



Zoho Corporation

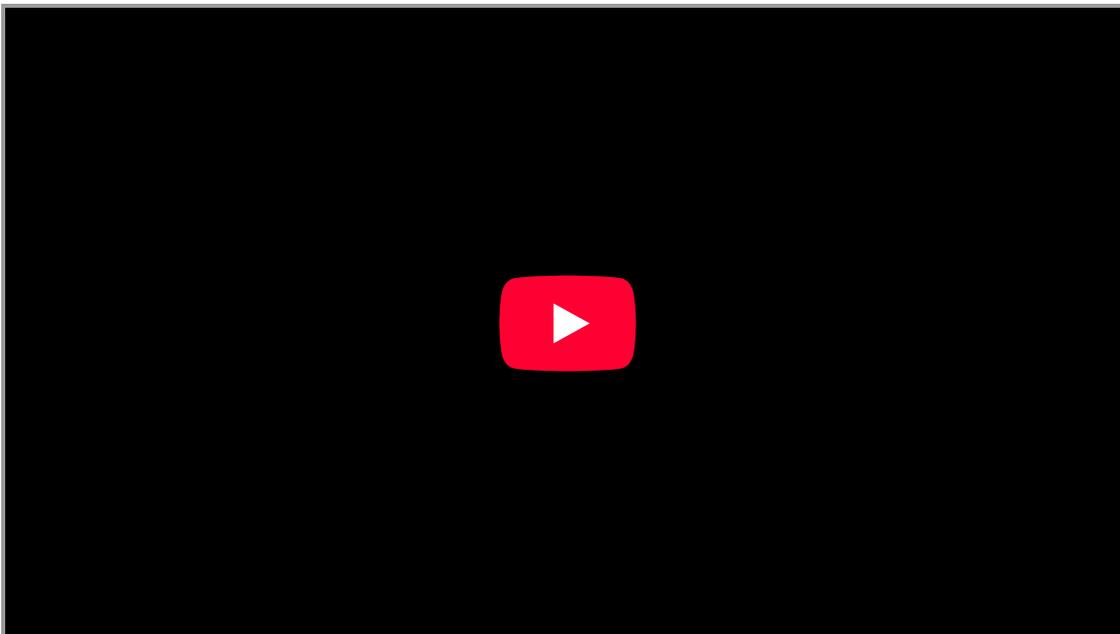
Z O H O

Zoho People 5.0 Administrator Guide

What is Zoho People 5.0?

Zoho People is a comprehensive cloud-based HR software that aims to streamline HR processes, enhance employee engagement, and improve workforce productivity. With this refreshing new version, Zoho People further aims to deliver an enhanced workplace journey in this ever-evolving workspace, not just for HR and managers but for all employees!

See the overview video of Zoho People 5.0 below:



ⓘ This guide is intended for Administrators and HR personnel who will configure the settings and manage operations in Zoho People.

Quick Navigation

Getting Started

- 🏠 [Setting up organization details and preferences](#)
- [Manage Accounts](#)
- [Employee Information \(Settings\)](#)

- [Employee Information \(Operations\)](#)
- [Organization Setup - Help Video](#) 
- [Adding your employees into Zoho People](#)
- [Adding Users - Help Video](#) 
- [Settings](#)
- [What can you do in "Settings" in Zoho People 5.0?](#)
- [Operations](#)
- [What can you do in "Operations" in Zoho People 5.0](#)

Services

- [Leave \(Time off\)](#)
[Settings](#) | [Operations](#) | [User Service](#)
- [Attendance](#)
[Settings](#) | [Operations](#) | [User Service](#)
- [Shifts](#)
[Settings](#) | [Operations](#)
- [Timesheet](#)
[Settings](#) | [Operations](#) | [User Service](#)
- [Performance](#)
[Settings](#) | [Operations](#) | [User Service](#)
- [Onboarding](#)
[Settings](#) | [Operations](#) | [User Service](#)
- [Employee Engagement](#)
[Settings](#) | [Operations](#) | [User Service](#)
- [Files](#)
[Settings](#) | [Operations](#) | [User Service](#)
- [Compensation](#)
[Settings](#) | [Operations](#) | [User Service](#)
- [HR Help Desk](#)
[Settings](#) | [Glossary](#) | [User Service](#)
- [LMS](#)
[LMS Settings](#) | [Course Settings](#) | [Courses](#) | [Glossary](#) | [Operations](#)
- [Reports](#)
- [Marketplace](#)
- [Developer Space](#)
- [Data Administration](#)

Common Settings

- [Extending Service in Zoho People](#)
- [Automation](#)
[Workflow](#) | [Email Alerts](#) | [Field Updates](#) | [Checklist and Tasks](#) | [Webhooks](#) | [Custom Functions](#) | [E-Sign](#)

[Flow](#)

⊞ [Templates](#)

[Email Templates](#) | [Letter Templates](#) | [Mail Merge Templates](#)

⊞ [Setting Up Permissions](#)

⊞ [Setting Up Approvals](#)

⊞ [Adding Administrators](#)

[Service Specific Administrators](#) | [Administrators for Settings & Operations](#) | [Administrator Role Users](#)

New in Zoho People 5.0

⊞ [New Home Tab](#)

[My Space](#) | [Team Space](#) | [Organization Space](#)

⊞ [New Settings](#)

⊞ [New Operations](#)

⊞ [E-Sign Templates](#)

⊞ [Appraisal Templates in Performance](#)

⊞ [Survey Templates](#)

⊞ [Custom Widgets](#)

⊞ [Compensation](#)

⊞ [Policy Documents](#)

⊞ [Career History](#)

⊞ [Sandbox](#)

⊞ [HR Process](#)

⊞ [Administrators for Settings & Operations](#)

Latest Updates

⊞ [Integration with Zoho Cliq](#)

[Handle employee requests directly from Zoho Cliq](#)

⊞ [Integration with Zoho Payroll](#)

[Organization structure based payroll sync and view applicable employees list](#)

⊞ [Recycle Bin](#)

[Restore deleted records easily](#)

⊞ [Check-in and Check-out time prediction](#)

[Automatically predict the check-in and check-out time of employees based on their previous attendance data](#)

⊞ [Location tracking using Zoho People mobile app](#)

[Capture and track geographical location data of employees using the Zoho People mobile app](#)

⊞ [Employee ID generation](#)

[Define customized rules to automatically generate Employee ID numbers](#)

⊞ [Attendance based leave accrual](#)

[Credit leave based on employee attendance](#)

⊞ [Request feedback](#)

[Request feedback on your reportees from other employees in the organization](#)

⬡ [Mandatory survey](#)

[Conduct mandatory surveys to gather feedback form all employees](#) | [eNPS Survey](#) | [Engagement Survey](#)

⬡ [Mandatory acknowledgement](#)

[Ensure all employees read and acknowledge the document using the mandatory acknowledgement feature](#)

⬡ [Shift patterns](#)

[Automate the shift scheduling process for your employees using the shift pattern feature](#)

⬡ [Employee Engagement - User Service](#)

[A dedicated space for employees to view and complete open surveys, view their responses, and track survey status](#)

⬡ [Web Tabs](#)

[Load websites or third-party web apps within Zoho People](#)

⬡ [Candidate Onboarding - Multi-flow](#)

[Create multiple candidate onboarding flows to personalize the onboarding process for new hires based on their work location and designation](#)

⬡ [New Employee Goal Setting Period Configuration](#)

[Goals can be set for new employees immediately upon joining, regardless of the standard goal-setting period of your organization](#)

[Help Videos >](#)

[Employee Handbook >](#)