Zoho Corporation

Tasks - Manage Tasks Across all Projects

The Overview - Tasks section provides a comprehensive view of all open tasks across all projects in a portal. Users can customize their view using a drop-down menu and choose between List, Gantt, or Kanban views. The List and Gantt views allows to group tasks by Task List or Project, while the Kanban view displays tasks as cards. Additionally, users can also add tasks inline directly within these views.

Use cases

Construction: Electrical fittings are to be fitted at the Donally construction site. Adding this as a task in the project helps the workers to ensure that this isn't missed out, and the admins can know the status of the work, the total duration taken to complete it, and many more specific details about this activity.

Travel: Tourism agencies can organize their tour plans with Zoho Projects. Destination can be added as a project. Locations to be visited can be added as Tasks.

Apartment maintenance: Tracking of maintenance activities can be done using Zoho Projects. Tasks to be performed, such as lift routine maintenance, water tank cleaning, and servicing of generators, can be added under Tasks.

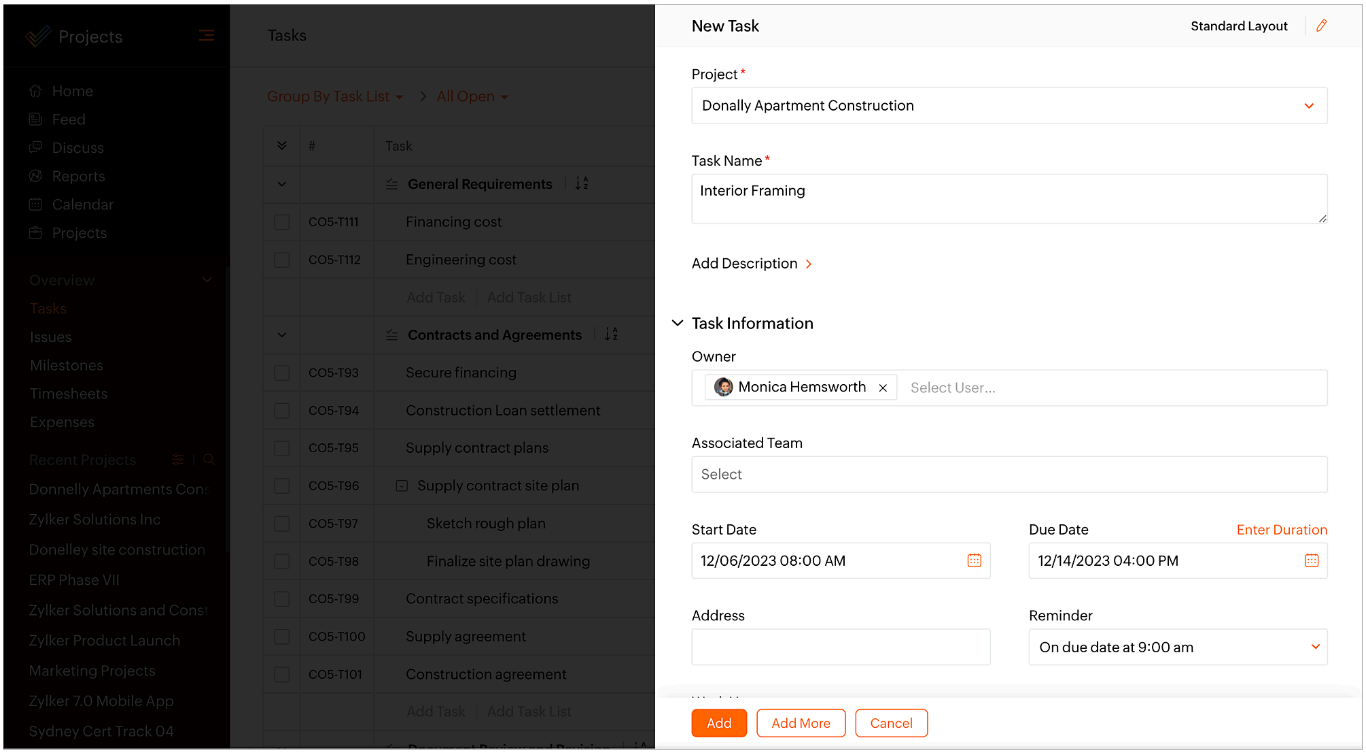
Setting a View as Default

1. Navigate to Overview > Tasks on the left navigation panel.
2. Click on the view selector drop-down.
3. Hover over a view.
4. Click on the ⚓ icon to set a view as default.
    - User will land on this view every time they access the Overview - Tasks section.

Add a Task

1. Navigate to **Overview** > **Tasks** on the left navigation panel.
2. Click on the **Add Task** button.
3. Select a project from the drop-down.
4. Add a Task name.
5. Select an Owner to handle the task.

6. Fill in the other fields (both default and custom fields will be shown on the form) and then click Add.
7. Click **Add More** to add more tasks.



Manage Columns

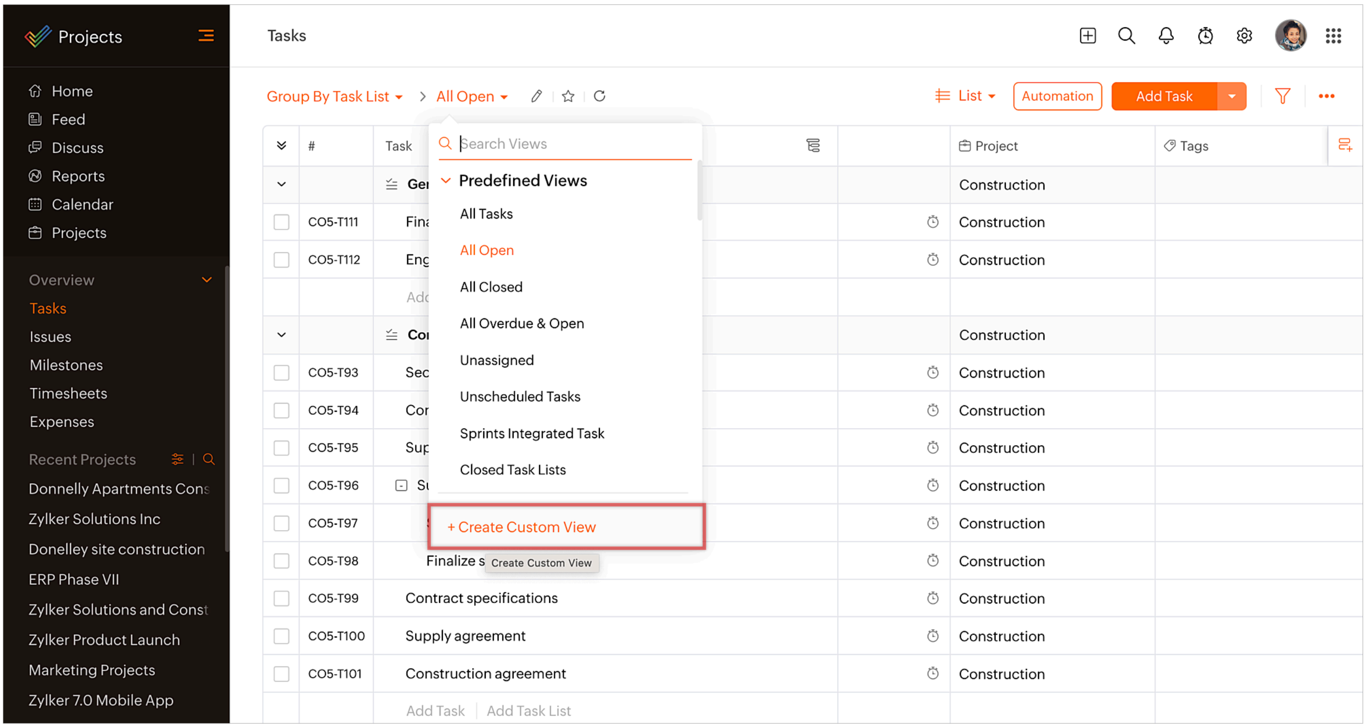
1. Click on the add column icon ().
2. Hover over the field and click **Add**.
3. The column will be automatically added.
4. Drag and drop the columns headers to reorder.
5. Click the column header, drag and drop the column to reorder.
6. Right click on the column header to Insert Column Before, Insert Column After or Hide Column.

Custom Views

Users can [create customized views] and save them for quick reference. For eg; user can view all high priority tasks assigned to them as a default view.

1. Navigate to **Overview** > **Tasks** on the left navigation panel.
2. Click on the default views drop-down.

3. Click **+Create Custom View**.



4. Select criteria for the custom view.
   Users can select multiple criteria. The custom view will display issues if they match the criteria.
5. Select the AND operator if all the criteria are to be TRUE. Select OR operator if either of the criteria is to be TRUE.
6. Enter a custom view name.
7. Enter a description.
8. Check the **Customize Columns to be Displayed** option to select fields that are to be displayed in this view.
9. Use the Share Custom View option to enable this view for all users or specific users. Unchecking this option will enable this view only to the user who creates the view.
10. Use the Accessibility option to select projects that can use this custom view.
11. Click **Save**.

Task Details

1. Click on a task to view its details. Users can edit the default and custom fields here.
2. Scroll the task details page to add additional information to the task.

- **Comments:** Add comments and keep the conversation going
- **Subtasks:** View and add subtasks
- **Log Hours:** Add time logs
- **Documents:** View and attach documents
- **Forums:** Associate forum posts
- **Dependency:** View and set dependency between tasks
- **Status Timeline:** View status timeline of the task
- **Issues:** Associate issues to the task
- **Activity Stream:** Track all the activities of the task

- **Extensions:** View extensions installed in your portal.

More Reads

[Back to help]
[Overview - Issues]
[Overview - Timesheets]
[Overview - Milestones]