



Set up Zoho Directory

Zoho Directory is a cloud-based identity and access management service that lets you authenticate and manage your organization's employees for accessing various apps and resources. In this guide, we will guide you towards setting up Zoho Directory for your organization.

Sign up for Zoho Directory

If you are a new Zoho user, follow these steps:

1. Go to [Zoho Directory's homepage](#) [↗].
2. Enter your details, then click **GET STARTED NOW**.
3. Go through the welcome tour by clicking **Start tour**.
4. Confirm your Zoho account by verifying your email address through the confirmation email you received.

If you are an existing Zoho user and you are new to Zoho Directory, follow these steps:


1. Go to [Zoho Directory's homepage](#) [↗], then click **ACCESS ZOHO DIRECTORY**.
2. Enter your details, then click **Create Account**.
3. Go through the welcome tour by clicking **Start tour**.

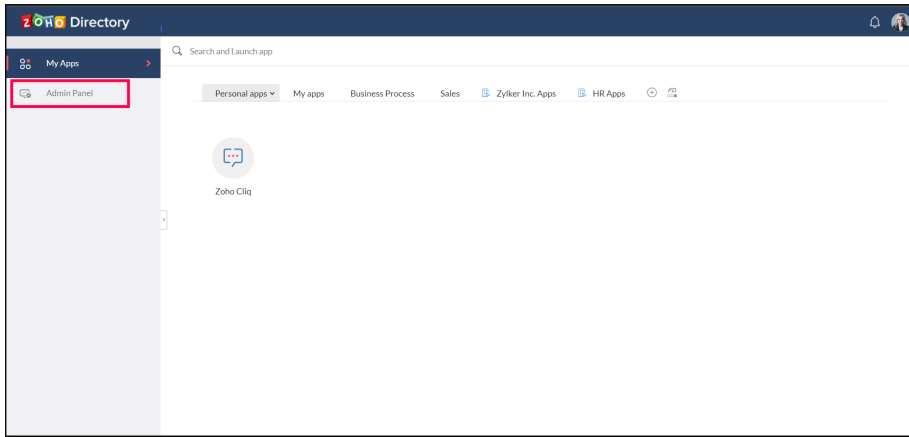
Once completed, you can start using Zoho Directory.

Access the admin panel

Let's start exploring Zoho Directory's admin panel. The admin panel is the centralized console for administering and managing your users and apps. Using the admin panel, you can delegate your users, assign apps to them, manage apps that you have added, and enforce your organization's security.

To access the admin panel:

1. Sign in to [Zoho Directory](#) . If you've signed out, sign in to access Zoho Directory.



2. Click **Admin Panel** in the left menu to access your admin panel.

Set up your organization

The next step is to set up your organization in Zoho Directory. Let's start by [adding and verifying your organization's domain](#) in Zoho Directory. You will require this domain to sync users from Active Directory or to set up mailboxes for your organization users. [Learn more about domains](#)

Next, [add designations](#) and [work locations](#) of your organization. Designations refer to the job titles or official roles of your employees. Work location refers to the location of your organization's offices or branches.


Add and configure apps

The next step will be to add and configure apps for your organization. Zoho Directory supports single sign-on (SSO) provisioning of apps, which enables you to securely access your apps without the trouble of signing in to each app separately. You can add and manage pre-integrated SSO apps available in the app directory as well as custom apps.

[Learn more about adding apps](#)

Once you've added a Zoho app, you can configure that app to make it easier for you to assign to your organization's users. Each Zoho app has its own settings based on its type.


To access a Zoho app's settings:

1. Sign in to [Zoho Directory](#) , then click **Admin Panel** in the left menu.
2. Click **Applications**, then click on the app that you want to configure.
3. Click **Settings**.
4. [Edit the app's settings](#) depending upon your requirements.

Add or import users

After setting up your organization in Zoho Directory, you can now start adding your employees and manage them. If you want to import users from your current implementation to Zoho Directory, [you can migrate them](#) through Active Directory or LDAP server using [Zoho Directory sync tool](#). If you don't have either of the above servers,

you can [bulk import users](#) through the user data file in CSV, VCS, XLS, and XLXS formats. You can also [add individual users](#) manually in Zoho Directory.

 Note: If you're planning to sync your employees from AD, we also suggest [adding custom fields](#) to make sure all of your employee information is successfully synced with Zoho Directory. [Learn more about custom fields](#)

Form groups

Once you've added your employees in Zoho Directory, you can start forming [user groups](#). Groups allow you to administer, monitor, and manage your organization users with ease. In Zoho Directory, you can form two types of groups:

[Collaboration group](#): A flexible group that you can create for a specific need.

[Department](#): A type of fixed group that lets you simulate your organization's hierarchy.

Assign apps

Now that you've added and configured your apps, you are now ready to assign them to your users. You can assign apps manually to [individual users](#), [groups](#), or [everyone](#) present in your organization. Additionally, Zoho Directory offers [conditional app assignment](#) that lets you assign apps to users and groups based on a specific condition that you set. For example, you can [set a condition](#) to assign a user as an app admin in Zoho CRM if their designation is "Manager". You can also set up conditions for a group, and this condition will apply to a user as soon as they join that group. This will save you the time and effort for manually assigning multiple apps to users.

Configure security policies

[Configuring security policies](#) is the most important step in setting up your organization, as it secures your organization's and users' data. Security policies enable you to set up certain rules that define how your employees can access their accounts. For example, the [password policies](#) will let you set specific criteria on how your employees' passwords should be, [MFA policies](#) will let you enforce the practice of multi-factor authentication for your employees, [IP restrictions](#) will let you restrict your employees accessing their accounts from certain locations, and [session management](#) will let you monitor your employees' active sessions.

Assign admins

Once you've added users, you can also [assign certain users as the admin](#) of the organization. This will let you delegate the administration of the organization among your employees. Admins have control over adding users and apps, assigning apps, forming groups, and configuring security policies. [Learn more about admins](#)

What's next?

Congrats! You've now completed setting up your organization in Zoho Directory. If you want to learn more on how to customize Zoho Directory for your organization, check out [our detailed admin guide](#).