	08-Mar-2024 02:08 PM	4570 - Scott - Fisher	08-Mar-2024 02:08 PM	
<input type="checkbox"/> Software Testing		ZY198 - Christine - S...	11-Dec-2023 01:33 PM	ZY198 - Christine - Spalding	11-Dec-2023 01:33 PM	
<input type="checkbox"/> Zylker Marketing		1236 - Jacob - Sanders	11-Oct-2022 10:39 AM	1236 - Jacob - Sanders	11-Oct-2022 10:39 AM	
<input type="checkbox"/> Zylker Content Mark...		1236 - Jacob - Sanders	16-May-2022 04:01 PM	1236 - Jacob - Sanders	11-Oct-2022 10:25 AM	
<input type="checkbox"/> Monitoring_Weekend		ZY198 - Christine - S...	13-Apr-2020 05:06 PM	ZY198 - Christine - Spalding	07-Oct-2022 07:31 AM	
<input type="checkbox"/> Monitoring_APAC S...		ZY198 - Christine - S...	13-Apr-2020 05:05 PM	ZY198 - Christine - Spalding	07-Oct-2022 07:31 AM	
<input type="checkbox"/> Quality Assurance		ZY198 - Christine - S...	13-Apr-2020 04:56 PM	ZY198 - Christine - Spalding	13-Apr-2020 04:56 PM	

1. Enter the department name and give a code.
2. Add the department lead.
3. Choose the parent department.

**Add Department**

**Department Details**

Department Name\*  Mail Alias

Department Code

Department Lead

Reporting Manager *Christine Spalding ZY198*

Photo 

Parent Department

4. Click **Submit**.

**Department**

**Department Details**

Department Name  Mail Alias

Department Code  Modified By *ZY198 - Christine - Spalding*

Department Lead  Modified Time *28-Oct-2024 00:43 AM*

Reporting Manager *Christine Spalding ZY198*

Photo 

Parent Department

Added By *ZY198 - Christine - Spalding*

Added Time *28-Oct-2024 00:43 AM*

5. To update department details for a specific record, select the record and click the pencil icon to make changes.

Department Name	Mail Alias	Added By	Added time	Modified By	Modified time	Department Code
<input type="checkbox"/> Visual Designer		ZY198 - Christine - S...	28-Oct-2024 00:43 AM	ZY198 - Christine - Spalding	28-Oct-2024 00:43 AM	VD
<input type="checkbox"/> Zylker Website Mark...		4570 - Scott - Fisher	08-Mar-2024 02:08 PM	4570 - Scott - Fisher	08-Mar-2024 02:08 PM	
<input type="checkbox"/> Software Testing		ZY198 - Christine - S...	11-Dec-2023 01:33 PM	ZY198 - Christine - Spalding	11-Dec-2023 01:33 PM	
<input type="checkbox"/> Zylker Marketing		1236 - Jacob - Sanders	11-Oct-2022 10:39 AM	1236 - Jacob - Sanders	11-Oct-2022 10:39 AM	
<input type="checkbox"/> Zylker Content Mark...		1236 - Jacob - Sanders	16-May-2022 04:01 PM	1236 - Jacob - Sanders	11-Oct-2022 10:25 AM	
<input type="checkbox"/> Monitoring_Weekend		ZY198 - Christine - S...	13-Apr-2020 05:06 PM	ZY198 - Christine - Spalding	07-Oct-2022 07:31 AM	
<input type="checkbox"/> Monitoring_APAC S...		ZY198 - Christine - S...	13-Apr-2020 05:05 PM	ZY198 - Christine - Spalding	07-Oct-2022 07:31 AM	

Use this dropdown to configure a filtered view of your data, your reportees data, and your direct reportees data.

Department Name	Mail Alias	Added By	Added time	Modified By	Modified time	Department Code
Visual Designer		ZY198 - Christine - S...	28-Oct-2024 00:43 AM	ZY198 - Christine - Spalding	28-Oct-2024 00:43 AM	VD
Zyker Website Mark...		4570 - Scott - Fisher	08-Mar-2024 02:08 PM	4570 - Scott - Fisher	08-Mar-2024 02:08 PM	
Software Testing		ZY198 - Christine - S...	11-Dec-2023 01:33 PM	ZY198 - Christine - Spalding	11-Dec-2023 01:33 PM	
Zyker Marketing		1236 - Jacob - Sanders	11-Oct-2022 10:39 AM	1236 - Jacob - Sanders	11-Oct-2022 10:39 AM	
Zyker Content Mark...		1236 - Jacob - Sanders	16-May-2022 04:01 PM	1236 - Jacob - Sanders	11-Oct-2022 10:25 AM	
Monitoring_Weekend		ZY198 - Christine - S...	13-Apr-2020 05:06 PM	ZY198 - Christine - Spalding	07-Oct-2022 07:31 AM	

The filter option allows for quick, targeted access to specific employee data.

The ellipsis icon helps to Import data, Export data, History Export, Bulk File Upload, E-Sign Documents, and Show masked data.

## Designations

The **Designations** tab displays all designations within the organization, including information on who added each designation, the date of creation, the last person to modify it, and the time of modification.

To learn more about Public Views and My Views, [click here](#).

### Adding a new Designation

To add a new employee to your organization, click **Add Designation**.

Stream	Designation N...	Mail Alias	Modified Time	Modified By	Added Time	Added By	Lookup 1	EEO Category
Software	Technical Writer		28-Oct-2024 02:11 ...	ZY198 - Christine - Spal...	28-Oct-2024 02:11 ...	ZY198 - Christine - Spal...	Davis	Professionals
Software	Graphic Designer		10-Oct-2024 03:33 ...	ZY198 - Christine - Spal...	16-May-2022 04:05 ...	1236 - Jacob - Sanders	Frank	
	Editorial Manager		16-May-2022 04:04 ...	1236 - Jacob - Sanders	16-May-2022 04:04 ...	1236 - Jacob - Sanders	Olivia	
Software	SEO Specialist		11-Oct-2022 10:22 AM	1236 - Jacob - Sanders	16-May-2022 04:04 ...	1236 - Jacob - Sanders	Jacob	
Software	Content Market...		11-Oct-2022 10:33 AM	1236 - Jacob - Sanders	16-May-2022 04:03 ...	1236 - Jacob - Sanders	Mary	
	Content Writer		16-May-2022 04:03 ...	1236 - Jacob - Sanders	16-May-2022 04:03 ...	1236 - Jacob - Sanders	Eleanor	
	Manager-Leade...		09-Sep-2020 12:52 ...	ZY198 - Christine - Spal...	09-Sep-2020 12:52 ...	ZY198 - Christine - Spal...		

1. Enter the designation name and give a code.
2. Add the stream.
3. Fill up the other designation details.

4. Click **Submit**.

5. To update designation details for a specific record, select the record and click the pencil icon to make changes.

Stream	Designation Name	Mail Alias	Modified Time	Modified By	Added Time	Look up 1	EEO Category
Software	Technical Writer		28-Oct-2024 02:11 ...	ZY198 - Christine - Spal...	28-Oct-2024 02:11 ...	Davis	Professionals
Software	Graphic Designer		10-Oct-2024 03:33 ...	ZY198 - Christine - Spal...	16-May-2022 04:05 ...	Frank	
Software	Editorial Manager		16-May-2022 04:04 ...	1236 - Jacob - Sanders	16-May-2022 04:04 ...	Olivia	
Software	SEO Specialist		11-Oct-2022 10:22 AM	1236 - Jacob - Sanders	16-May-2022 04:04 ...	Jacob	
Software	Content Market...		11-Oct-2022 10:33 AM	1236 - Jacob - Sanders	16-May-2022 04:03 ...	Mary	
Software	Content Writer		16-May-2022 04:03 ...	1236 - Jacob - Sanders	16-May-2022 04:03 ...	Eleanor	
Software	Manager-Leade...		09-Sep-2020 12:52 ...	ZY198 - Christine - Spal...	09-Sep-2020 12:52 ...		

Use this dropdown to configure a filtered view of your data, your reportees data, and your direct reportees data.

The filter option allows for quick, targeted access to specific employee data.

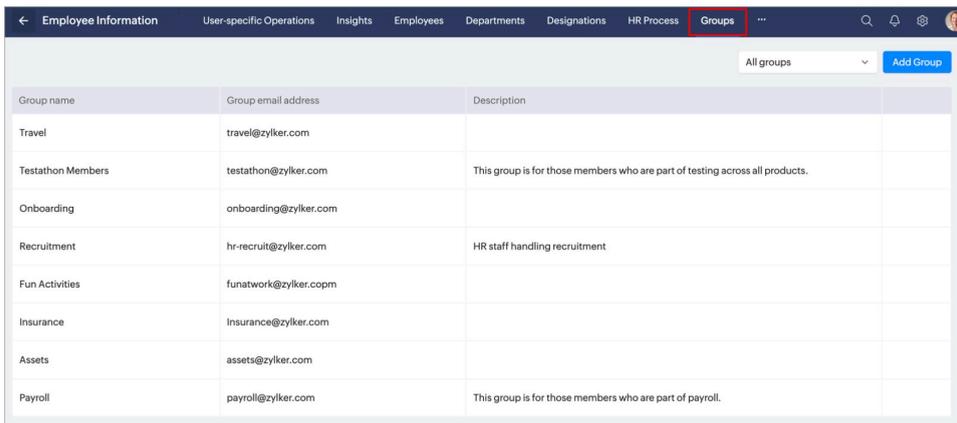
The ellipsis icon helps to Import data, Export data, History Export, Bulk File Upload, E-Sign Documents, and Show masked data.

## HR Process

To learn more about HR Process, [click here](#).

## Groups

The **Groups** tab can be used to add and manage employee groups. Groups can contain employees from any department, designation, etc.

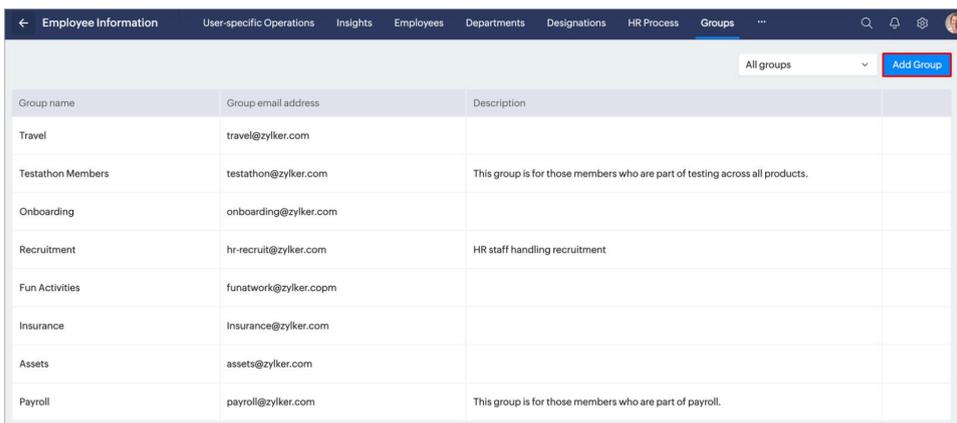


The screenshot shows the 'Groups' tab in the Zoho HR Process interface. The 'Groups' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar and an 'Add Group' button. The main content area displays a table with the following data:

Group name	Group email address	Description
Travel	travel@zyker.com	
Testathon Members	testathon@zyker.com	This group is for those members who are part of testing across all products.
Onboarding	onboarding@zyker.com	
Recruitment	hr-recruit@zyker.com	HR staff handling recruitment
Fun Activities	funatwork@zyker.com	
Insurance	insurance@zyker.com	
Assets	assets@zyker.com	
Payroll	payroll@zyker.com	This group is for those members who are part of payroll.

## Adding a new Group

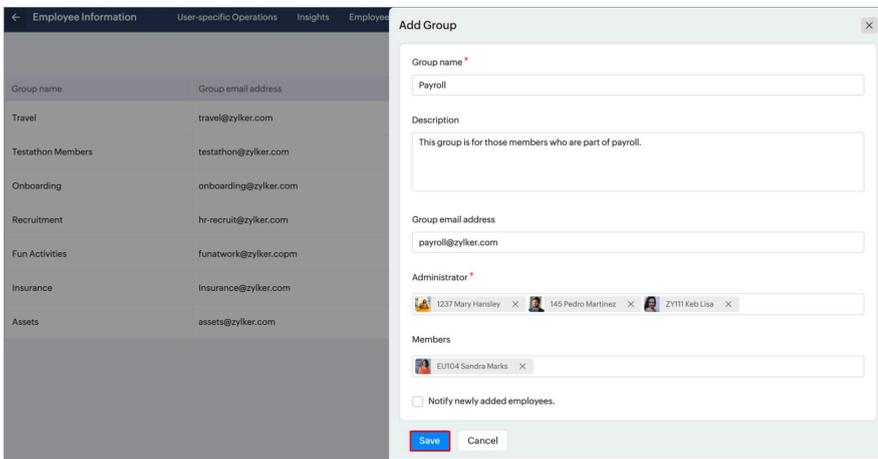
To add a new group, click **Add Group**.



The screenshot shows the 'Groups' tab in the Zoho HR Process interface. The 'Add Group' button is highlighted in red. The table below shows the same data as the previous screenshot:

Group name	Group email address	Description
Travel	travel@zyker.com	
Testathon Members	testathon@zyker.com	This group is for those members who are part of testing across all products.
Onboarding	onboarding@zyker.com	
Recruitment	hr-recruit@zyker.com	HR staff handling recruitment
Fun Activities	funatwork@zyker.com	
Insurance	insurance@zyker.com	
Assets	assets@zyker.com	
Payroll	payroll@zyker.com	This group is for those members who are part of payroll.

1. Enter the group name and description.
2. Enter the group email address.
3. Select the group administrators and group members.



4. Notifications can also be sent to newly added group members.

5. Click **Save**.

Group name	Group email address	Description
Travel	travel@zyker.com	
Testathon Members	testathon@zyker.com	This group is for those members who are part of testing across all products.
Onboarding	onboarding@zyker.com	
Recruitment	hr-recruit@zyker.com	HR staff handling recruitment
Fun Activities	funatwork@zyker.copm	
Insurance	insurance@zyker.com	
Assets	assets@zyker.com	
Payroll	payroll@zyker.com	This group is for those members who are part of payroll.

6. To edit the group details for a specific record, select the record and click the pencil icon to make changes.

**Payroll** ✎ ✕

🔍 Search and add employe Total Users 4

User	Role
1237 - Mary Hansley	Group admin <span style="float: right;">▼</span>
145 - Pedro Martinez	Group admin
ZY111 - Keb Lisa	Group admin <span style="float: right;">▼</span>
EU104 - Sandra Marks	Group member <span style="float: right;">▼</span>

### Edit Group ✕

Group name \*

Description

This group is for those members who are part of payroll.

Group email address

Save
Cancel

7. After editing, click **Save**.

## Delegations

The **Delegations** tab lets you add and manage delegations. Delegations in Zoho People enable users to temporarily assign approval responsibilities from one employee to another within a specified timeframe, ensuring continuity and efficiency in workflow management.

Delegator	Delegatee	Type	Date Range	Status
 You	 1244_deleted - Tina Francis	Temporary	17-Nov-2023 to 17-Nov-2023	Expired
 You	 ZY134 - Rebecca Biaggio	Temporary	03-Feb-2020 to 07-Feb-2020	Expired
 145 - Pedro Martinez	 ZY165 - Edison Buster	Temporary	08-Jan-2020 to 09-Jan-2020	Expired
 ZY134 - Rebecca Biaggio	 ZY197 - Aditi A	Temporary	19-Sep-2018 to 28-Sep-2018	Expired
 ZY179 - Lee Vanessa	 ZY130 - Benito Melissa	Temporary	10-Sep-2018 to 31-Oct-2018	Expired
 ZY178 - Walker Kristen	 1119 - Michel Rob	Temporary	24-Sep-2018 to 28-Sep-2018	Expired

### Adding a new Delegation

To add a new delegation, click **Add Delegation**.

Delegator	Delegatee	Type	Date Range	Status
You	1244_deleted - Tina Francis	Temporary	17-Nov-2023 to 17-Nov-2023	Expired
You	ZY134 - Rebecca Biaggio	Temporary	03-Feb-2020 to 07-Feb-2020	Expired
145 - Pedro Martinez	ZY165 - Edison Buster	Temporary	08-Jan-2020 to 09-Jan-2020	Expired
ZY134 - Rebecca Biaggio	ZY197 - Aditi A	Temporary	19-Sep-2018 to 28-Sep-2018	Expired
ZY179 - Lee Vanessa	ZY130 - Benito Melissa	Temporary	10-Sep-2018 to 31-Oct-2018	Expired
ZY178 - Walker Kristen	1119 - Michel Rob	Temporary	24-Sep-2018 to 28-Sep-2018	Expired

1. Select the delegator. (The one who will temporarily approve the requests)
2. Select the delegatee. (The one who will get assigned to the new approver for approval requests)
3. Choose the type of delegation, whether it is temporary or permanent.
4. Select the date range from which this should apply.

### Setup Delegation ✕

**Delegator\***

 Frank Ocean ▼

**Delegatee\***

 Rebecca Biaggio ▼

**Type**

Temporary ▼ 31-Oct-2024-06-Nov-20 📅

**Notification**

Delegator and Delegatee  Delegatee

**Description**

Save Cancel

5. Select who should be notified about the change in delegator, either both Delegator and Delegatee or only Delegatee, and enable the corresponding option.
6. Add the description of necessary.
7. Click **Save**.

Delegator	Delegatee	Type	Date Range	Status
 CND190 - Frank Ocean	 ZY134 - Rebecca Biaggio	Temporary	31-Oct-2024 to 06-Nov-2024	Upcoming
 You	 1244_deleted - Tina Francis	Temporary	17-Nov-2023 to 17-Nov-2023	Expired
 You	 ZY134 - Rebecca Biaggio	Temporary	03-Feb-2020 to 07-Feb-2020	Expired
 145 - Pedro Martinez	 ZY165 - Edison Buster	Temporary	08-Jan-2020 to 09-Jan-2020	Expired
 ZY134 - Rebecca Biaggio	 ZY197 - Aditi A	Temporary	19-Sep-2018 to 28-Sep-2018	Expired
 ZY179 - Lee Vanessa	 ZY130 - Benito Melissa	Temporary	10-Sep-2018 to 31-Oct-2018	Expired
 ZY178 - Walker Kristen	 1119 - Michel Rob	Temporary	24-Sep-2018 to 28-Sep-2018	Expired

This is how it appears after adding a new delegation.

To edit the delegation details for a specific record, select the record and click the pencil icon to make changes.

**View Delegation**
 

**Delegator**  
 CND190 - Frank Ocean

**Delegatee**  
 ZY134 - Rebecca Biaggio

**Type**  
Temporary

**Date Range**  
31-Oct-2024 - 06-Nov-2024

**Notification**  
Delegator and Delegatee

**Description**  
-

After editing, click **Save**.