



ZOHO PROJECTS PLUS AGENDA



Summary

Duration: 3 days | 5 hours (Inclusive of breaks)

About the training:

This training program covers the foundations of hybrid project management and how Zoho Projects Plus supports teams running both waterfall and agile workflows at the same time. It includes an overview of key features, practical tips from experts, and hands-on sessions with the suite.

Zoho Projects Plus offers applications like Analytics, WorkDrive, Notebook, and Learn, extending their project management capabilities. Coverage of these applications will focus to their contribution to Zoho Projects Plus only.

Who is it for?

It's open to all Zoho customers interested in learning about Zoho Projects Plus. Whether you're a business owner, administrator, project manager, or team member, this course helps you find your way around the suite and equips you with hybrid project management skills.

Training delivery and format:

Training sessions are delivered in English, using general examples and use cases from popular industries that have adopted hybrid project management practices. These sessions are intended to offer a broad overview with industrial examples; they are not tailored to specific business requirements, and trainers will not be able to assist in customizing your portal.





Module 1 - Introduction to Zoho Projects Plus

- Overview of hybrid project management
- Hybrid project management with Zoho Projects Plus
- Conceptualization with Projects and fundamentals of Agile
- Create account: for existing and new users
- Key differentiators

Module 2 - Application settings directory (Settings) and Dashboards

- Admin profiles and permissions
- Map users to applications
- Individual application settings
- Projects, Sprints, and Analytics dashboards
- Custom dashboards



Module 3 - Fundamentals of Zoho Projects

- Phases
- Task lists
- Tasks and subtasks
- Task operations
- Task settings

Module 4 - Time tracking in Zoho Projects

- Log hours and Timesheets
- Timesheet approval
- Timesheet settings

Module 5 - Built-in reports of Zoho Projects

- Gantt charts
- Workload reports
- Planned vs. actual
- Custom reports

Module 6 - Customization in Zoho Projects

- Custom modules
- Custom layouts



- Custom fields
- Layout rules

Module 7 - Automation in Zoho Projects

- Workflow rules
- Blueprint
- Custom functions

Module 8 - Integration and Marketplace

- Overview of marketplace and extensions
- Integrate to Zoho Apps
- Integrate to third-party apps



Module 9 - Fundamentals of Zoho Sprints

- Introduction to agile project management
- When to choose agile?
- Scrum and Kanban framework



Module 10 - Sprint planning

- Epics
- OKRs
- Work items
- Project backlog
- Sprint backlog
- Budget

Module 11 – Sprint implementation

- Running a sprint
- Scrum board
- Kanban board
- Epics and releases
- CI/CD
- Web Tabs

Module 12 - Collaboration and Timesheet

- Feeds and notifications
- Global view
- Agile meetings
- Logging hours



- Timesheet reports

Module 13 - Customization in Zoho Sprints

- Custom modules
- Custom layouts
- Custom fields

Module 14 - Advanced features

- Dashboards and reports
- Test case management
- Risk and opportunity management
- Expense tracking

Module 15 - Automation in Zoho Sprints

- Custom functions
- Webhooks
- Connections

Module 16 - Integration and Marketplace

- Overview of marketplace and extensions
- Integrate to Zoho Apps
- Integrate to third-party apps



Module 17 - Sync between Projects and Sprints

- Status mapping between Projects and Sprints
- Universal time tracking with Timesheets
- Timesheet approval workflows
- User and team assignment
- Default fields sync



Module 18 - AI in Projects Plus

- Universal search using Zia
- Generative AI in Projects and Sprints
- Zia Insights
- AI in Analytics
- Supported AI tools

Module 19 - Business intelligence and analytics

- Introduction to Analytics
- Capabilities of Analytics in Zoho Projects Plus



- Default reports and dashboards
- Hybrid project dashboard
- Create custom reports and dashboards

Module 20 - Collaborative document management

- Introduction to WorkDrive
- Create, share, and manage files
- Attach files to Projects and Sprints

Module 21 - Note taking and list management

- Introduction to Zoho Notebook
- Notes, sketches, memos, and videos
- Notebook extension for Projects and Sprints

Module 22 - Learning management solution

- Introduction to Zoho Learn
- Create manuals and articles for KB
- Create courses and assessments for evaluation

Module 23– Security and best practices

- User roles, profiles, and permissions



- Data security and access control
- Audit logs and compliance

Module 24– Use cases and practical implementation

- Real-world implementation scenarios
- Industry-specific workflows
- Common pitfalls and how to avoid them

Module 25 – Q&A and hands-on workshop

- Live configuration exercise
- Troubleshooting scenarios
- Open Q&A

