IT technicians · Zoho One optimization

Zoho Analytics

User and Administrator Manual

→ Go to the index

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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

↑ Back to index

1. Introduction and access

1.1 About this manual

This manual describes the Zoho Analytics features available to users and the functions reserved for administrators, as available in September 2026.

Available features vary by edition (Free, Basic, Standard, Premium, Enterprise) and by your role in the organization.

1.2 What is Zoho Analytics?

Zoho Analytics is Zoho's business intelligence (BI) and data analytics platform. It brings together data from your Zoho apps (CRM, Books, Desk, Projects, etc.), your databases, your files and third-party apps, then lets you build reports, dashboards and AI-assisted analyses (Zia), without programming.

For an SMB, it is the tool that shows sales, profitability, customer service and operations in one place.

1.3 Signing in

1. Go to https://analytics.zoho.com (or https://analytics.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 Analytics.
4. Complete multi-factor authentication with Zoho OneAuth if required.
5. Choose the organization, then the workspace to open.

> **Nuagix tip —** Install the Zoho Analytics mobile app (or the Dashboards app) to view your key metrics on your phone.

↑ Back to index

2. Interface and navigation

2.1 Interface elements

Element	Purpose
Home	Recent workspaces, favourites and items shared with you
Workspace	Container for a subject's tables, reports and dashboards
Explorer	List of all objects in a workspace, by type or folder
Create	New table, report, dashboard, query table or formula
Ask Zia	Ask a plain-language question about your data
Share	Share, publish or embed an object
Settings	Users, roles, branding and organization settings

2.2 Object types

Object	Description
Table	Imported or synchronized data
Query Table	Virtual table built from an SQL query
Chart	Visualization: bars, lines, pie, map, etc.
Pivot View	Matrix summary of the data
Summary View	Grouped data with totals
Tabular View	Detailed filtered list of the data
Dashboard	Collection of reports and KPI widgets

↑ Back to index

3. Workspaces

3.1 Creating a workspace

1. Home > Create > New Workspace.
2. Choose the source: Zoho app connector, database, file or blank workspace.
3. Name the workspace and add a description.
4. Import the data, then organize objects in folders.

3.2 Organizing a workspace

- One workspace per analysis area (e.g., CRM Sales, Books Finance, Desk Service)
- Folders to classify reports by team or use
- Favourites and default views to quickly find key dashboards
- A description on every report explaining its source and calculations

> **Nuagix tip —** Name reports clearly and consistently, for example “SAL – Pipeline by stage – monthly”: your users will find information without asking you.

↑ Back to index

4. Import and connectors

4.1 Data sources

Source	Examples
Zoho apps	CRM, Books, Desk, Projects, People, Campaigns, SalesIQ, Inventory, Survey, Forms
Third-party apps	Google Analytics, Google Ads, Meta, QuickBooks, Salesforce, HubSpot, Shopify and 250+ connectors
Databases	MySQL, SQL Server, PostgreSQL, Oracle, cloud warehouses (Snowflake, BigQuery, Redshift)
Files	Excel, CSV, JSON, HTML, files on WorkDrive, Google Drive, OneDrive, Dropbox or FTP
Feeds and API	Feed URLs, import API, manually entered data

4.2 Importing from a Zoho app

1. Create > New Workspace > choose the app (e.g., Zoho CRM).
2. Authorize the connection with an account that has access to the data.
3. Select the modules and fields to import.
4. Choose the synchronization frequency.
5. Start the import: Zoho Analytics creates the tables, relationships and ready-to-use reports.

> **Note —** Zoho connectors automatically create dozens of starter reports and dashboards. Use them as a starting point rather than building everything yourself.

4.3 Importing a file

1. In the workspace, Create > New Table > Import Data.
2. Choose the file (Excel, CSV) or cloud location.
3. Check the detected column types (text, number, currency, date).
4. Choose the action: append, replace or update based on a key column.
5. If needed, schedule an automatic re-import from the cloud location.

↑ Back to index

5. Synchronization and data preparation

5.1 Synchronization

- Sync frequency depending on connector and edition (e.g., hourly, every 3 hours, daily)
- Manual on-demand synchronization (Sync Now)
- Sync history and alert email on failure
- Zoho Databridge agent for on-premises databases behind a firewall

5.2 Preparing data (DataPrep)

1. From a table, open Prepare Data or the Zoho DataPrep app.
2. Let Zia suggest fixes: duplicates, missing values, inconsistent formats.
3. Apply transformations: split, merge, rename, filter, pivot.
4. Enrich the data (e.g., region from a postal code).
5. Save the pipeline; it runs automatically at each synchronization.

> **Nuagix tip —** Normalize Quebec postal codes (format “H2X 1Y4”) and region names during preparation: your maps and groupings will be reliable.

↑ Back to index

6. Tables, relationships and query tables

6.1 Relationships between tables

1. Open the table and switch to Edit Design.
2. Select the key column and choose Lookup Column.
3. Specify the related table and column (e.g., Invoices.Customer_ID to Customers.ID).
4. Save; reports can now combine both tables.
5. Check the data model diagram to validate the links.

> **Note —** Zoho connectors create relationships automatically, including across apps (e.g., CRM and Books) if you bring them into the same workspace.

6.2 Query Tables

1. Create > Query Table.
2. Write an SQL query (SELECT, JOIN, GROUP BY, UNION) on the workspace tables.
3. Run the query to check the result.
4. Save; the query table is used like a table to build reports.

> **Caution —** Nested query tables and joins on large volumes can slow reports down. Limit columns and filter data as early as possible.

↑ Back to index

7. Formulas

7.1 Formula types

Type	Use
Formula Column	New column calculated row by row (e.g., Amount before tax = Total / 1.14975)
Aggregate Formula	Metric calculated over the whole data set (e.g., conversion rate, gross margin %)
Workspace-level metrics	Metric reusable across several reports
Query parameters	Variable values used in filters and formulas

7.2 Creating an aggregate formula

1. Open the table > Add > Aggregate Formula.
2. Name the formula (e.g., Gross Margin %).
3. Enter the expression, for example (sum("Revenue") - sum("Cost")) / sum("Revenue") * 100.
4. Choose the format (percentage, CAD currency, number of decimals).
5. Use it in your charts, pivot views and widgets.

> **Nuagix tip —** Document every formula in its description: when two teams calculate “margin” differently, dashboards lose their credibility.

↑ Back to index

8. Reports

8.1 Creating a chart

1. Create > Chart View and choose the base table.
2. Drag columns to the X and Y axes, and if needed to Color, Text or Size.
3. Choose the aggregation function (sum, average, count, distinct count).
4. Change the chart type: bar, line, pie, funnel, geo map, combination.
5. Add filters and User Filters to allow exploration.
6. Save in a folder.

8.2 Pivot, summary and tabular views

- Pivot View: rows, columns and values, with subtotals and totals
- Summary View: grouping and totals by category
- Tabular View: detailed list for export or verification
- Conditional formatting to highlight variances
- Drill Down to detailed data

8.3 Advanced analysis

- Period comparisons: current month vs previous month, year over year
- Forecasts and trends
- What-If Analysis
- Cohort and funnel analysis, depending on the report

↑ Back to index

9. Dashboards

9.1 Creating a dashboard

1. Create > Dashboard.
2. Drag existing reports from the left panel.
3. Add KPI Widgets: key figure, trend, gauge, target.
4. Add dashboard filters that apply to all reports (period, region, sales rep).
5. Arrange the layout and use tabs to separate topics.
6. Save and share it.

9.2 Design best practices

- Place the 4 to 6 key metrics at the top
- One dashboard per audience: management, sales, finance, service
- Use consistent colours for the same data
- Avoid more than 10 to 12 reports per tab to keep loading fast
- Show the date of the last synchronization

↑ Back to index

10. Zia Insights and Ask Zia

10.1 Ask Zia

1. Click Ask Zia in the workspace.
2. Ask a plain-language question (e.g., “Sales by region last quarter”).
3. Zia produces a report; adjust the chart type as needed.
4. Save the result as a report or add it to a dashboard.

> **Note —** Ask Zia works best with clear column names. Add synonyms in Zia settings for terms specific to your business.

10.2 Zia Insights and other AI features

- Zia Insights: automatic explanations of significant changes in a report
- Auto-generated reports from a table
- Anomaly detection and forecasts
- Plain-language summaries of a dashboard
- Integration of generative AI models, depending on the organization's configuration

↑ Back to index

11. Sharing, alerts and scheduled emails

11.1 Sharing a report or dashboard

1. Open the object > Share.
2. Add users or groups.
3. Choose permissions: read, export, drill down, edit.
4. Add sharing filters to limit data (e.g., each sales rep only sees their region).
5. Send the invitation.

11.2 Data Alerts

1. Open the report > Data Alerts > New Alert.
2. Define the condition (e.g., overdue receivables above $50,000).
3. Choose the check frequency.
4. Specify the recipients (email, notification, Zoho Cliq).

11.3 Scheduling report emails

1. Open the dashboard > Email > Schedule.
2. Choose the format: PDF, image, Excel or HTML.
3. Specify the recipients and frequency (daily, weekly, monthly).
4. Add a message and save.

> **Nuagix tip —** Schedule the management dashboard every Monday at 7 a.m.: the management meeting starts with up-to-date figures.

↑ Back to index

12. Mobile app

12.1 Features

- View dashboards and reports, with filters
- Ask Zia questions by typing or by voice
- Receive data alerts
- Annotate and share a report
- Dashboards app to display your metrics on a TV or tablet

↑ Back to index

13. Best practices

13.1 Nuagix recommendations

- Start from the Zoho connectors' prebuilt reports before creating new ones
- Define a single version of each metric (sales, margin, conversion rate)
- Check data quality at the source rather than fixing it in reports
- Use sharing filters rather than duplicating reports per team
- Show amounts in CAD and state whether they include GST and QST
- Clean up unused reports every quarter
- Write titles and descriptions in French for Quebec users

↑ Back to index

Part 2 — Administrator Guide

↑ Back to index

14. Users and roles

14.1 Roles

Role	Permissions
Account Admin	Subscription owner: all rights, billing
Organization Admin	Manages users, workspaces and settings
Workspace Admin	Manages a workspace: data, reports, sharing
User	Creates and views objects according to granted permissions
Viewer	Views shared reports and dashboards

14.2 Adding a user

1. Settings > Manage Users > Add Users.
2. Enter the email addresses.
3. Choose the role.
4. Share the relevant workspaces, folders or dashboards.
5. The user receives an invitation; they use a license once active.

> **Note —** In Zoho One, first add the user in the Zoho One console and assign them the Analytics app.

14.3 When an employee leaves

1. Transfer ownership of their workspaces, reports and query tables to another user.
2. Check the connectors and syncs authorized with their account and re-authorize them with a service account.
3. Reassign their scheduled emails and alerts.
4. Remove the user to free the license.

> **Caution —** A sync authorized with a departed employee's account stops working: your dashboards will no longer be up to date.

↑ Back to index

15. Permissions and data security

15.1 Access controls

Mechanism	Effect
Per-object sharing	Access to a specific table, report or dashboard
Detailed permissions	Read, export, drill down, edit, share
Sharing Filters	Row-level security: each user only sees their own data
Groups	Share with an entire team in one operation
Column hiding	Hide sensitive columns from unauthorized users

> **Nuagix tip —** Create groups per team (Sales, Finance, Management) and share with groups rather than individuals: access management becomes much simpler.

↑ Back to index

16. Organization settings

16.1 General settings

- Organization name, logo and language
- Time zone, date format and currency (CAD)
- Fiscal year start for quarterly groupings
- Default chart colour themes
- Email settings for scheduled emails

16.2 Connection management

- List of active connectors and the account authorizing them
- Sync frequencies and error history
- Zoho Databridge setup for on-premises sources
- Row usage and limits depending on edition

↑ Back to index

17. Embedding, publishing and white label

17.1 Publishing and embedding

Option	Use
Private link	Access URL without sign-in, for a restricted audience
Embed	Iframe code to insert a report in a website, intranet or app
Embedding in Zoho CRM, Desk, Projects	Analytics tabs and widgets inside Zoho apps
Zoho Sites and Zoho Show	Reports in a website or presentation
API	Export data or integrate programmatically

Caution — A public or private link grants access without authentication. Never use this option for confidential personal or financial data.

17.2 White label portal

1. Settings > White Label, depending on edition or add-on.
2. Configure your domain (e.g., reports.yourcompany.ca) and your logo.
3. Customize colours, emails and the sign-in page.
4. Invite your customers or partners into their own space with sharing filters.
5. Use it to offer dashboards to your customers under your brand.

↑ Back to index

18. Integrations

18.1 Zoho integrations

Application	Typical use
Zoho CRM	Pipeline, forecasts, sales rep performance, conversion funnel
Zoho Books	Revenue, expenses, receivables, profitability, GST and QST collected
Zoho Desk	Ticket volume, response times, satisfaction
Zoho Projects	Hours, budgets, project profitability
Zoho People	Headcount, attendance, turnover
Zoho Campaigns / Marketing Automation	Campaign performance and attribution
Zoho DataPrep	Data preparation and cleansing

18.2 Other integrations

- 250+ connectors: advertising, e-commerce, accounting, databases
- Cloud data warehouses
- Microsoft Teams, Slack and Zoho Cliq for notifications
- REST API (OAuth 2.0) for import and export
- Zoho Flow to trigger actions

↑ Back to index

19. Security and compliance

19.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Access restriction by IP address, depending on edition
- Encryption of data in transit and at rest
- Audit Log of access and changes
- Workspace backup and restore
- Hosting in the Canadian data center (zohocloud.ca)

19.2 Privacy and Quebec Law 25

- Import only the columns needed for analysis; exclude unnecessary personal information
- Mask or anonymize sensitive data (email, phone, SIN) in DataPrep
- Use sharing filters to limit access to personal data
- Disable public links for reports containing personal information
- Document data sources and their owners

> **Note —** This manual is not legal advice. Confirm your obligations with your legal advisor.

↑ Back to index

20. Editions and licenses

20.1 Editions

Edition	For whom
Free	Trial and very small needs: limited users and rows
Basic	Small teams: core connectors and reports
Standard	SMBs: more users and rows, more frequent sync
Premium	Growing organizations: higher limits, advanced features
Enterprise	Large organizations: maximum limits, advanced controls
Zoho One / CRM Plus	Analytics included with the suite's other apps

> **Note —** The number of users and rows and the sync frequency vary by edition. Add-ons (users, rows, white label) can be purchased.

20.2 Tracking usage

Settings > Subscription shows the edition, number of users, rows used and add-ons. Delete unnecessary tables and columns to free up rows.

↑ Back to index

21. Deployment checklist

21.1 Before going live

- ☐ Organization configured: time zone, currency (CAD), fiscal year
- ☐ Users, roles and groups added
- ☐ Zoho connectors and other sources configured with a service account
- ☐ Sync frequencies defined
- ☐ Data prepared and cleansed (DataPrep)
- ☐ Table relationships verified
- ☐ Key metrics and formulas documented
- ☐ Dashboards per audience created
- ☐ Sharing filters and permissions tested
- ☐ Alerts and scheduled emails configured
- ☐ Security and privacy settings (Law 25) verified
- ☐ Users trained and documentation delivered

> **Nuagix tip —** Nuagix can support your team with Zoho Analytics 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
Workspace	Espace de travail
Table	Table
Query Table	Table de requête
Lookup Column	Colonne de recherche
Formula Column	Formule de colonne
Aggregate Formula	Formule d'agrégat
Chart View	Graphique
Pivot View	Tableau croisé
Summary View	Vue résumé
Tabular View	Vue tabulaire
Dashboard	Tableau de bord
KPI Widget	Widget d'indicateur
User Filter	Filtre utilisateur
Sharing Filter	Filtre de partage
Drill Down	Exploration descendante
Sync	Synchronisation
Data Alert	Alerte de données
Scheduled Email	Envoi planifié
White Label	Marque blanche
Embed	Intégrer
Audit Log	Journal d'audit

↑ Back to index