



IT technicians · Zoho One optimization



Zoho WorkDrive

User and Administrator Manual

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Index — English version

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1. Introduction and access

1.1 About this manual

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

Available features vary by edition (Starter, Team, Business, Enterprise, or included in Zoho Workplace and Zoho One) and by your organization's configuration.

1.2 What is Zoho WorkDrive?

Zoho WorkDrive is Zoho's file management and collaboration platform. It replaces the file server and shared drives: documents are stored in Team Folders that belong to the organization, not to individuals. WorkDrive includes the Zoho Writer, Sheet and Show editors, desktop sync (TrueSync), secure external sharing, version history and complete administration tools.

1.3 Signing in

1. Go to <https://workdrive.zoho.com> (or <https://workdrive.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 or Zoho Workplace, open the app launcher and select WorkDrive.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — Install WorkDrive TrueSync on your computer from the start: you will find your folders in Windows Explorer or Finder without changing your habits.

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2. Interface and navigation

2.1 Interface elements

Element	Purpose
Team Folders	Shared spaces for a team or project; files belong to the organization
My Folders	Personal space for drafts and working documents
Shared with Me	Files and folders others have shared with you
Favorites and recents	Quick access to starred items and recently opened files
Unread	Files added or changed in your Team Folders since your last visit
Trash	Deleted items, restorable for a limited time
Search	Search by name, content, type, owner, label or date

2.2 Views and actions

- List or grid (thumbnail) view
- Info pane: details, activity, versions, comments and sharing for the selected file
- Context menu (right-click): open, share, move, copy, rename, download, delete
- Drag and drop to upload or move files
- Preview of more than 200 file types without downloading

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3. Files and folders

3.1 Creating and uploading

1. Open the Team Folder or folder you want.
2. Click New to create a folder, a Writer document, a Sheet spreadsheet or a Show presentation.
3. To add existing files, click Upload > Files or Folder, or drag them into the window.
4. Track upload progress in the panel at the bottom of the screen.

3.2 Organizing

- Move or copy between folders and Team Folders (depending on your role)
- Rename with a clear convention (e.g., YYYY-MM-DD_Customer_Document)
- Star frequently used files as favorites
- Color folders to spot them quickly
- Pin important files at the top of a folder
- Download an entire folder as a ZIP file

Nuagix tip — Agree on a common folder structure (e.g., Customers > Customer name > Quotes, Contracts, Invoices) before migrating your files: it is the number one success factor.

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4. Team Folders and My Folders

4.1 Differences

Space	Characteristics
Team Folder	Belongs to the organization; members with roles; files stay in place if an employee leaves
My Folders	Personal space; files visible only to you unless shared
Public Team Folder	Visible to all WorkDrive team members, who can join it
Private Team Folder	Accessible only to added members

4.2 Roles in a Team Folder

Role	Permissions
Admin	Manages members and settings; all actions on files
Organizer	Adds members (except admins); adds, edits, moves and shares files
Editor	Views, adds, edits, copies and renames; cannot share, move or delete
Commenter	Views, copies, comments and downloads
Viewer	Views, copies, downloads and syncs (download may be restricted)

Note — Roles are specific to each Team Folder: the same person can be an editor in one folder and a viewer in another.

4.3 Requesting access or creating a Team Folder

1. Click Team Folders > + (New Team Folder), if the administrator allows it.
2. Name the folder, add a description and choose public or private.
3. Add members or groups and assign their roles.
4. For an existing public folder, click Join.

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5. Internal and external sharing

5.1 Sharing with colleagues

1. Select the file or folder > Share.
2. Enter the name of a colleague or group.
3. Choose the permission: view, comment, edit, or organize.
4. Add a message and share; the colleague finds the item in Shared with Me.

5.2 Share links

Link type	Use
Internal link	Accessible only to signed-in organization members
External link	Accessible to outside people, according to organization policies
Password and expiry	Protect an external link and limit its lifetime
Download restriction	Allow viewing without downloading
File Request / Upload	Receive files from a customer without giving access to the folder

Nuagix tip — To receive documents from a customer (statements, receipts), use an upload link with an expiry date rather than email.

5.3 External collaborators

- Invite an external collaborator into a Team Folder, depending on edition and policies
- Watermark on files viewed externally, depending on edition
- Tracking of external link access (views, downloads)
- Disable a link in one click

Caution — Any external link without a password can be forwarded. Set an expiry date on links containing confidential information.

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6. Collaboration and editors

6.1 Built-in editors

Editor	Formats
Zoho Writer	Documents (DOCX, ODT, TXT), mail merge and signature
Zoho Sheet	Spreadsheets (XLSX, ODS, CSV)
Zoho Show	Presentations (PPTX, ODP)
Preview	PDF, images, videos, CAD files and more than 200 formats
Microsoft Office	Open in Office desktop or online apps, depending on configuration

6.2 Working together

- Real-time co-editing in Writer, Sheet and Show
- Comments and @mentions on files, including PDFs and images
- Lock a file while editing to avoid conflicts
- Activity stream: who viewed, edited, moved or shared
- Notifications on followed folders

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7. Versions and trash

7.1 Version history

1. Select the file and open the info pane > Versions.
2. Review the list of versions with author and date.
3. Open a version to compare it, or add a version note.
4. Click Make Current to restore an earlier version.

Note — Uploading a file with the same name creates a new version rather than a duplicate. The number of versions kept depends on edition and settings.

7.2 Trash

- Items deleted from a Team Folder go to that folder's trash
- Items from My Folders go to your personal trash
- One-click restore to the original location
- Permanent deletion after the retention period, or manually by an administrator

Caution — Emptying the trash is irreversible. If in doubt, ask the administrator to check recovery options.

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8. Syncing with TrueSync

8.1 Installing and configuring

1. Download WorkDrive TrueSync for Windows, macOS or Linux from your profile menu or Zoho's website.
2. Sign in with your account; the WorkDrive drive appears in Explorer or Finder.
3. Browse your Team Folders and My Folders like a local drive.
4. Choose the folders to make available offline (right-click > Make available offline).

8.2 TrueSync principles

- Online-only files: shown without using disk space, downloaded when opened
- Offline files: local copy synced automatically
- Changes saved to WorkDrive with version history
- Status icons: synced, in progress, offline, conflict
- Open files in your desktop applications (Word, Excel, AutoCAD, etc.)

Nuagix tip — Make only daily-use folders available offline: you save disk space and reduce risk if the computer is stolen.

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9. Search, labels and Zia

9.1 Finding a file

- Search by name and within document content
- Text recognition in images and scanned PDFs (OCR), depending on edition
- Filters: file type, owner, Team Folder, modification period, label
- Recent searches and suggestions

9.2 Labels and metadata

1. Select one or more files > Labels.
2. Choose an existing label (e.g., Confidential, To Sign, Final) or create one if you have permission.
3. Fill in any metadata fields defined by the administrator (e.g., customer number, fiscal year).
4. Then filter searches by label or metadata value.

9.3 Zia in WorkDrive

- Smart search and suggestions of relevant files
- Document summaries and answers to questions about their content, depending on edition
- Image content detection for search
- Label and filing suggestions

Note — Zia features vary by edition and by the settings enabled by the administrator.

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10. Mobile app

10.1 Features

- View, upload and share files on iOS and Android
- Scan paper documents to PDF with the camera
- Automatically upload photos, depending on settings
- Make files available offline
- Comment and reply to mentions
- App lock with passcode or biometrics

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11. Best practices

11.1 Nuagix recommendations

- Store business documents in Team Folders, not in My Folders
- Adopt a common naming convention and folder structure
- Share with a WorkDrive link rather than as an attachment: a single up-to-date version
- Set a password and expiry on external links
- Use Confidential and Final labels to clarify document status
- Avoid unnecessary local copies: use TrueSync online-only files
- Avoid special characters (/ , \ , : , *) in file names to make syncing easier

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12. Members and roles

12.1 WorkDrive team roles

Role	Rights
Super Admin	Team owner: full access, billing, ownership transfer
Admin	Manages members, Team Folders, policies and reports
Member	Uses WorkDrive according to the Team Folders they belong to
External collaborator / guest	Limited access to the Team Folders they are invited to, depending on edition

12.2 Adding a member

1. Admin Console > Manage > Members > Add Members.
2. Enter email addresses, or import a CSV file.
3. Assign the role (member or administrator).
4. Add them to the appropriate groups and Team Folders.

Note — In Zoho One or Zoho Workplace, first add the user in the Zoho One (or Workplace) console and assign them WorkDrive.

12.3 When an employee leaves

1. Admin Console > Members > select the employee > Deactivate or Delete.
2. Transfer the contents of My Folders to another member (or to a Team Folder).
3. Reassign the admin roles of the Team Folders they managed.
4. Review and disable the external links they created.
5. Sign out their TrueSync and mobile devices, then free the license.

Caution — Deleting a member without transferring My Folders loses their personal files after the grace period.

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13. Managing Team Folders

13.1 Team Folder settings

- Visibility: public (anyone can join) or private (by invitation)
- Members, groups and roles
- Restrictions: download, print, copy and external sharing for this folder
- Notifications and activity stream
- Archiving a completed Team Folder (closed project)

13.2 Controlling creation

1. Admin Console > Team Folder settings.
2. Define who can create Team Folders: all members or administrators only.
3. Enforce private folders by default if needed.
4. Review the list of all Team Folders, including those without an active admin.

Nuagix tip — Structure Team Folders by department (Management, Accounting, Sales, HR) and add groups rather than individuals: arrivals and departures are handled in one place.

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14. Sharing policies

14.1 Available controls

Policy	Effect
External sharing	Allow, restrict or block links and invitations to outsiders
Allowed or blocked domains	Limit external sharing to certain domains (e.g., your partners')
Mandatory password and expiry	Enforce protection on external links
Download and print	Restrict for external links or certain folders
File requests	Allow or block upload links
Group policies	Apply different rules by department

14.2 Setting the policy

1. Admin Console > Sharing Policies.
2. Choose the organization's default policy.
3. Create exceptions for groups that often share externally (e.g., Sales).
4. Communicate the rules to users.

Nuagix tip — A common small-business policy: external sharing allowed, but password required and a maximum expiry of 30 days.

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15. Storage and data management

15.1 Managing storage

- Admin dashboard: space used per Team Folder and per member
- Storage quotas per Team Folder or per user, depending on edition
- Identify large files and inactive folders
- Add extra storage depending on the subscription

15.2 Migrating to WorkDrive

Source	Method
File server or local drive	TrueSync or folder upload
Google Drive	WorkDrive migration tool
OneDrive / SharePoint	WorkDrive migration tool
Dropbox, Box	WorkDrive migration tool

Caution — Inventory and clean up before migrating: migrating duplicates and outdated files costs time and space.

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16. Audit log and reports

16.1 Audit log

1. Admin Console > Reports > Audit Log.
2. Filter by member, Team Folder, action type (view, download, share, delete) or period.
3. Review unusual activity (mass downloads, external shares).
4. Export the report if needed.

16.2 Useful reports

- Externally shared files and active links
- Member and device activity
- Storage usage
- Sign-ins and synced devices
- Suspicious activity alerts, depending on edition

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17. Data protection

17.1 Protection tools

- Data Loss Prevention (DLP): detect sensitive information and block its sharing, depending on edition
- Retention policies and automatic deletion after a defined period
- Watermark on viewed files
- Restriction of download, print and copy
- Device management: sign out and remote wipe of lost devices
- File recovery after a deletion or ransomware, thanks to versions

17.2 Classifying sensitive documents

1. Create classification labels (Public, Internal, Confidential).
2. Define associated protection rules (e.g., no external link for Confidential).
3. Train users to label documents as soon as they are created.
4. Regularly review the report of confidential files shared.

Note — Availability of these features depends on edition. Check with your Zoho partner before choosing a plan.

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18. Integrations

18.1 Zoho integrations

Application	Typical use
Zoho CRM	A WorkDrive folder per account or deal, accessible from the record
Zoho Projects	Project documents stored in a Team Folder
Zoho Mail	Attach by link and save attachments
Zoho Cliq	Share files in conversations and channels
Zoho Sign	Send a document for signature and file the signed copy
Zoho Books / Expense	File supporting documents
Zoho Desk	Attach documents to support tickets

18.2 Other integrations

- Microsoft Office and Microsoft 365: open and edit Office files
- Slack, Microsoft Teams and Zoom, depending on available extensions
- Scanning apps and multifunction printers
- Zoho Flow and Marketplace
- WorkDrive REST API (OAuth 2.0), SDKs and webhooks

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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
- Encryption of files at rest and in transit
- Complete audit log of file actions
- Sharing and download policies
- Hosting in the Canadian data center (zohocloud.ca)

19.2 Privacy and Quebec Law 25

- Inventory folders containing personal information (HR, customers, medical or financial records)
- Limit access to only the people who need it
- Block password-less external links on those folders
- Set a retention period and delete files that are no longer needed
- Review the audit log in case of a confidentiality incident

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

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20. Editions and licenses

20.1 Editions

Edition	For whom
Starter	Small teams: Team Folders, sharing, versions, basic storage
Team	Growing teams: more storage, sharing controls, TrueSync
Business	Organizations: advanced administration, reports, data protection
Enterprise	Advanced needs: DLP, compliance, higher limits
Zoho Workplace / Zoho One	WorkDrive included with the suite's other apps

20.2 Tracking usage

Admin Console > Subscription shows the edition, licenses used and storage consumed. Storage is generally pooled across the team. Remove licenses from deactivated members.

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21. Deployment checklist

21.1 Before going live

- ☐ WorkDrive team created and administrators appointed
- ☐ Members added and groups created
- ☐ Team Folder structure defined and approved
- ☐ Roles assigned in each Team Folder
- ☐ External sharing policies defined
- ☐ Labels and metadata configured
- ☐ Files migrated (server, Google Drive, OneDrive, Dropbox) and checked
- ☐ TrueSync and mobile apps installed
- ☐ Integrations (CRM, Projects, Mail, Cliq, Sign) configured
- ☐ Multi-factor authentication enabled
- ☐ Folders containing personal information protected (Law 25)
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho WorkDrive 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
Team Folder	Dossier d'équipe
My Folders	Mes dossiers
Shared with Me	Partagé avec moi
Unread	Non lus
Upload	Téléverser
Download	Télécharger
Share	Partager
External Link	Lien externe
File Request	Demande de fichiers
Organizer	Organisateur
Editor	Éditeur
Commenter	Commentateur
Viewer	Lecteur
Label	Étiquette
Version	Version
Trash	Corbeille
Offline	Hors ligne
Admin Console	Console d'administration
Sharing Policy	Politique de partage
Audit Log	Journal d'audit

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