



Zoho Projects

Training Agenda





DURATION

2 DAYS, 4 HOURS PER DAY.

About this course

In this course, you will learn how to plan to-dos, manage them with your team members and clients, log hours in timesheets, and drive your project on the right track. You will also get an opportunity to interact with experts in Zoho Projects and learn some of the best practices to make your projects into a success story.



Who is it for?

This course is for all users who want to manage their project activities, from planning, to tracking progress, to completing the project successfully.



Day 1

Module 1: **Introduction**

- a) Welcome to Zoho Projects
- b) Benefits of Zoho Projects
- c) Creating an account in Zoho Projects

Module 2: **Well planned is half done**

- a) Milestones
- b) Task-lists
- c) Tasks and subtasks
- d) Types of view
- e) Task operations
- f) Task automation
 - i) Blueprint
 - ii) Workflow Rules
- g) Task settings



Day 1

Module 3: **Don't lose track of the time**

- a) Different ways of recording hours
- b) Types of views
- c) Timesheet approval
- d) Timesheet settings

Module 4: **Drive the project on the right track**

- a) Gantt charts
- b) Resource utilization
- c) Planned vs. actual
- d) Task reports

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Hands-on training and Q & A

A green speech bubble icon containing a white letter 'A'.



Day 2

Module 5: **Squash the bugs**

- a) Filing the bugs in the system
- b) Web-to-bug form
- c) Business rules
- d) SLA (Service Level Agreement)
- e) Custom functions
- f) Webhooks and link bugs

Module 6: **Stay on top of what's happening**

- a) Managing your documents
- b) Collaborating with team members
 - i) Forums
 - ii) Feeds
 - iii) Discussions
- c) Pages



Day 2

Module 7: **Behind the scenes**

- a) Personal preferences
- b) Portal configuration
- c) Customization
- d) Data administration
- e) Managing users
- f) Profiles and roles
- g) Managing teams

Module 8: **Marketplace & Zia**



Hands-on training and Q & A



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Thank You !



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