



Portal Home

The Home displays the most sought-after stats across your projects in the form of widgets. You can view a comprehensive list of the status of all the work across all the projects in your portal.

Personal

Click the **Home** tab in the left navigation panel of your portal to view the status of your work across projects in terms of [tasks](#), [issues](#), [phases](#), [events](#), etc. The following is the complete list of widgets that are present in the Home of your portal.

- My Tasks - Tasks you own across projects. Click View More to view all your tasks. You can also filter your tasks based on task custom views that you have created across projects.
- My Issues - Issues you need to resolve across projects.
- My Overdue Work Items - Work items across projects past the due date.
- My Phases - An overview of your phases across projects.
- My Work Items Due Today - Work items scheduled for the current day across projects.
- My Timesheet - Graphical representation of the time log entries made in the past 7 days.
- My Events - Events scheduled for the current week.
- All Tasks - Tasks that are overdue or due today.
- My Approvals - Leave records that are pending approval (requires [Zoho People integration](#)).

1. The Today's Work Items widget and the Overdue Work Items widget clearly display the list of work items that are in the pipeline and that have gone past the due date respectively. By default, these widgets display the data for both the tasks and issues.
2. You can choose to view only the tasks or only the issues by selecting the specific option from the drop-down.
3. You can drag a widget and swap its position with another. This repositioning will help you have the widgets that you need the most always on top.



Use cases

Construction: Engineers can view their own work items right from the *Home - Personal* view to get a quick overview of daily work items.

Marketing/ Sales: Marketers can view their tasks that are due for the day or overdue, the issues assigned to them, all tasks and issues that are assigned to them, and so on right from this *Personal Home* page.

HR: Recruiters can check their tasks for the day, overdue tasks, and more right from this page. This makes it easier for them to start their day.

Home - Detailed View

To get a detailed view of the My Tasks, My Phases, My Issues, My Events, and My Timesheet widgets, click the View More button in the upper right corner of the respective widgets. Hover over the widget name in the detailed view and navigate to the other widgets from the detailed view itself.

Enable Widgets

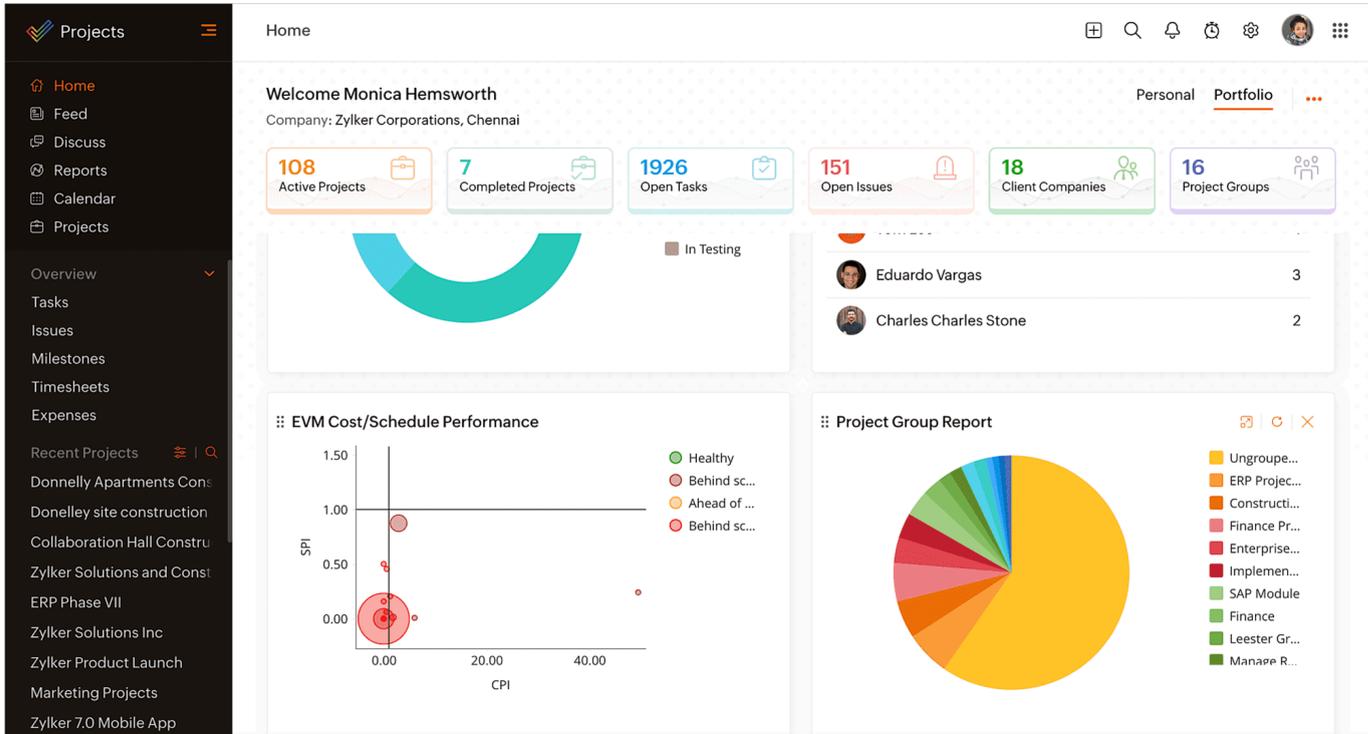
1. Users can enable the most used widgets and disable the rest.
2. Click on **•••** in the upper right corner.
3. Toggle on the widgets that you need.

The screenshot displays the Zylker Home dashboard for Monica Hemsworth. The dashboard includes a navigation sidebar on the left with options like Home, Feed, Discuss, Reports, Calendar, and Projects. The main content area shows a 'Welcome' message and several summary cards: 198 Open Tasks, 24 Closed Tasks, 13 Open Issues, 1 Closed Issues, and 34 Open Milestones. Below these are several widget sections, including 'Tasks for My Team members', 'My Overdue Work Items', 'My Work Items Due Today', and 'Issues for my team members'. A 'Widgets' menu is open in the top right corner, listing various widgets with toggle switches to enable or disable them. The 'Save' and 'Cancel' buttons are visible at the bottom of the menu.

4. Click **Save**. The widgets that are enabled will be displayed.

Portfolio

The portfolio dashboard gives a summary across all projects in the portal. A counter displays statistics related to your projects, tasks, issues, clients, and project groups. The project timeline Gantt provides a visual indicator of project schedules and where it stands.



Users can customize the dashboard by selecting widgets that they would like to see.

1. Click **⋮** in the upper-right corner and toggle the widgets.
2. Click **Save** to update your selection.
3. Reorder a widget by hovering over it and clicking and dragging the reorder icon (**☰**). Release the mouse pointer once the widget is in the desired location.



Use cases

Software/ IT: When multiple features are being developed, it can be tedious to switch between each and every project to check the summary of the projects. A software administrator can check the project summary from within this *Home Portfolio* view.

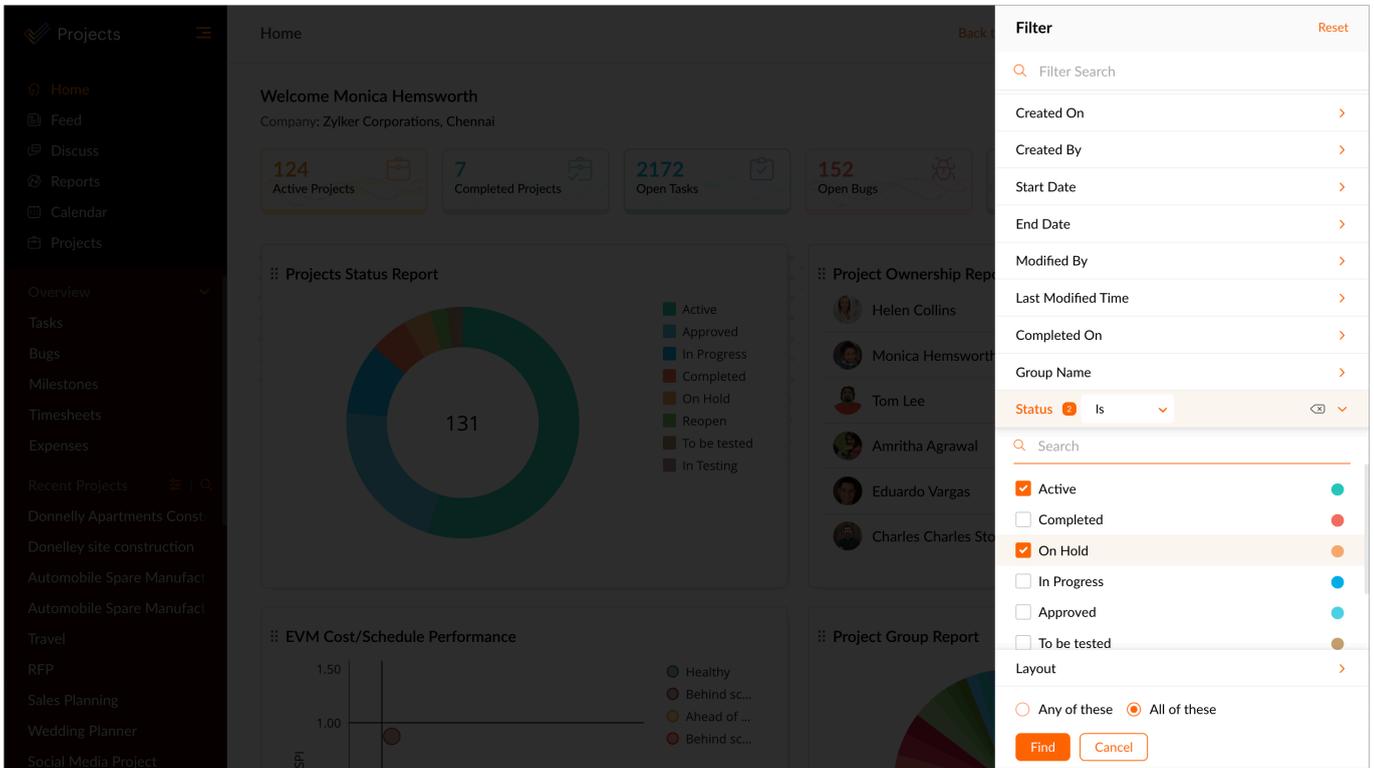
Construction: Construction company owner can find the ongoing projects summary right from within the *Home Portfolio* view.

Sales: Multiple sales projects can be undertaken by the organization. The organization owner can have a check on the summary of all the sales projects from this view.

Conditional Reports

The portfolio dashboard can further be drilled down using conditions. This will ensure the reports are optimized to individual or specific business needs.

1. Click  in the upper-right corner.
2. Select conditions to apply.



The screenshot shows the Zoho Projects dashboard for user Monica Hemsworth. The dashboard includes a sidebar with navigation options like Home, Feed, Discuss, Reports, Calendar, and Projects. The main content area displays a 'Projects Status Report' with a donut chart showing 131 total projects, categorized by status: Active (green), Approved (blue), In Progress (orange), Completed (red), On Hold (purple), Reopen (yellow), To be tested (grey), and In Testing (brown). Below this is an 'EVM Cost/Schedule Performance' chart. A 'Filter' overlay is open on the right side, allowing users to search and select conditions. The 'Status' filter is currently set to 'Is' and 'On Hold' is selected. Other filters include 'Created On', 'Created By', 'Start Date', 'End Date', 'Modified By', 'Last Modified Time', 'Completed On', 'Group Name', and 'Layout'. The 'Find' and 'Cancel' buttons are visible at the bottom of the filter overlay.

3. Click **Find**.

4. View reports based on the conditions selected.

The screenshot displays the Zoho Projects dashboard for user Monica Hemsworth. The interface includes a left-hand navigation menu with options like Home, Feed, Discuss, Reports, Calendar, and Projects. The main content area features a 'Welcome Monica Hemsworth' header, a company name 'Zylker Corporations, Chennai', and a 'Portfolio' tab. Below this, there are filter buttons for 'Active', 'On Hold', and 'In Progress', along with a 'Clear filter' button. A summary row shows key metrics: 90 Active Projects, 0 Completed Projects, 1620 Open Tasks, 149 Open Bugs, 16 Client Companies, and 16 Project Groups. The dashboard is divided into four report sections: 1. 'Projects Status Report' with a donut chart showing 90 total projects, categorized by Active (teal), In Progress (blue), and On Hold (orange). 2. 'Project Ownership Report' listing team members and their project counts: Helen Collins (57), Monica Hemsworth (19), Tom Lee (4), Amritha Agrawal (2), Eduardo Vargas (2), and Aravind Rajkumar (1). 3. 'EVM Cost/Schedule Performance' with a bar chart and a legend for 'Healthy', 'Behind sc...', and 'Ahead of ...'. 4. 'Project Group Report' with a pie chart and a legend for 'Ungroupe...', 'ERP Projects', and 'Finance Pr...'. The top right corner contains utility icons for 'Back to old version', search, notifications, and user profile.

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