IT technicians · Zoho One optimization

# Zoho People

## User and Administrator Manual

→ Go to the index

Prepared by Nuagix · September 2026

nuagix.ca · support@nuagix.ca

Zoom meeting: https://nuagix.zohobookings.com/#/andre-martin

# Index — English version

*Click any title to jump directly to that section. Each chapter ends with a “Back to index” link.*

## PART 1 — USER GUIDE


1. **Introduction and access**
   - 1.1 About this manual
   - 1.2 What is Zoho People?
   - 1.3 Signing in
2. **Interface and navigation**
   - 2.1 Interface elements
   - 2.2 Quick navigation
3. **Employee profile and org chart**
   - 3.1 Employee profile content
   - 3.2 Updating your information
   - 3.3 Org chart and directory
4. **Self-service portal**
   - 4.1 What employees can do
   - 4.2 Tracking your requests
   - 4.3 For managers
5. **Attendance and time clock**
   - 5.1 Checking in
   - 5.2 Check-in methods
   - 5.3 Correcting an entry
6. **Leave**
   - 6.1 Requesting leave
   - 6.2 Viewing your balances
   - 6.3 Leave and Quebec labour standards
7. **Timesheets and shifts**
   - 7.1 Filling in a timesheet
   - 7.2 Shifts
   - 7.3 For managers
8. **Performance, goals and feedback**
   - 8.1 Performance management components
   - 8.2 Completing your appraisal
   - 8.3 Tracking your goals
9. **Training (LMS)**
   - 9.1 Taking a course
   - 9.2 Training features
10. **HR cases and requests**
    - 10.1 Submitting a case to HR
    - 10.2 Good to know

## 11. Reports and Zia
11.1 Available reports
11.2 Creating a custom report
11.3 Zia
## 12. Mobile app
12.1 Features
## 13. Best practices
13.1 Nuagix recommendations


# PART 2 — ADMINISTRATOR GUIDE


## 14. Roles, permissions and users
14.1 Default roles
14.2 Configuring permissions
14.3 Adding an employee
## 15. Organization settings
15.1 Organization structure
15.2 Leave policies
15.3 Attendance and shift policies
## 16. Employee onboarding
16.1 Configuring the onboarding process
16.2 Candidate portal
## 17. Employee exits
17.1 Managing an exit
17.2 Checkpoints
## 18. Custom forms
18.1 Creating or editing a form
18.2 Examples of useful forms
## 19. Approval workflows and automation
19.1 Automation tools
19.2 Creating an approval workflow
## 20. Integrations
20.1 Zoho integrations
20.2 Other integrations
## 21. Security and compliance
21.1 Security controls
21.2 Privacy and Quebec Law 25
## 22. Editions and licenses
22.1 Editions
22.2 Tracking usage
## 23. Deployment checklist
23.1 Before going live

APPENDIX

A. English-French glossary

A.1 Interface terms

# Part 1 — User Guide


1. Introduction and access
2. Interface and navigation
3. Employee profile and org chart
4. Self-service portal
5. Attendance and time clock
6. Leave
7. Timesheets and shifts
8. Performance, goals and feedback
9. Training (LMS)
10. HR cases and requests
11. Reports and Zia
12. Mobile app
13. Best practices


↑ Back to index

# 1. Introduction and access

## 1.1 About this manual

This manual describes the Zoho People features available to employees and managers, and the functions reserved for HR administrators, as available in September 2026.

Available features vary by edition and by your organization's configuration. This manual describes the software; it is not legal advice on employment law.

## 1.2 What is Zoho People?

Zoho People is Zoho's human resources management software. It centralizes employee records, attendance, leave, timesheets, shifts, performance management, training, onboarding and departures. Every employee has a self-service portal to view their information and submit requests, and every manager approves their team's requests.

## 1.3 Signing in

1. Go to https://people.zoho.com (or https://people.zohocloud.ca if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select People.
4. Complete multi-factor authentication with Zoho OneAuth if required.

> **Nuagix tip —** Install the Zoho People mobile app: checking in, requesting leave or approving a request takes just seconds.

↑ Back to index

# 2. Interface and navigation

## 2.1 Interface elements

| Element | Purpose |
|---|---|
| **Home** | Personal dashboard: check-in, leave balances, tasks, announcements, birthdays |
| **My Space** | Your information, attendance, leave, timesheets, goals |
| **Team** | For managers: team attendance, leave and requests |
| **Organization** | Org chart, employee directory, policies, announcements |
| **Operations** | For HR: records, onboarding, exits, forms |
| **Reports** | Standard and custom reports |
| **Settings** | Configuration, reserved for administrators |

## 2.2 Quick navigation

- Global search for an employee, form or policy
- Notifications and pending approvals under the bell
- Services: access to enabled modules (attendance, leave, performance, etc.)
- Feeds: organization announcements and posts

↑ Back to index

# 3. Employee profile and org chart

## 3.1 Employee profile content

| Section | Content |
|---|---|
| **Personal information** | Name, contact details, date of birth, emergency contact |
| **Work information** | Job title, department, manager, work location, hire date |
| **History** | Promotions, transfers, salary changes, depending on permissions |
| **Documents** | Contract, signed policies, supporting documents |
| **Skills and training** | Completed training, certifications, skills |
| **Assets** | Equipment issued (computer, phone, access card) |

## 3.2 Updating your information

1. My Space > Profile.
2. Click Edit in the relevant section (e.g., address, emergency contact).
3. Save; depending on configuration, the change is submitted for HR approval.
4. Attach any requested supporting documents.

> **Note** — Some fields (salary, job title, hire date) can only be changed by HR.

## 3.3 Org chart and directory

- Interactive org chart by department or manager
- Employee directory with search and filters
- Public profile of each colleague (title, team, work contact details)
- Information visibility controlled by permissions

↑ Back to index

# 4. Self-service portal

## 4.1 What employees can do

- View and update their personal information
- Check in and check out
- Request leave and view balances
- Fill in timesheets
- View their documents and e-sign policies
- Submit a request or question to HR
- Track their goals, appraisals and training

## 4.2 Tracking your requests

1. My Space > Requests, or the relevant module's tab.
2. Check the status: pending, approved or rejected.
3. Open the request to see the approver's comments.
4. Cancel a request that is still pending, if needed.

## 4.3 For managers

1. Open the Team area or the list of pending approvals.
2. Review each request (leave, attendance correction, timesheet).
3. Approve or reject with a comment.
4. Delegate your approvals during your vacation, if the option is enabled.

> **Nuagix tip —** Process your team's requests at least twice a week: late approvals hold up timesheets and payroll.

↑ Back to index

# 5. Attendance and time clock

## 5.1 Checking in

1. From Home or the Attendance module, click Check-in.
2. Click Check-out at the end of the day.
3. Record your breaks if the organization requires it.
4. Review your hours in the daily, weekly or monthly view.

## 5.2 Check-in methods

| Method | Description |
|---|---|
| **Web browser** | Check-in button in Zoho People |
| **Mobile app** | Check-in with geolocation or geofencing, depending on configuration |
| **Biometric device** | Fingerprint or facial recognition device connected to Zoho People |
| **Kiosk** | Shared tablet at the workplace entrance |
| **IP address** | Check-in allowed only from the company network |

## 5.3 Correcting an entry

1. Open the relevant day in your attendance calendar.
2. Click Regularization.
3. Enter the actual hours and the reason.
4. Submit: your manager approves or rejects the correction.

**Caution —** Geolocation is personal information. The employer must inform employees of its use and limit it to working hours.

↑ Back to index

# 6. Leave

## 6.1 Requesting leave

1. Leave module > Apply Leave.
2. Choose the leave type (vacation, sick, family obligations, personal, etc.).
3. Select the dates and, if needed, the half-day or number of hours.
4. Add a reason and an attachment if required.
5. Submit: the request is sent to your manager for approval.

## 6.2 Viewing your balances

- Available balance, days taken and upcoming days by leave type
- Leave accrual according to the organization's policy
- Team leave calendar to plan your vacation
- Holidays applicable to your work location

## 6.3 Leave and Quebec labour standards

In Quebec, the Act respecting labour standards provides, among other things, for annual vacation whose length depends on continuous service, statutory general holidays (including National Holiday, June 24), and absences for sickness and family obligations, some of which are paid. Your organization configures its leave types and policies in Zoho People taking these standards and its own working conditions into account.

For any question about your rights, contact your HR department or the CNESST.

> **Note —** This manual is not legal advice on employment law. The exact rules are set by the law, regulations and, where applicable, your collective agreement.

↑ Back to index

# 7. Timesheets and shifts

## 7.1 Filling in a timesheet

1. Time Tracker module > Time Logs.
2. Choose the client, project and job.
3. Enter the hours, or start the timer and stop it when the task is done.
4. Indicate whether the hours are billable.
5. At the end of the period, generate the Timesheet and submit it for approval.

> **Nuagix tip —** Log your hours daily rather than at the end of the week: the data is more accurate and client billing is faster.

## 7.2 Shifts

- View your shift schedule under Attendance > Shifts
- Fixed, rotating or night shifts depending on the organization
- Request a shift swap or change, depending on configuration
- Notifications when the schedule is published or changed
- Breaks and overtime calculated according to the shift policy

## 7.3 For managers

- Plan and publish the team's shifts
- Approve timesheets and shift swaps
- Track billable hours by client or project
- Export approved hours to payroll or to Zoho Books for invoicing

↑ Back to index

# 8. Performance, goals and feedback

## 8.1 Performance management components

| Component | Description |
|---|---|
| **Goals / OKR** | Individual, team or organization goals, with progress |
| **Key result areas (KRA)** | Main responsibilities assessed in the cycle |
| **Skill sets** | Skills expected for the position |
| **Self-appraisal** | The employee rates their own performance |
| **Manager appraisal** | Manager's rating and comments |
| **360-degree feedback** | Feedback from peers, direct reports or other reviewers |
| **Continuous feedback** | Comments and recognition throughout the year |

## 8.2 Completing your appraisal

1. When the appraisal cycle starts, you receive a notification.
2. Open Performance > Appraisal.
3. Rate each goal and skill, and add concrete comments.
4. Submit your self-appraisal before the deadline.
5. Then review your manager's appraisal and discuss it at the performance meeting.

## 8.3 Tracking your goals

- Create your goals or accept those assigned by your manager
- Update progress regularly
- Link your goals to team and organization goals
- Ask a colleague for feedback

> **Nuagix tip —** Write measurable goals with a deadline (e.g., reduce customer response time to 24 hours by December): the year-end appraisal becomes much simpler.

↑ Back to index

# 9. Training (LMS)

## 9.1 Taking a course

1. Open the Learning module.
2. View the courses assigned to you or browse the catalogue.
3. Enrol in an online course or a classroom session (virtual or on site).
4. Work through the modules (videos, documents, presentations) at your own pace.
5. Pass the assessments and download your certificate.

## 9.2 Training features

- Online courses and learning paths
- Virtual classroom sessions with registration
- Assessments and assignments
- Certificates and training history in the employee profile
- Mandatory training with deadlines (e.g., health and safety, cybersecurity)
- Discussion forum per course

> **Note —** Keep the history of mandatory training in Zoho People: it documents the organization's training efforts.

↑ Back to index

# 10. HR cases and requests

## 10.1 Submitting a case to HR

1. Open the Case Management module or the HR help centre.
2. Click Add Case.
3. Choose the category (payroll, benefits, leave, employment letter, etc.).
4. Describe your request and attach relevant documents.
5. Track the case status and exchange with the HR agent through comments.

## 10.2 Good to know

- Each category is assigned to an HR person or team
- Response times (SLA) can be set by category
- Confidential cases are visible only to the assigned agent
- A knowledge base answers frequently asked questions

> **Nuagix tip —** Check the knowledge base and the policies under Organization first: the answer to your question is often there.

↑ Back to index

# 11. Reports and Zia

## 11.1 Available reports

| Report | Content |
|---|---|
| **Headcount** | Number of employees by department, location, employment type |
| **Attendance** | Hours worked, late arrivals, absences, overtime |
| **Leave** | Balances, leave taken and planned by type |
| **Timesheets** | Hours by project, by client, billable or not |
| **Turnover** | Hires, departures and turnover rate |
| **Performance** | Appraisal results and goal progress |

## 11.2 Creating a custom report

1. Reports > Custom Reports > Create.
2. Choose the source form (e.g., Employees, Leave).
3. Select columns, criteria and groupings.
4. Save and share the report with the relevant roles, or export it.

## 11.3 Zia

- Answer employees' questions about policies and balances
- Quickly find information or an employee
- Help draft text (announcements, descriptions, comments)
- Flag attendance trends, depending on edition

> **Note —** Zia features depend on the edition and on being enabled by the administrator. Always check a Zia answer against the official policy.

↑ Back to index

# 12. Mobile app

## 12.1 Features

- Check in and out, with geolocation if configured
- Request leave and view balances
- Log hours and start a timer
- Approve team requests (managers)
- View the directory, org chart and announcements
- Take training and submit an HR case

↑ Back to index

# 13. Best practices

## 13.1 Nuagix recommendations

- Keep your personal information and emergency contact up to date
- Check in every day and quickly correct any missed entries
- Request vacation as early as possible and check the team calendar
- Log your hours every day
- Update your goals every month, not only at the annual appraisal
- Use HR cases rather than email for your requests: they are tracked and documented
- Managers: approve requests at least twice a week

↑ Back to index

# Part 2 — Administrator Guide

14. Roles, permissions and users
15. Organization settings
16. Employee onboarding
17. Employee exits
18. Custom forms
19. Approval workflows and automation
20. Integrations
21. Security and compliance
22. Editions and licenses
23. Deployment checklist

↑ Back to index

# 14. Roles, permissions and users

## 14.1 Default roles

| Role | Controls |
|---|---|
| **Admin** | Full access to all services, forms and settings |
| **Director** | Broad access to their division's data, depending on configuration |
| **Manager** | Their team's data and approvals |
| **Team Incharge** | Supervises a team without being the reporting manager |
| **Team Member** | Their own data and self-service |
| **Custom roles** | Created as needed (e.g., Payroll Agent, Health and Safety Lead) |

## 14.2 Configuring permissions

1. Settings > Manage Accounts > User Access Control > Roles.
2. Choose the role or create a new one.
3. Set function-based permissions (access to services and operations).
4. Set form-level permissions: view, add, edit, delete, for their own data, their team's or everyone's.
5. Restrict access to sensitive fields (salary, SIN, banking information).

**Caution —** Keep access to fields such as the social insurance number and banking information to a strict minimum. This is sensitive personal information.

## 14.3 Adding an employee

1. Operations > Employee Information > Employees > Add.
2. Enter the name, email, job title, department, manager and hire date.
3. Assign the role in Zoho People.
4. Send the invitation to activate the employee's account.

**Note —** In Zoho One, first add the user in the Zoho One console and assign them the People app. An employee can exist in People without an active account, for example before their start date.

↑ Back to index

# 15. Organization settings

## 15.1 Organization structure

- Company profile, time zone, currency (CAD) and date format
- Work locations (e.g., Montreal, Quebec City, remote)
- Departments and designations
- Employment types: permanent, temporary, part-time, intern, contractor
- Holiday calendar by location
- Pay period and fiscal year

## 15.2 Leave policies

1. Settings > Leave Tracker > Leave Types.
2. Create each type: vacation, sick, family obligations, personal, unpaid, etc.
3. Define eligibility (employment type, location, seniority).
4. Configure accrual (yearly, monthly, based on hours worked), carry-forward and cap.
5. Indicate whether the leave is paid and whether it requires a supporting document.
6. Add the holidays applicable to each work location.

> **Note —** Configure your policies taking into account Quebec's Act respecting labour standards, your contracts and any collective agreement. This manual is not legal advice on employment law; validate your policies with an HR advisor or a lawyer.

## 15.3 Attendance and shift policies

- Working hours, late-arrival grace period and break duration
- Overtime rules
- Shifts and rotations
- Allowed check-in methods (web, mobile, biometric, IP)
- Geofencing of work locations

> **Nuagix tip —** Test each policy with two or three pilot employees for a full pay period before rolling it out to the whole organization.

↑ Back to index

# 16. Employee onboarding

## 16.1 Configuring the onboarding process

1. Settings > Onboarding.
2. Define the stages: before arrival, first day, first week, end of probation.
3. Create the tasks and assign them (HR, IT, manager, buddy).
4. Prepare the documents to e-sign (contract, policies, tax forms).
5. Add the mandatory training to complete.

## 16.2 Candidate portal

- The future employee accesses the portal before their arrival
- They fill in their personal information and upload their documents
- They sign the documents and review the policies
- On the start date, they become an active employee and their data is transferred to their profile

> **Nuagix tip —** Send portal access one week before the start date: the first day can be spent welcoming the new hire rather than on paperwork.

↑ Back to index

# 17. Employee exits

## 17.1 Managing an exit

1. Operations > Exit > Start the process for the employee.
2. Enter the departure date and reason (resignation, end of contract, retirement, etc.).
3. Trigger the task list: equipment return, access revocation, final pay.
4. Schedule the exit interview and record it.
5. Provide the end-of-employment documents, then deactivate the account on the planned date.

## 17.2 Checkpoints

- Revocation of application access (Zoho One, email, Vault)
- Transfer of the departing manager's tasks, files and approvals
- Update of the org chart and of direct reports' managers
- Calculation of vacation and hours owed by the payroll team
- Retention of the file according to your retention policy

> **Caution —** If the departing employee is a manager, reassign their direct reports and approvals before deactivating their account, otherwise requests will stay blocked.

↑ Back to index

# 18. Custom forms

## 18.1 Creating or editing a form

1. Settings > Customization > Forms.
2. Edit an existing form (e.g., Employee) or create a new form (e.g., Training Reimbursement).
3. Drag in the fields you need: text, date, picklist, lookup, file, formula, section.
4. Set mandatory fields and permissions by role.
5. Add conditional display and validation rules.
6. Save and make the form available to the relevant roles.

## 18.2 Examples of useful forms

- Training expense reimbursement request
- Workplace accident or incident report
- Remote work request
- Equipment issue and return
- Employment letter request

> **Nuagix tip —** Write your forms in French and limit fields to the information that is truly needed: it is simpler for employees and consistent with Law 25's data minimization principle.

↑ Back to index

# 19. Approval workflows and automation

## 19.1 Automation tools

| Tool | Use |
|---|---|
| **Approvals** | Have a request approved at one or more levels (manager, HR, management) |
| **Workflows** | Trigger actions on add, edit or a date |
| **Email alerts** | Notify people based on criteria (e.g., end of probation) |
| **Field updates** | Change a value automatically |
| **Webhooks and custom functions** | Connect other systems or apply custom logic |
| **Scheduled reminders** | Service anniversaries, document renewals, appraisals |

## 19.2 Creating an approval workflow

1. Settings > Automation > Approvals > Add.
2. Choose the form (e.g., Leave, Timesheets).
3. Define the criteria (e.g., leave of more than five days).
4. Add the approval levels: manager, then HR.
5. Configure notifications and delegation during absences.
6. Test with a dummy request.

> **Nuagix tip —** Keep approval workflows short (one or two levels): each additional level lengthens the response time for employees.

↑ Back to index

# 20. Integrations

## 20.1 Zoho integrations

| Application | Typical use |
|---|---|
| **Zoho Recruit** | Move a hired candidate into onboarding in People |
| **Zoho Payroll** | Payroll based on attendance and leave, depending on availability in Canada |
| **Zoho Books** | Invoice billable hours from timesheets |
| **Zoho Expense** | Employee expenses and reimbursements |
| **Zoho Projects** | Sync projects, tasks and hours |
| **Zoho Sign** | E-signature of HR documents |
| **Zoho Cliq and Zoho Workplace** | Announcements, check-in and notifications |
| **Zoho Analytics** | Advanced HR analytics |

## 20.2 Other integrations

- Export of attendance and leave to your existing payroll provider
- Compatible biometric devices
- Microsoft 365, Google Workspace and directories for authentication
- REST API (OAuth 2.0) and webhooks

> **Note —** In Quebec, payroll has specific requirements (provincial deductions, slips). Check that the chosen payroll solution is suited to Quebec before connecting it to Zoho People.

↑ Back to index

# 21. Security and compliance

## 21.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Permissions by role, form and field
- Access restriction by IP address
- Encryption of sensitive fields
- Audit log: history of views and changes
- Hosting in the Canadian data center (zohocloud.ca)

## 21.2 Privacy and Quebec Law 25

- Collect only the information needed to manage employment
- Inform employees of the purposes of collection (including geolocation and biometrics)
- Restrict access to sensitive information (SIN, health, banking information)
- Set a retention period for former employees' and candidates' files
- Handle employees' access and correction requests
- Document your measures in your personal information governance policies

> **Note —** This manual is not legal advice. Confirm your obligations with your legal advisor. The use of biometrics may be subject to specific obligations in Quebec.

↑ Back to index

# 22. Editions and licenses

## 22.1 Editions

| Edition | For whom |
| --- | --- |
| **Essential HR** | Employee records, leave, self-service |
| **Professional** | Adds attendance, shifts and timesheets |
| **Premium** | Adds performance, HR cases and advanced features |
| **Enterprise** | Adds training (LMS) and higher limits, depending on the plan |
| **People Plus / Zoho One** | People included with other HR or suite apps |

> **Note —** Edition content changes over time. See Zoho's pricing page for the current list of included modules.

## 22.2 Tracking usage

Settings > Subscription shows the edition, the number of billed active employees and add-ons. Deactivate departed employees promptly to avoid paying for unused licenses.

↑ Back to index

# 23. Deployment checklist

## 23.1 Before going live

- ☐ Company profile, locations, departments and designations configured
- ☐ Roles and permissions defined, sensitive fields protected
- ☐ Employee records imported and validated
- ☐ Managers assigned and org chart checked
- ☐ Leave types and policies configured and holidays added
- ☐ Attendance and shift policies and check-in methods tested
- ☐ Timesheets and projects configured
- ☐ Approval workflows tested
- ☐ Onboarding and exit processes defined
- ☐ Integrations (Recruit, Payroll or existing payroll, Books) configured
- ☐ Privacy measures (Law 25) documented
- ☐ Employees and managers trained and documentation delivered

> **Nuagix tip —** Nuagix can support your team with Zoho People setup, integration and training. Book a Zoom meeting: https://nuagix.zohobookings.com/#/andre-martin

↑ Back to index

# Appendix

A. English-French glossary

↑ Back to index

# A. English-French glossary

## A.1 Interface terms

| English (interface) | French |
|---|---|
| **Employee Profile** | Dossier employé |
| **Organization Chart** | Organigramme |
| **Self-Service** | Libre-service |
| **Attendance** | Présences |
| **Check-in / Check-out** | Pointer l'arrivée / le départ |
| **Regularization** | Régularisation |
| **Leave** | Congé |
| **Apply Leave** | Demander un congé |
| **Holiday** | Jour férié |
| **Timesheet** | Feuille de temps |
| **Time Log** | Journal de temps |
| **Shift** | Quart de travail |
| **Appraisal** | Évaluation |
| **Goal** | Objectif |
| **Learning** | Formation |
| **Onboarding** | Intégration |
| **Exit / Offboarding** | Départ |
| **Case** | Cas RH |
| **Approval** | Flux d'approbation |
| **User Access Control** | Contrôle d'accès |

↑ Back to index