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ZOHO PROJECTS PLUS

AGENDA



Summary

Duration: 2 days | 4 hours 30 mins (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.

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.





Foundation for hybrid projects

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
- Benefits of co-using applications
- Navigation and UI walkthrough

Module 2 - Application settings directory (Settings)

- Admin profiles and permissions
- Map users to applications
- Individual application settings
- Customization: Modules, layouts, fields, layout rules
- Automation: Workflow rules, blueprint, custom functions



Module 3 - Running a hybrid project

- Add new/existing Projects as Sprints and vice versa
- Add new/existing tasks as work items and vice versa
- Default permissions in Projects
- Group, sort, import, and export in Projects and Sprints

Module 4 - 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 5 - Dashboards

- Projects dashboard
- Create custom dashboard
- Sprints dashboard
- Analytics dashboard

Module 6 - Business intelligence and analytics

- Zoho Projects default reports and dashboards
- Zoho Sprints default reports and dashboards



- Hybrid project dashboard
- Create custom reports and dashboards

Module 7 - AI in Projects Plus

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



Bundled applications and advanced features

Module 8 - Collaborative document management

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



Module 9 - Note taking and list management

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

Module 10 - Learning management solution

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

Module 11 – Integration and Marketplace

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

Module 12– Security and best practices

- User roles, profiles, and permissions
- Data security and access control
- Audit logs and compliance

Module 13 – Use cases and practical implementation

- Real-world implementation scenarios



- Industry-specific workflows
- Common pitfalls and how to avoid them

Module 14 – Q&A and hands-on workshop

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

