IT technicians · Zoho One optimization

Zoho Projects

User and Administrator Manual

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Prepared by Nuagix · September 2026

nuagix.ca · support@nuagix.ca

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

Index — English version

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APPENDIX

Part 1 — User Guide

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1. Introduction and access

1.1 About this manual

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

Available features vary by edition (Free, Premium, Enterprise, Ultimate) and by your portal's configuration.

1.2 What is Zoho Projects?

Zoho Projects is Zoho's project management software. It lets you plan work (phases, milestones, tasks and dependencies), track progress with Gantt charts and Kanban boards, log time, manage issues, collaborate on documents and control the budget. It integrates with Zoho CRM, Zoho Books, Zoho Desk and the other Zoho One apps.

1.3 Signing in

1. Go to https://projects.zoho.com (or https://projects.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 Projects.
4. Complete multi-factor authentication with Zoho OneAuth if required.
5. If you have access to several portals, choose the right one from the menu at the top left.

> **Nuagix tip —** Install the Zoho Projects mobile app to log time and update tasks from a job site or a customer's office.

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2. Interface and navigation

2.1 Interface elements

Element	Purpose
Home	Personal dashboard: my tasks, my issues, due dates, recent activity
Projects	The portal's projects, by group, status or owner
Work Items	All your tasks and issues across projects
Timesheets	Logging and approving time worked
Reports	Task, issue, workload and budget reports
Collaboration (Feed, Chat, Forums)	Activity feed, chat and project discussions
Search and Zia	Global search and AI assistant
Setup	Portal settings, mostly reserved for administrators

2.2 Project tabs

Tab	Content
Dashboard	Progress, overdue tasks, milestones, workload
Tasks	Task lists, tasks and subtasks, in list, Kanban or Gantt view
Phases	Project milestones and phases
Issues	Tracking of defects, requests and bugs
Timesheets	Time logged on the project
Documents	Project files, linked to WorkDrive
Forums, Pages, Users	Discussions, wiki pages and project members

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3. Portals, projects and templates

3.1 Portal and projects

- The portal is your organization's space: it holds all projects, users and settings
- Each project has an owner, dates, a status, a layout and members
- Project groups classify projects by department, customer or type
- Projects can be public (visible to all portal users) or private (members only)

3.2 Creating a project

1. Click New Project.
2. Choose a project template or start from a blank project.
3. Enter the name, owner, start and end dates, group and layout.
4. Set access (public or private) and add members and client users.
5. Save, then create your phases and task lists or import them.

3.3 Project templates

A template keeps the structure of a typical project: phases, task lists, tasks, dependencies, durations and documents. When you create a project, dates are recalculated from the start date. Save a successful project as a template with the … menu > Save as Template.

> **Nuagix tip —** Create a template for each type of recurring engagement (e.g., implementation, renovation, annual audit): your project managers start in minutes with the same method.

3.4 Importing a project

- Import tasks from a CSV or Excel file
- Import from Microsoft Project (MPP/XML)
- Migrate from other tools (e.g., Jira, Basecamp), depending on the options available

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4. Phases, milestones and task lists

4.1 Organizing the work

Level	Role
Phase / Milestone	Major project stage with an end date and owner (e.g., Analysis, Build, Delivery)
Task List	Group of related tasks, linked to a phase or not
Task	Work to be done, with owner, dates, duration, priority and status
Subtask	Breakdown of a task into finer items

4.2 Creating a phase

1. In the project, open the Phases tab.
2. Click New Phase.
3. Enter the name, owner, start date and end date.
4. Link task lists to the phase.
5. Mark the phase as completed when all its tasks are closed.

4.3 Creating a task list

1. Tasks tab > Add Task List.
2. Name the list and link it to a phase, if needed.
3. Add tasks directly in the list.
4. Reorder lists and tasks by drag and drop.

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5. Tasks, subtasks and dependencies

5.1 Creating a task

1. Tasks tab > New Task, or quick add within a list.
2. Enter the title and description; use an @mention to notify a colleague.
3. Assign one or more owners.
4. Enter start and end dates, duration, planned work (hours) and priority.
5. Add tags, attachments and, if needed, recurrence and reminders.
6. Save; update the status and completion percentage as work progresses.

5.2 Subtasks and recurrence

- Add subtasks from a task's detail page; they can have their own owner and due date
- Subtask progress can roll up into the parent task
- Recurring tasks: daily, weekly, monthly or yearly
- Email or notification reminders before the due date

5.3 Dependencies

Type	Meaning
Finish-to-Start	Task B starts when task A is finished (the most common)
Start-to-Start	B starts at the same time as A
Finish-to-Finish	B finishes at the same time as A
Start-to-Finish	B finishes when A starts

> **Nuagix tip —** Add a lag to dependencies for real waiting times: drying, customer approval, supplier delivery time.

5.4 Statuses and progress

- Customizable statuses per layout (e.g., Open, In Progress, In Review, Closed)
- Critical Path: tasks that delay the project end if they slip, depending on edition
- Baseline: compare the original plan with reality

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6. Gantt, Kanban and other views

6.1 Gantt chart

1. Tasks tab > Gantt Chart view.
2. Drag bars to move or extend a task; dependent tasks shift accordingly.
3. Draw a dependency by linking the end of one bar to the start of another.
4. Show the critical path and baseline to spot variances.
5. Export the Gantt chart to PDF to share it with the customer.

6.2 Kanban board

The Kanban view shows tasks as cards grouped by status, task list or owner. Drag a card from one column to another to change its status. It suits teams that work in a continuous flow.

6.3 Other views

- Classic or plain list view, with groupings and filters
- Saved and shared custom views
- Calendar of tasks and milestones
- Resource Utilization: hours allocated per person and per day
- Whiteboard for visual brainstorming, depending on edition

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7. Timesheets

7.1 Logging your time

1. From a task or issue, start the Timer or click Log Time.
2. Enter the date, hours and a description of the work.
3. Specify whether the time is Billable or Non-billable.
4. Save; the time is added to the week's timesheet.

7.2 Timesheets and approval

- Weekly view of all your hours across projects
- Timesheet submission for manager approval
- Approval or rejection with a comment by the project owner
- Comparison of planned and actual hours
- Multi-user timesheets for managers, depending on edition

> **Nuagix tip —** Set a simple rule: every employee logs their time by Friday at 4 p.m. Billing and profitability analysis depend on it.

7.3 Billing time

Approved billable hours can be pushed to Zoho Books or Zoho Invoice to produce a customer invoice, with the GST and QST taxes and CAD currency configured in the billing app.

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8. Issues

8.1 What issues are for

The Issues module tracks defects, bugs, change requests or deficiencies found during the project or after delivery. Each issue has a severity, status, owner and due date, and can be linked to a task or milestone.

8.2 Reporting an issue

1. Issues tab > Submit Issue.
2. Enter the title and description, and attach screenshots.
3. Choose the severity, classification, affected module and owner.
4. Enter the due date and, if needed, the affected milestone.
5. Save; follow the status (Open, In Progress, Resolved, Closed) and comments.

8.3 Advanced features

- Escalation rules based on service level agreements (SLA)
- Issue creation by email (project alias address)
- Zoho Desk links: a support ticket can become a project issue
- Issue reports by severity, status and owner

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9. Documents, forums and collaboration

9.1 Documents

- Documents tab: project folders and files, stored in Zoho WorkDrive
- Online editing with Zoho Writer, Sheet and Show
- Version management and comments on files
- Attachments directly on tasks and issues

9.2 Forums, feed and chat

Tool	Use
Feed	Project activity feed and status updates
Forums	Structured discussions by topic, with categories
Pages	Project wiki: procedures, minutes, decisions
Chat	Instant project conversation, linked to Zoho Cliq
@mentions	Notify a colleague in a task, comment or forum

> **Nuagix tip —** Record important decisions in a page or forum rather than in chat: they stay easy to find for the whole team.

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10. Zia, the AI assistant

10.1 Zia features

- Drafting and rewording task, issue and comment descriptions
- Creating tasks from a plain-language description
- Summarizing tasks, comments and project progress
- Smart search and translation
- Voice note transcription
- Related item suggestions and progress insights

> **Note —** Zia features vary by edition and must be enabled by the administrator. Always review generated content before sharing it.

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11. Reports and dashboards

11.1 Available reports

Report	Purpose
Task reports	Tasks by status, owner, priority or delay
Issue reports	Issues by severity, status and resolution time
Resource Utilization	Allocated hours versus availability
Planned vs Actual	Date and hour variances
Timesheets	Billable and non-billable hours by project and person
Budget and earned value	Costs, revenue, variances and earned value indicators

11.2 Dashboards

1. Open the project dashboard or the Portfolio Dashboard.
2. Add widgets: progress, overdue tasks, milestones, hours, budget.
3. Filter by project group, owner or period.
4. Share the dashboard or export it as needed.
5. For cross-app analysis (e.g., profitability by customer), use Zoho Analytics.

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12. Mobile app

12.1 Features

- View and update tasks, subtasks and issues
- Start a timer and log time
- Attach photos taken in the field
- Receive notifications and reply to comments
- View the Gantt chart, milestones and documents
- Use home screen widgets for today's tasks

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13. Best practices

13.1 Nuagix recommendations

- Start every project from a proven template
- Assign a single main owner per task, even when several people work on it
- Enter planned work (hours) so that workload reports are reliable
- Link tasks with dependencies rather than managing dates by hand
- Save a baseline before kickoff to measure variances
- Log your time every day, while it is still fresh
- Review overdue tasks and the critical path every week
- Write communications to Quebec customers in French

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Part 2 — Administrator Guide

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14. Users, profiles and roles

14.1 Key concepts

Element	Controls
Profile	What a user can do: create, edit, delete tasks, issues, documents, timesheets; setup access
Role	Hierarchical position in the portal, which determines data visibility (e.g., manager, member)
Portal administrator	Full access to setup and all projects
Project Owner	Manages members, settings and hour approval for their project
Read-only user	Views without editing; number included depends on edition

14.2 Adding a user

1. Setup > Manage Users > Portal Users > Add User.
2. Enter the email address.
3. Assign the profile and role.
4. Enter the hourly rate (cost and billing) if you track the budget.
5. Add them to the relevant projects; they receive an email invitation.

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

14.3 When an employee leaves

1. Reassign their open tasks and issues to another member (filter by owner, then mass update).
2. Transfer ownership of their projects to another owner.
3. Approve or reject their pending timesheets.
4. Update automations and Blueprints that name them.
5. Deactivate or remove the user from the portal to free the license.

> **Caution —** Removing a user without reassigning their work leaves tasks without an owner and skews workload reports.

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15. Client users and external sharing

15.1 Client users

Client users are external people (your customers) invited to one or more projects. They access a limited view: the tasks, milestones, documents, forums or issues you choose to show them. They do not use an employee license, depending on edition.

15.2 Inviting a client

1. Setup > Manage Users > Client Users.
2. Add the client company and the person's email address.
3. Choose the client profile, which defines what they can see and do.
4. Associate the client with the relevant projects.
5. Customize the portal (logo, custom domain) for a branded experience, depending on edition.

> **Nuagix tip —** Hide internal tasks, hours and hourly rates from clients. Create a “Client” task list for items they must complete themselves (e.g., provide access, approve a mockup).

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16. Portal settings

16.1 General settings

- Portal name, logo, language, time zone and date format
- Currency (CAD) and default hourly rates
- Business hours, Quebec statutory holidays and non-working days
- Custom domain and branding, depending on edition
- Timesheet settings: approval required, future logging allowed, rounding

16.2 Groups and layouts

- Project groups to classify projects
- Project layouts for different fields by project type
- Custom project statuses (e.g., Proposal, Active, On Hold, Completed)

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17. Customization

17.1 Fields and layouts

1. Setup > Customization > Layouts and Fields.
2. Choose the module: Projects, Tasks, Issues or Timesheets.
3. Add the fields you need (text, picklist, date, currency, user, formula, etc.).
4. Define the statuses specific to each layout.
5. Associate the layout with the relevant projects.

17.2 Other options

- Shared custom views
- Tags to classify tasks and issues
- Custom modules to track other items (e.g., risks, deliverables, change requests)
- Project, task and email templates
- Sandbox to validate changes, depending on edition

> **Caution —** Before deleting a field or status, check whether it is used in reports, automations, a Blueprint or an integration.

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18. Blueprint and automations

18.1 Automation tools

Tool	Use
Blueprint	Enforce a step-by-step process on a task or issue, with required fields and actions at each transition
Workflow Rules	Trigger actions (email, field update, webhook, function) on create or edit
Business Rules	Apply actions based on criteria on tasks and issues
Escalation rules (SLA)	Escalate an issue not resolved within the set time
Custom Functions	Deluge logic, API calls to other apps
Webhooks	Notify an external app when an event occurs

18.2 Creating a Blueprint

1. Setup > Automation > Blueprint > New Blueprint.
2. Choose the module (Tasks or Issues) and the layout.
3. Drag statuses into the editor and link them with transitions.
4. For each transition, define who can run it, the mandatory fields and the actions (email, update).
5. Publish the Blueprint and test it in a pilot project.

> **Nuagix tip —** A simple approval Blueprint (Done > In Review > Approved by Customer) ensures deliverable quality without burdening the team.

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19. Budget and profitability

19.1 Budget types

Method	Description
Based on project hours	Budget expressed in hours for the whole project
Based on costs	Dollar budget calculated from resource hourly rates
By phase or by task	Budget split across phases or tasks
Billing rates	Per project, per user or per task, for billable hours

19.2 Setting up the budget

1. Open the project > Project Settings > Budget.
2. Choose the method and enter the amount in CAD or the number of hours.
3. Define cost and billing rates.
4. Set an alert threshold (e.g., 80% of the budget used).
5. Track variances in the budget report and earned value.

> **Note —** GST and QST are applied when invoicing in Zoho Books or Zoho Invoice, not in the project budget.

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20. Integrations

20.1 Zoho integrations

Application	Typical use
Zoho CRM	Create a project when a deal is won; see projects on the account record
Zoho Books / Invoice	Bill hours and expenses; sync customers
Zoho Desk	Turn a support ticket into an issue or task
Zoho WorkDrive	Project document storage
Zoho Cliq	Project chat and notifications
Zoho Sprints	Agile (Scrum) management for development teams
Zoho Analytics	Portfolio and profitability dashboards
Zoho People / Expense	Leave, availability and project expenses

20.2 Integrating with Zoho CRM

1. Setup > Marketplace > Zoho Apps > Zoho CRM.
2. Authorize the connection with a CRM administrator account.
3. Choose the associated module (Deals or Accounts).
4. From a won deal, create the project from a template.
5. Sales teams see progress on the CRM record.

20.3 Other integrations

- Google Workspace and Microsoft 365 (calendar, documents)
- Slack, GitHub, Dropbox, Box
- Zoho Flow and Zapier to connect other apps
- REST API (OAuth 2.0) and webhooks

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21. Security and compliance

21.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory, depending on edition
- Private projects and profiles restricting data access
- Client user access limited to shared items only
- Audit Log of actions in the portal
- Recycle bin to restore deleted items for a limited time
- Hosting in the Canadian data center (zohocloud.ca)

21.2 Privacy and Quebec Law 25

- Limit personal information entered in tasks and documents
- Restrict hourly rates and salary data to authorized profiles
- Remove client user access at the end of the engagement
- Set a retention period for archived projects
- Document where customer documents are stored

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

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22. Editions and licenses

22.1 Editions

Edition	For whom
Free	Very small teams: limited number of users and projects
Premium	SMBs: unlimited projects, Blueprint, timesheets, budget, custom views, Zia
Enterprise	Organizations: custom roles and profiles, SSO, portfolio dashboard, critical path
Ultimate	Advanced needs: higher limits, multi-user timesheets, extended automation
Zoho One	Projects included with the suite's other apps

22.2 Tracking usage

Setup > Billing shows the edition, licenses used, read-only users and storage. Remove licenses from users who have left the organization.

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23. Deployment checklist

23.1 Before going live

- ☐ Portal configured: name, logo, time zone, currency (CAD), holidays
- ☐ Profiles, roles and users added
- ☐ Project groups and layouts defined
- ☐ Custom fields and statuses created
- ☐ Project templates prepared for recurring engagements
- ☐ Hourly rates and budget method set
- ☐ Timesheet rules and approval configured
- ☐ Blueprint and automations tested in a pilot project
- ☐ Integrations (CRM, Books, Desk, WorkDrive) configured
- ☐ Client user access validated
- ☐ Security and privacy settings (Law 25) verified
- ☐ Users trained and documentation delivered

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

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Appendix

A. English-French glossary

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A. English-French glossary

A.1 Interface terms

English (interface)	French
Portal	Portail
Project	Projet
Template	Modèle
Phase / Milestone	Phase / jalon
Task List	Liste de tâches
Task	Tâche
Subtask	Sous-tâche
Dependency	Dépendance
Gantt Chart	Diagramme de Gantt
Critical Path	Chemin critique
Baseline	Référence
Timesheet	Feuille de temps
Billable	Facturable
Issue	Problème
Severity	Gravité
Client User	Client utilisateur
Profile	Profil
Role	Rôle
Layout	Disposition
Business Rule	Règle d'affaires
Audit Log	Journal d'audit

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