



How to create a project?

Projects can be created newly or created from existing project templates. You can also create groups to classify the projects and manage the privileges of the other project users by making the projects private or public.

[Click to learn more about access privileges for creating projects.](#)

Create a Project from Scratch

1. Navigate to **Projects** tab in the left navigation panel.
2. Click **New Project** button in the upper right corner.
3. Enter a *Project Title*.
4. If desired, select a *Template* and an *Owner*, enter *Start* and *End Dates*, and create a *Project Overview*.
5. Set the *Group*, *Budget*, and other criteria for your project.
 - *Default Billing Status* can be changed when creating a project. It will override the selection in *Portal Settings*.
6. Select a *Billing Method* (**note that this option only appears when Zoho BugTracker is integrated with Zoho Invoice or Zoho Books** , and it is not available in the free plan).
 - *Based on Staff Hours* - Users are assigned different rates, and project billing is based on the user rates of the team members working on the project. You can set user rates in the *Add User* page.
 - *Based on Project Hours* - All users are assigned a standard rate, and project billing is based on the hours logged for the project as a whole.
7. Customize the tabs for your project as necessary. You can control the visibility of the modules to others in the project with this option.
8. Click **Add**.



- All projects in the portal will be associated to the standard layout by default. To access the layout editor and make changes to the custom fields, click the **Standard Layout** link present at the top of the form.
- The changes made to the project custom fields in the standard layout will reflect in all the projects associated with the layout.
- Bugs will have an auto-generated unique ID with a prefix. [Learn more](#) on how to edit a project and update the *Bug Prefix*.

Create a Project using a Project Template

You can create a new project afresh or use an existing [project template](#) to create the project.

1. Navigate to Projects tab in the left navigation panel.
2. Click **New Project** in the upper right corner.
3. Give a *Project Name* (mandatory).
4. *Choose a Template* from the list of project templates that are displayed in the drop-down.
 - When you *Choose a Template*, all the phases, and other information from the chosen project template will be copied to the newly created project.
 - The start time of the project modules (phases) will be shifted based on the *Project Start Date* of the new project.
5. Select an *Owner*, enter *Start* and *End Dates*, and create a *Project Overview*.
6. Select a *Billing Method*, set the *Group*, *Budget* and fill in other details.
7. Click **Add**.



- When you create a project from an existing project template, the *Project Start Date* option is enabled.
- Say, in a project template X, Phase A has a *Duration* of 5 days and it *Starts After* 2 days.
 - Now, when you choose this template X and set the new *Project Start Date* to Jan 15th 2016, Phase A's *Start Date* will be shifted to Jan 17th 2016 and the *End Date* will now be Jan 22nd 2016.
 - The newly selected *Project Start Date* will automatically shift all your phases, forums, and documents in the selected project template.

Create a Strict Project

Strict projects have a fixed schedule. It is preferable to plan all the project activities within the schedule. Projects following the strict methodology are more successful because their project modules cannot extend beyond the scheduled project dates.

- All strict projects must always have a scheduled project start and end date.
- If you *Make this a strict project*, the project modules like Phases etc., must have their start and end dates within the scheduled project *Start Date* and *End Date*.

And you cannot start or extend the start and end dates for any project modules beyond the scheduled project dates. Such as, **Phases will be scheduled within the projects date range, and Bugs will be scheduled within the Phases date range and so on.**

- If you do not make a project strict, the project modules can be scheduled without any date restrictions. i.e, It is not mandatory to have a scheduled *Start Date* and *End Date*, if it is not a strict project.
- The project cannot start and end on the same day.

Strict projects are distinct from other public and private projects in the **Projects** list view as they are indicated with the 🕒 icon. You cannot select dates beyond the project's schedule in any of the date pickers, for strict projects. An error message is displayed whenever you do not select a valid date range for the project modules.

More information about strict projects

- Timers are not automatically stopped even after the project finish date
- Meeting and log hour duration are not restricted by the scheduled project dates
- SLA in bugs do not follow the project finish date schedule
- You can add expenses for dates even after the project finish date
- While importing bug, the dates may exceed the scheduled project dates
- Bugs associated to phases, will automatically consider only the *Release Phase* dates

Create Public and Private Projects

You can choose to make your project go public or private. Private projects can be accessed only by the member project users, whereas public projects can be viewed and followed by all the portal users. In public projects, users will have only read access but they can view and follow projects and add comments. However, if you are the Admin, you will have all the access privileges even for public projects.

1. Click **Projects** in the left navigation panel.
2. Click **New Project** button.
3. Fill the project details and scroll down in the *New Project* form.
4. Select either *Private* or *Public* as per project requirement.

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New Project

Standard Layout ↕

Currency ⓘ

USD- US Dollar

Budget Type

None

Billing Method

Based on Staff Hours

Bill customers based on their user rates.

Customize Tabs For This Project

Dashboard <input checked="" type="checkbox"/>	Bugs <input checked="" type="checkbox"/>	Milestones <input checked="" type="checkbox"/>	Documents <input checked="" type="checkbox"/>
Timesheet <input checked="" type="checkbox"/>	Finance <input checked="" type="checkbox"/>	Forums <input checked="" type="checkbox"/>	Pages <input checked="" type="checkbox"/>
Users <input checked="" type="checkbox"/>	Reports <input checked="" type="checkbox"/>	TestApp3 <input type="checkbox"/>	Task List <input type="checkbox"/>
Expense <input checked="" type="checkbox"/>	Tasklistv7 <input type="checkbox"/>	Google Drive <input type="checkbox"/>	Dropbox <input type="checkbox"/>
Google Drive <input type="checkbox"/>	Wiki <input type="checkbox"/>	Material Reques... <input type="checkbox"/>	SharePoint <input type="checkbox"/>
Zoho Analytics ... <input type="checkbox"/>	Task List <input type="checkbox"/>		

Project Access

Private
Only project users can view and access this project.

Public
Portal users can only view, follow, and comment whereas, project users will have complete access.

Add
Cancel

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