

# Review of Zoho Business as a Web Office and Team Portal

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## Contents

Introduction .....	1
Creating the Organization .....	1
User Management .....	3
Inviting Users .....	4
Importing Users.....	5
Group Management.....	6
Groups.....	7
Tasks.....	8
Calendar .....	10
Links .....	14
Group Discussions.....	16
Document Management.....	16
Creating a Document .....	17
Document Sharing.....	19
Collaborative Editing.....	22
Document Versioning .....	23
Issues.....	23

## Introduction

Zoho Business is a web office and team collaboration tool that is aimed at small and medium sized organizations. It current is in beta, which does show, but it still has a wide variety of functionality available. We are are just going to focus on document management, group support, scheduling, and knowledge management.

One of the nice features of the site is that you can use your own domain and email addresses. Zoho does offer an email client, but it does not offer email service through Zoho Business.

## Creating the Organization

When you sign in for the first time to Zoho Business you need to set up your organization.

**Manage** | Settings | Feedback | Forum | Logout jwesterl

Document Sheet Presentation Event Task Note Link

**Apps** <<

- Mail
- Desktop
- Documents
- Calendar
- Tasks
- Notes
- Contacts
- Links
- More ....

+ Add Apps

Groups

Chat

## Create your Organization

Zoho Business provides various tools, features and functionalities that are specifically designed to address the needs of an organization. Go ahead and create your organization

You can:

- Add and manage users
- Create groups with your organization members
- Add, configure and manage your domains
- Manage applications and mail accounts, etc.

Provide your organization Name

Create Organization

We are going to setup the OWx2 Organization for this demonstration.

**Manage** | Settings | Feedback | Forum | Logout jwesterl

Document Sheet Presentation Event Task Note Link

**Apps** <<

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## Create your Organization

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You can:

- Add and manage users
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- Add, configure and manage your domains
- Manage applications and mail accounts, etc.

Provide your organization Name

Create Organization


Once the organization is created you can do a number of things.

**OWx2 Online Workspace Whizzes** [Home](#) | [Forum](#) | [Logout Josh](#)

**Control Panel**

- Organization
- Domains
- Location
- User(s)
- Groups
- Reset Password

### Organization

**Organization Logo**

**Upload Logo**

**Super Administrator**  
Username: Josh [\(Change\)](#)  
Email ID : josh.westerlund@gmail.com

**Organization details**

Organization Name	OWx2 <a href="#">(Edit)</a>
Portal URL	---- <a href="#">(Edit)</a>
No. of User(s)	3 <a href="#">(View)</a>
No. of Groups	2 <a href="#">(View)</a>
Domains	--- <a href="#">(View)</a>
Location	US, <a href="#">(View)</a>

**Delete Organization**  
You can delete the organization, by clicking the 'Delete Organization' button, then the data related to organization, user management, domains, organization groups will be deleted.

You can customize Zoho Business with your organization's logo as well as add your own domain too.

## User Management

**OWx2 Online Workspace Whizzes** [Home](#) | [Forum](#) | [Logout Josh](#)

**Control Panel**

- Organization
- Domains
- Location
- User(s)
- Groups
- Reset Password

### User(s)

Change Role  
Change Location

[Users List](#) | [Invitations List](#)
[Help?](#)

Users List:

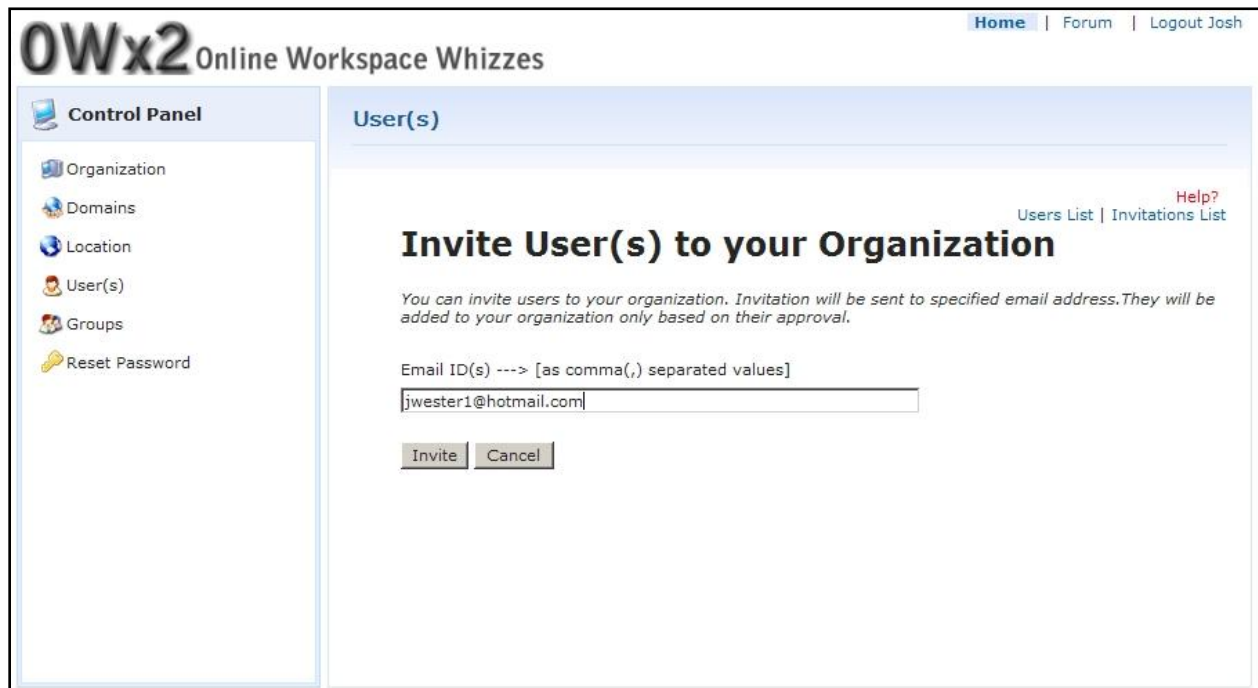
<input type="checkbox"/>	User Name	Role	EMail	Location	Created On	Status	Action
<input type="checkbox"/>	joshwesterlund	User	joshwesterlund@yahoo.com	-----	Sun May 18 10:33:12 PDT 2008		
<input type="checkbox"/>	jwester1	User	josh@sonicsuperstar.com	-----	Sat May 17 14:29:38 PDT 2008		
<input type="checkbox"/>	Josh Westerlund	Admin	josh.westerlund@gmail.com	-----	Thu Apr 17 18:11:24 PDT 2008		

For Zoho Business you do not create user accounts. You send out invitations to users to join your organization. This has its pros and cons. A drawback to this is that when a user gets an invitation they will need to create a new Zoho account, which is easy pretty, or they can use an existing Google or Yahoo login. This could be a support issue for some organizations. If a user forgets their username or

password they will need to use Zoho support to recover this. Organizations cannot help users retrieve this information. This also leads to users being able to pick whatever username they would like. Later on when we get into documentation management and other things this username is going to show up more and if someone picked a cryptic username others might find it hard to figure out what user that is. Although in small and medium sized companies this will probably be less of an issue.

## Inviting Users

Here is the screen where you can invite a user. You simply type in the person's email address and an invitation will be sent to the user.



The screenshot shows the OWx2 Online Workspace Whizzes interface. The top navigation bar includes links for Home, Forum, and Logout Josh. A left sidebar titled 'Control Panel' contains links for Organization, Domains, Location, User(s), Groups, and Reset Password. The main content area is titled 'User(s)' and features a section for 'Invite User(s) to your Organization'. This section includes a descriptive paragraph, a text input field for 'Email ID(s)' with a placeholder '[as comma(,) separated values]' containing 'jwester1@hotmail.com', and 'Invite' and 'Cancel' buttons. Additional links for 'Users List', 'Invitations List', and 'Help?' are also present.

OWx2 Online Workspace Whizzes

Home | Forum | Logout Josh

**Control Panel**

- Organization
- Domains
- Location
- User(s)
- Groups
- Reset Password

**User(s)**

**Invite User(s) to your Organization**

[Users List](#) | [Invitations List](#) [Help?](#)

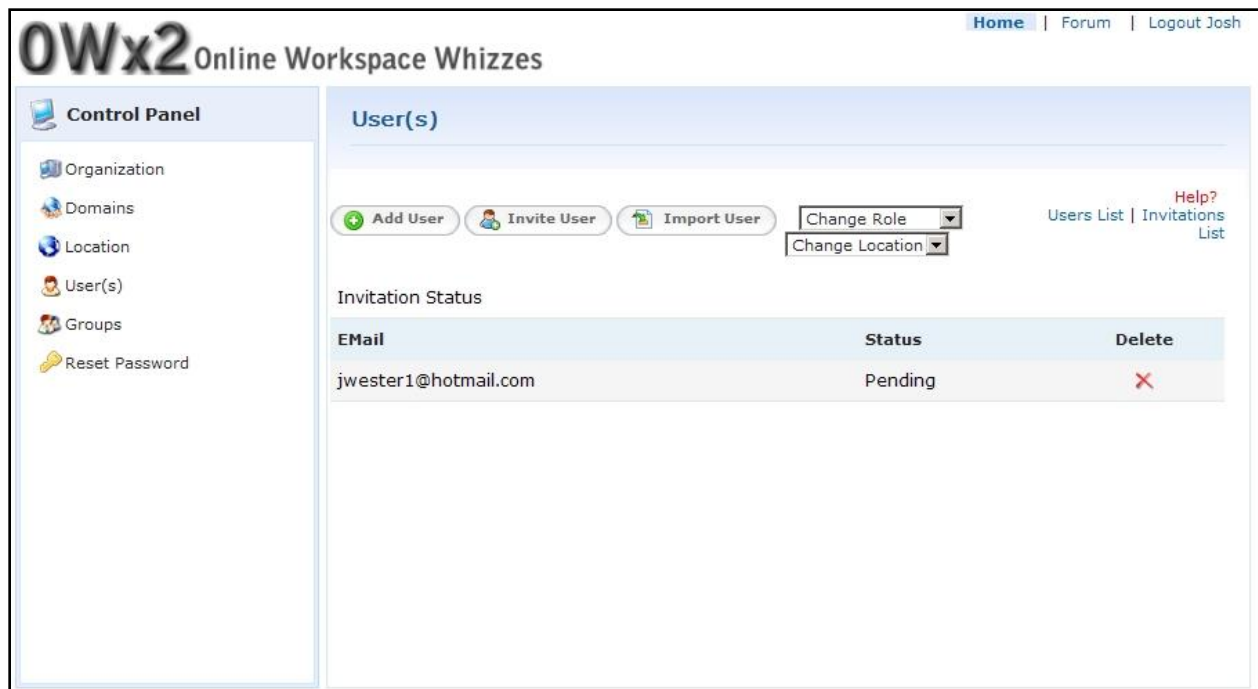
You can invite users to your organization. Invitation will be sent to specified email address. They will be added to your organization only based on their approval.

Email ID(s) ---> [as comma(,) separated values]

jwester1@hotmail.com

Invite Cancel

After sending out the invitation you can see the pending invitation. You can easily delete the invitation if you need to.



Here is what an invitation looks like. It is very simple for a user to accept an invitation. If a user does not already have a Zoho account it walks them through creating an account.



Even though you say that you want to use your Yahoo or Google account you still must create a Zoho account. If you don't then you will not be able to accept invitations. You will also need this password to modify your account. When you pick to use a google or Yahoo account you are just connecting it to a Zoho account. You will need a Zoho username and password. This was frustrating and took some time for me to troubleshoot why I could not accept the invitation.

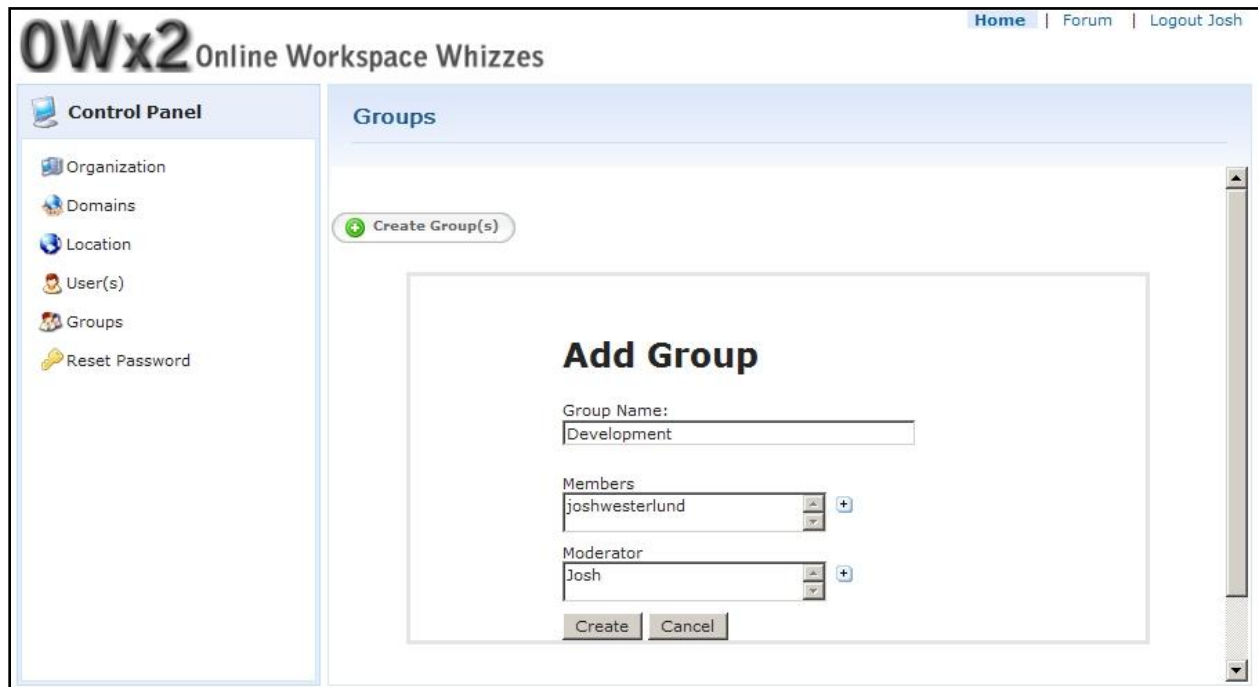
## Importing Users

If you have added your own domain to Zoho Business then you can also import users. This is great for small or medium organizations that have already setup a domain and users and just want to quickly add the users.

## Group Management

Once you have invited users you can start to create groups and assign users to the groups. Each group will then get an area where they can work together and share information. Only users in the group will be able to see the group.

Here is the screen showing how you would add a new group.



The screenshot shows the 'OWx2 Online Workspace Whizzes' interface. On the left is a 'Control Panel' sidebar with links to Organization, Domains, Location, User(s), Groups, and Reset Password. The main area is titled 'Groups' and contains a 'Create Group(s)' button. Below this is a form titled 'Add Group' with the following fields:

- Group Name:** A text input field containing 'Development'.
- Members:** A dropdown menu showing 'joshwesterlund' with a '+' button to add more members.
- Moderator:** A dropdown menu showing 'Josh' with a '+' button to add more moderators.
- Buttons:** 'Create' and 'Cancel' buttons at the bottom of the form.


The top right of the page has navigation links: Home, Forum, and Logout Josh.


Here is the group management area after the group has been created. You can edit and delete the groups from here as well.


# OWx2


## Online Workspace Whizzes

[Home](#) | [Forum](#) | [Logout Josh](#)

**Control Panel**


 Organization

 Domains

 Location

 User(s)




 Groups

 Reset Password

### Groups

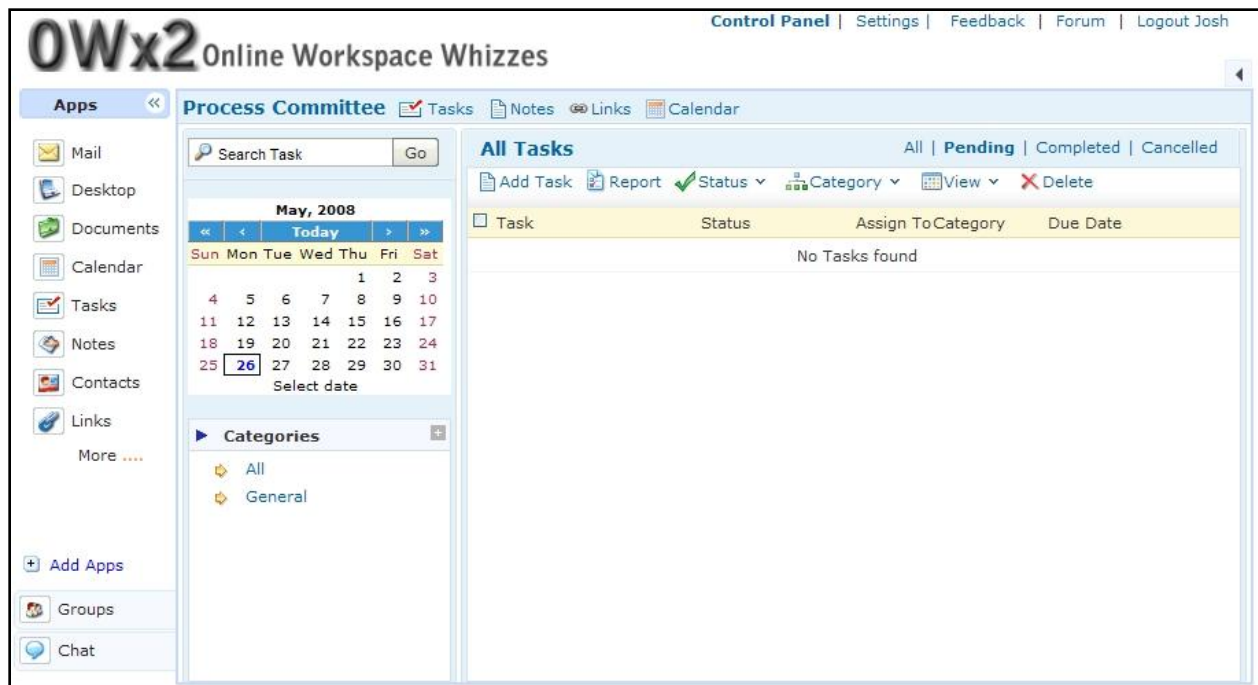
Group Development Added successfully.

Create Group(s)

Logo	Group Name:	Moderator	Actions
	Process Committee	Josh Westerlund,	Edit Delete
	Security Committee	Josh Westerlund,	Edit Delete
	Development	Josh Westerlund,	Edit Delete

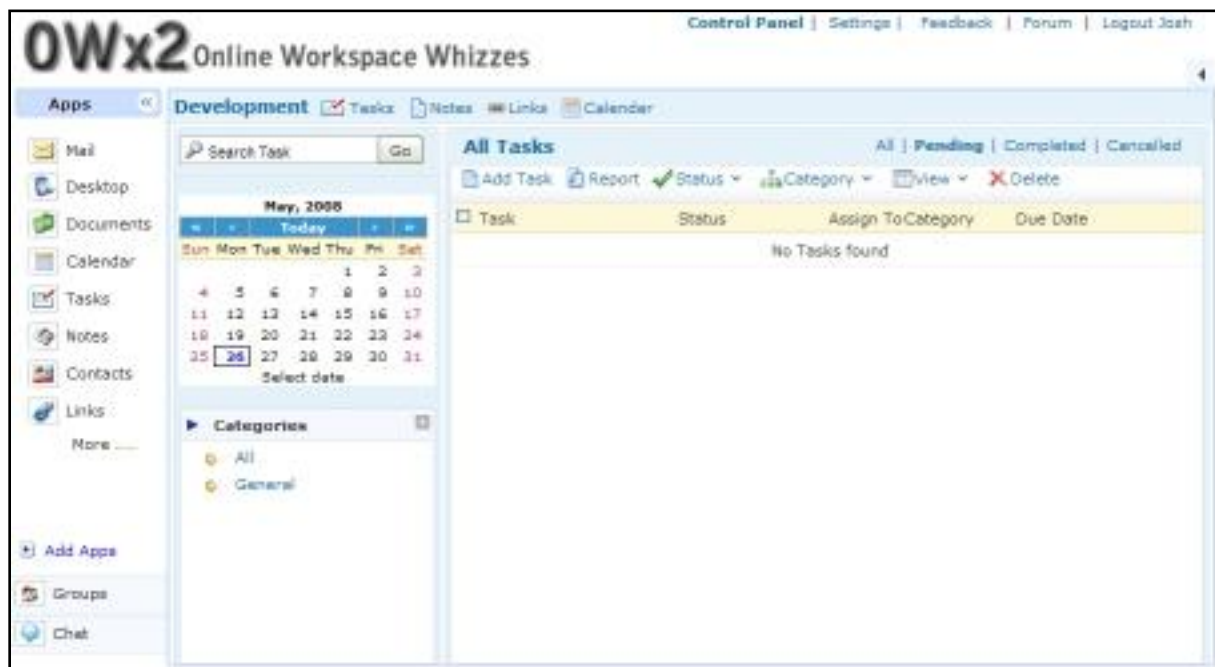
## Groups

Once you have created a group, users that belong to the group will see the group under the group's area on the left menu. Each group has tasks, notes, links, and a calendar. When you select the group it takes you to the group task area.



## Tasks

I create a task in the group and assigned it to myself. It has a very simple way to create tasks, but it is possible to go to an advanced view where you can enter in more details.



To add a group task simply select "Add Task". A new group task window will open.



Add Task

X

Title

Pull Defect Tracking Report

Start Date

05/27/2008

Assign To

Josh

+

☐ Send Mail

End date

05/28/2008

Status

Needs Action

▼

Priority

Medium

▼

Completion (%)

0

Category

General

Description

Pull the defect tracking report and distribute to the development group.

▲▼

☒ Send a reminder on

05/26/2008

4:00 pm

▼

☒ Mail

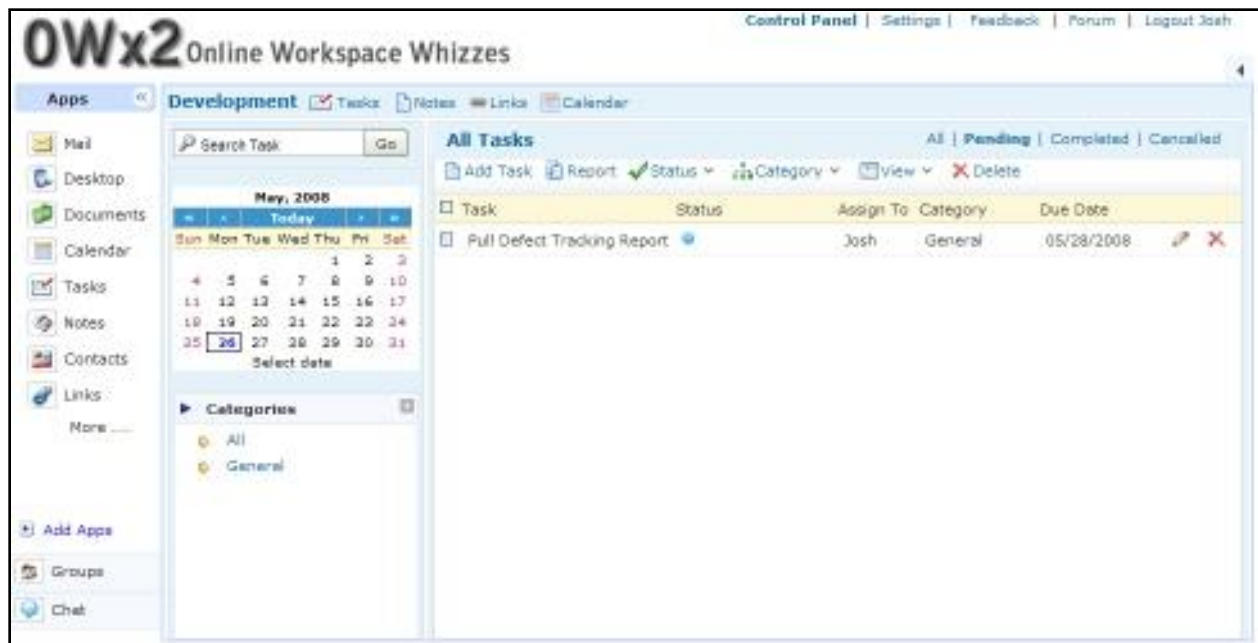
☒ Popup

Create

Cancel

When adding a group task you can enter in a great deal more information about the task like description, completion information, priority, and reminders.

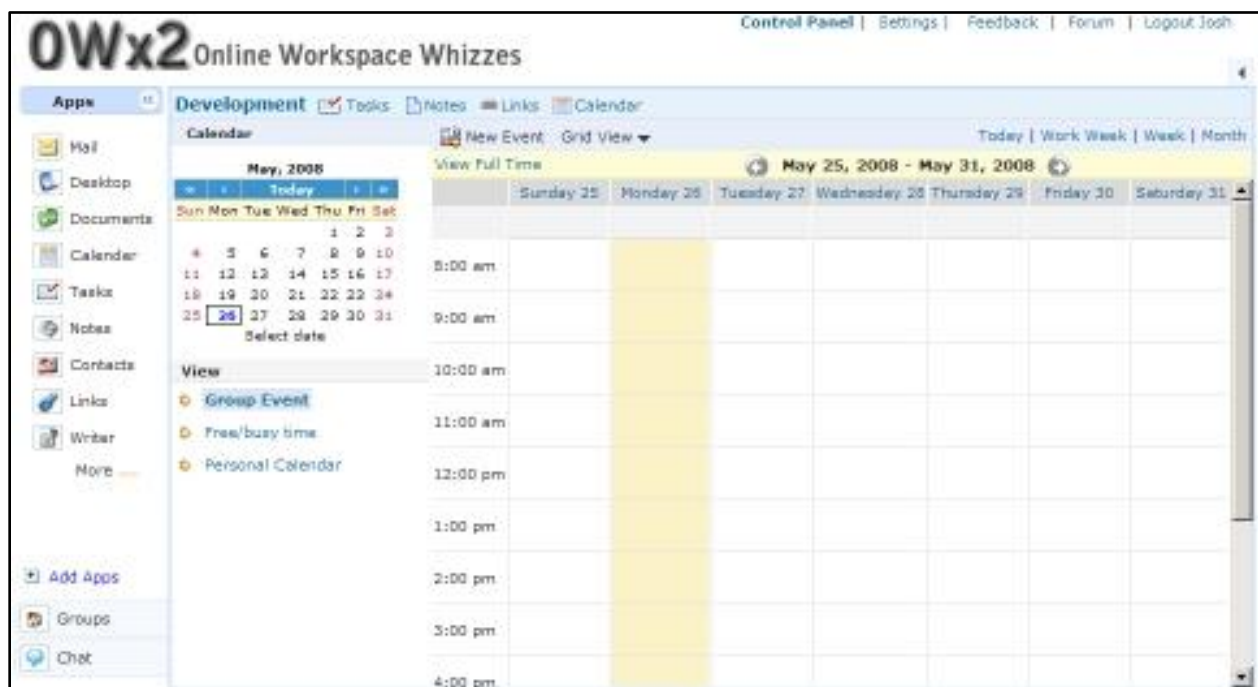
One draw back I quickly discovered is that tasks you create in a group are not visible to the user when they are in their personal task area. So user would have to visit the group areas to see what task are assigned to them. If a user is part of more than one group this could be troublesome for them to manage.



Users can also create task for themselves and others under their own personal task list. This works essential the same as creating group tasks. Now that we have reviewed how to create tasks lets look at how we can use the calendar feature.

## Calendar

The Zoho Business group calendar is straight forward. Here is what the group calendar looks like.



When looking at the calendar you select New Event. An event pop up window opens.

**New Group Event**

General | Advanced

Title:  ☒ Show this as busy time

Date:   -

Location:  Status:

Description:

---

Classification: ☒ Public ☐ Private

Reminder:  ☒ Mail ☒ Popup

Here is the event pop up window and the options that you can select. You will notice that there are no options to create a reoccurring group event. You can also invite other people from the group to the meeting. By default everyone in the group is invited.

**New Group Event**

General | **Advanced**

**Organised by,**

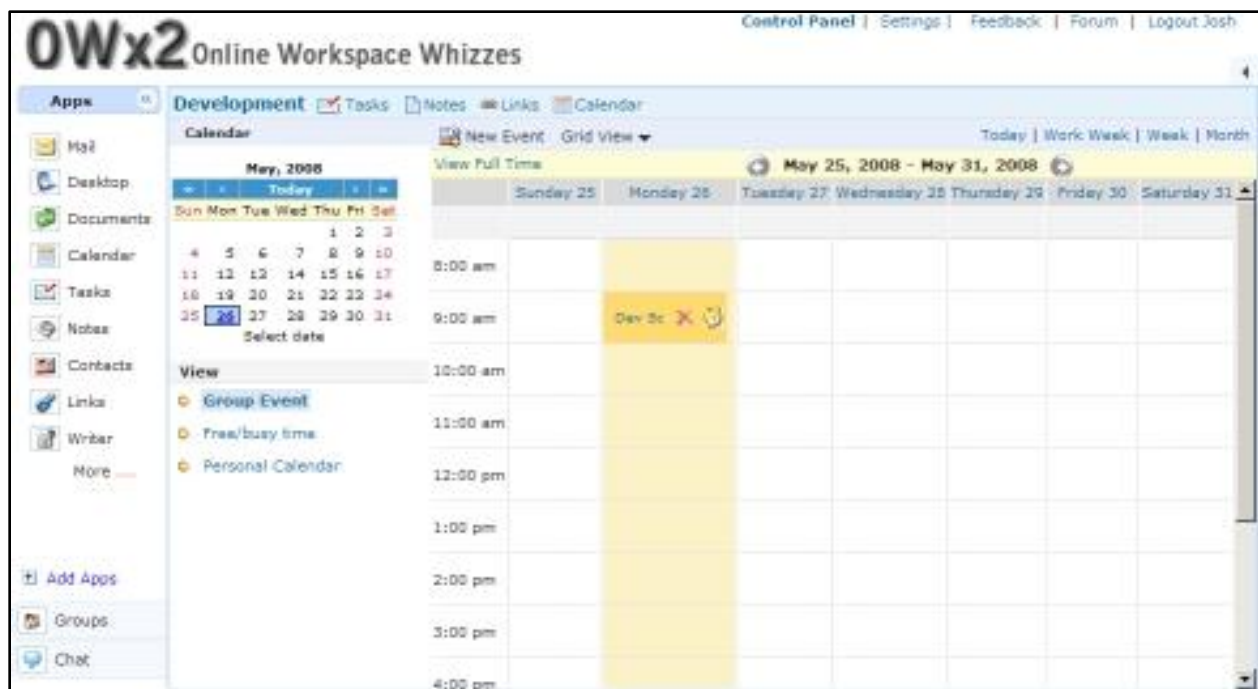
Invite Members

eg., John

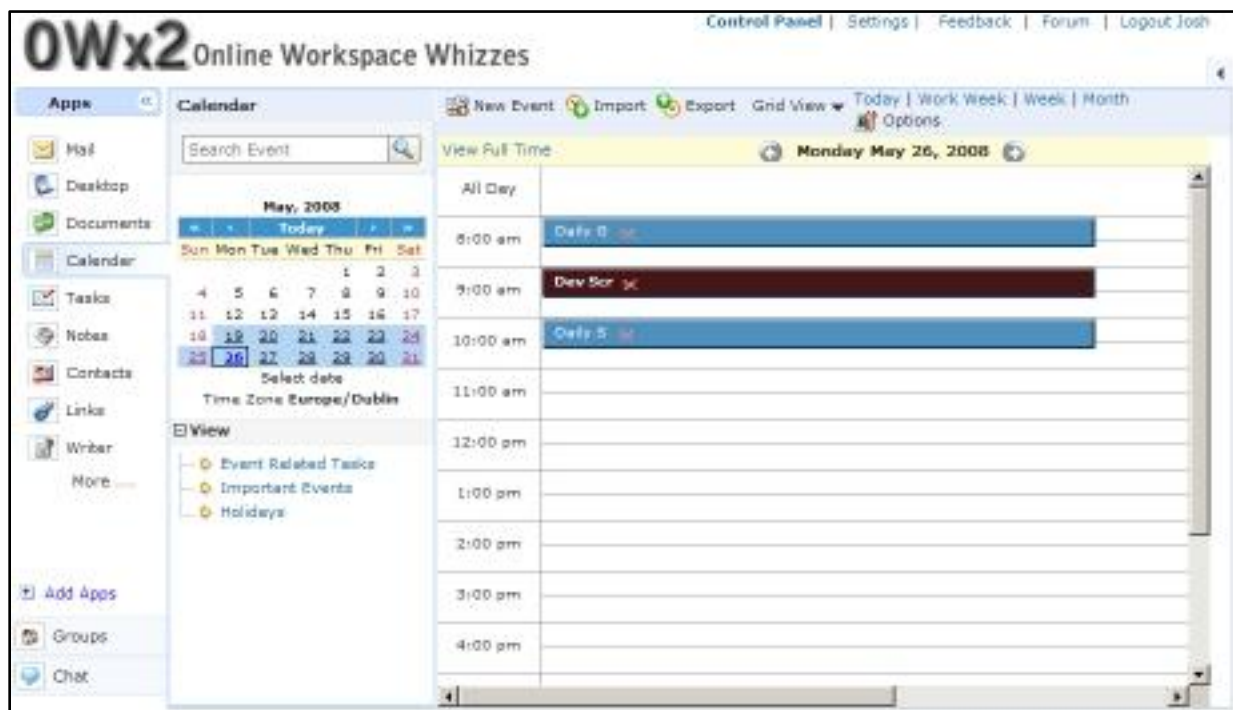
Note: Invited member has to be part of this Group.

After creating the group meeting and making sure that everyone in the group was selected the other group members were not invited. The event only showed up on the group page for me and not others in the group.

The group calendar with the event added to it.



Group events also show up on users personal calendars as well.



You can also create event on your personal calendar. This works a bit differently.

The image shows a 'New Event' dialog box with a blue title bar and a close button (X) in the top right corner. It has two tabs: 'General' (selected) and 'Advanced'. The 'General' tab contains the following fields and options:

- Title:** A text box containing 'Daily Group Status Meeting'.
- Date:** Two date and time pickers. The first is '05/19/2008' with a time dropdown set to '8:00 am'. The second is '05/19/2008' with a time dropdown set to '8:30 am', preceded by '..'.
- Options:** Two checkboxes: 'All Day Event' (unchecked) and 'Show this as busy time' (checked).
- Description:** A text box containing 'Meeting to review processes...' with a vertical scrollbar on the right.

The 'Advanced' tab, which is currently inactive, contains the following options:

- Repeat:** A dropdown menu set to 'Daily'. Below it are three radio button options: 'No end date' (selected), 'Until 05/19/2008', and 'for [ ] times'.
- Reminder:** A dropdown menu set to '15 Mins'. Below it are two checked checkboxes: 'Mail' and 'Popup'.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

When creating an event on your personal calendar you have repeat options to make the event reoccurring. You can also invite others to the event too.

The screenshot shows a 'New Event' dialog box with a blue title bar and a close button (X). It has two tabs: 'General' and 'Advanced', with 'Advanced' currently selected. The 'Organised by,' field is empty. Below it, the 'Invite Members' section has a text input field with 'eg., john' and an 'Add' button. The 'Invite Others' section has a text input field with 'eg., johndavid@gmail.com' and an 'Add' button. To the right of these is a list box containing 'joshwesterlund@yahoo.com'. A 'Delete' button is located at the bottom right of the list box. The bottom section of the dialog is yellow and contains several options: 'Classification' with radio buttons for 'Public' and 'Private' (selected), 'Create an associated task' (checkbox), 'Category' with a text input field and a 'Choose' button, 'Mark as Important' (checkbox), 'Location' with a text input field containing 'Conf 128', and 'Status' with a dropdown menu showing 'Confirmed'. At the very bottom are 'OK' and 'Cancel' buttons.

I could not get events to invite the other people where selected or show up on their calendars. In the description of the event it shows that the other people were invited, but the other individuals never receive an invitation, have it display on their calendar, or display on their desktop.

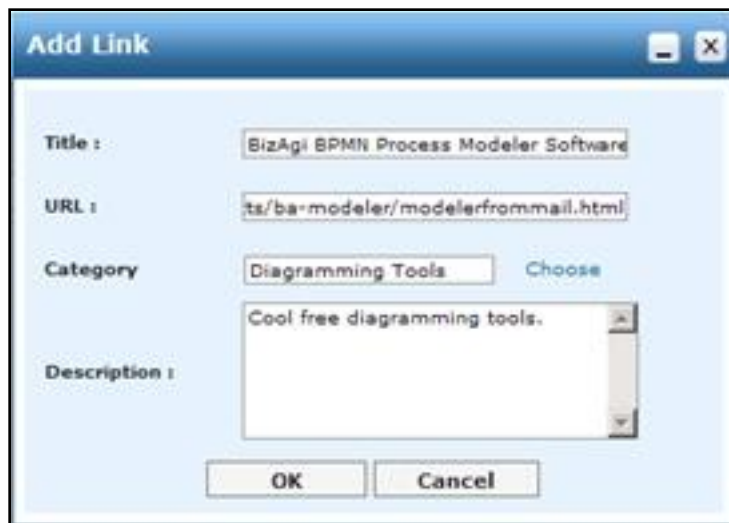
Also if you try to double book a person it does catch this, but it does not display an error. It simply does not save the event.

## Links

One of the features that did seem to work well was the link feature.

Creating links in the group area and in your personal area works the same. One disadvantage is that you can have a link in your personal links that you then share with a group.

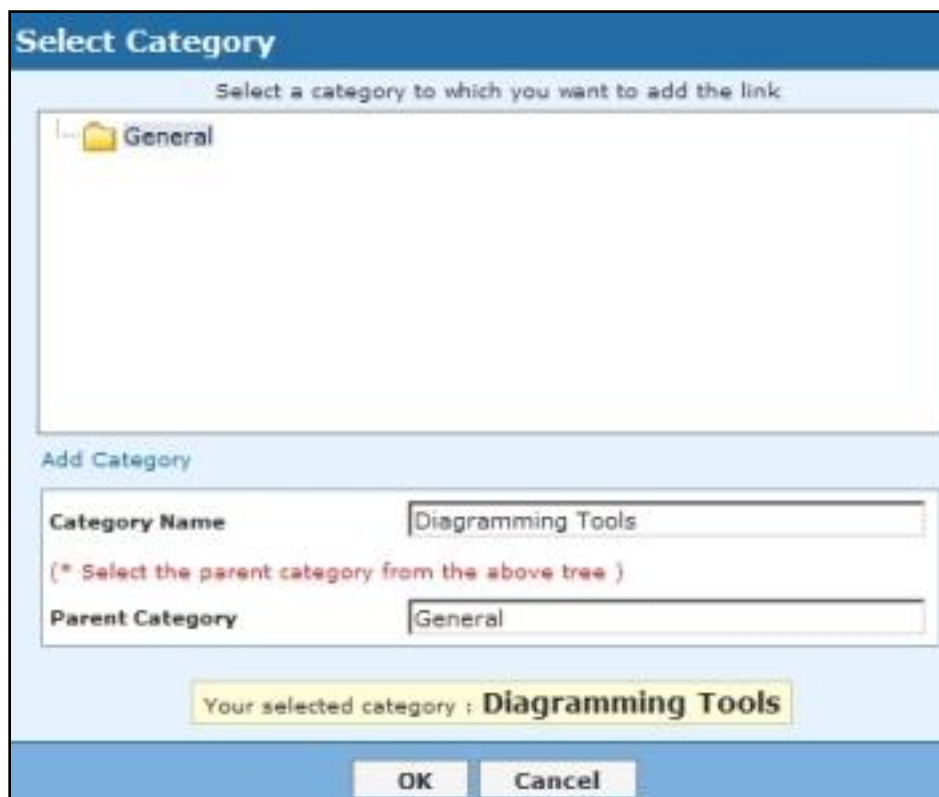
Here we are creating a new link and while saving the link we are creating a new category.



The 'Add Link' dialog box has a blue title bar with the text 'Add Link' and standard window controls. It contains four labeled input fields: 'Title' with the text 'BizAgi BPMN Process Modeler Software', 'URL' with 'ts/ba-modeler/modelerfrommail.html', 'Category' with a dropdown menu showing 'Diagramming Tools' and a 'Choose' button to its right, and 'Description' with a text area containing 'Cool free diagramming tools.'. At the bottom are 'OK' and 'Cancel' buttons.

When creating a new link you input the title, URL, Category, and a description.

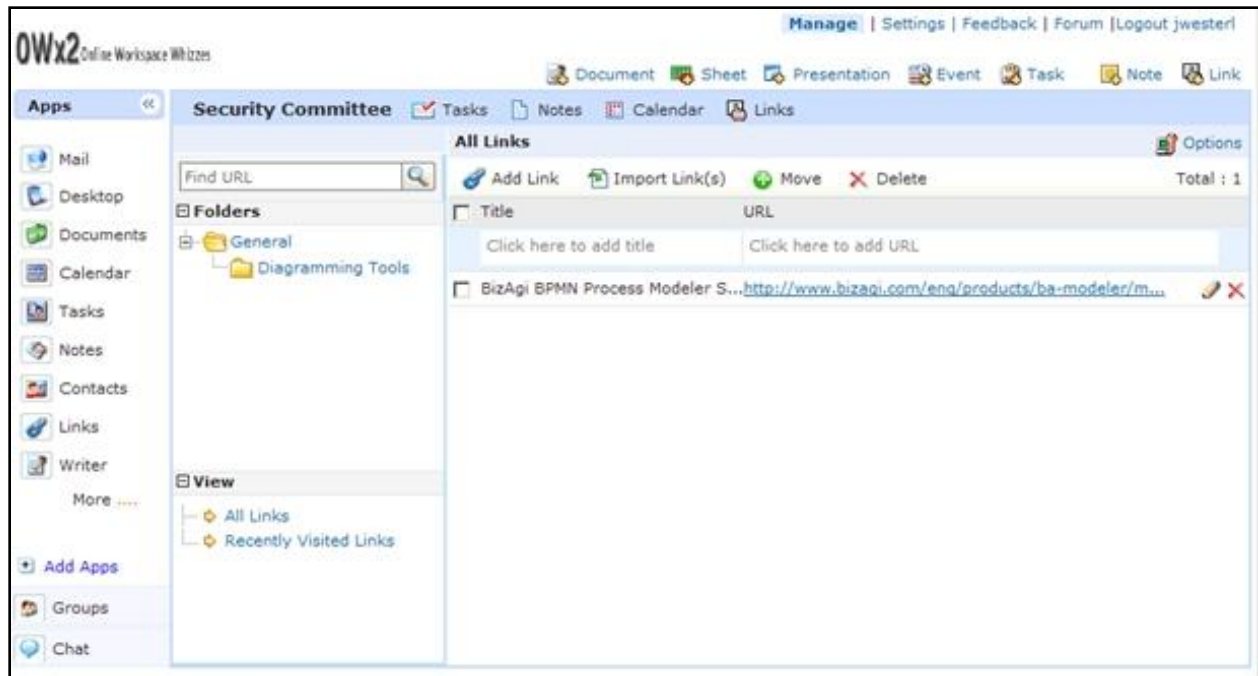
If you want to select a different category or create a new category you just click on the Choose link. Here is the window to select a category or create a new category.



The 'Select Category' dialog box has a blue title bar with the text 'Select Category'. Below the title bar is a subtitle 'Select a category to which you want to add the link'. The main area contains a tree view with a single folder icon and the label 'General'. Below this is a section titled 'Add Category' which contains two input fields: 'Category Name' with the text 'Diagramming Tools' and 'Parent Category' with the text 'General'. A red note below the first field reads '(\* Select the parent category from the above tree )'. At the bottom, a yellow box displays 'Your selected category : Diagramming Tools'. 'OK' and 'Cancel' buttons are at the very bottom.

In this example we are creating a new category called Diagramming Tools that is a child of General.





Here is the view of the links area after we have added a link. When you click on the link it opens it in a new window.

## Group Discussions

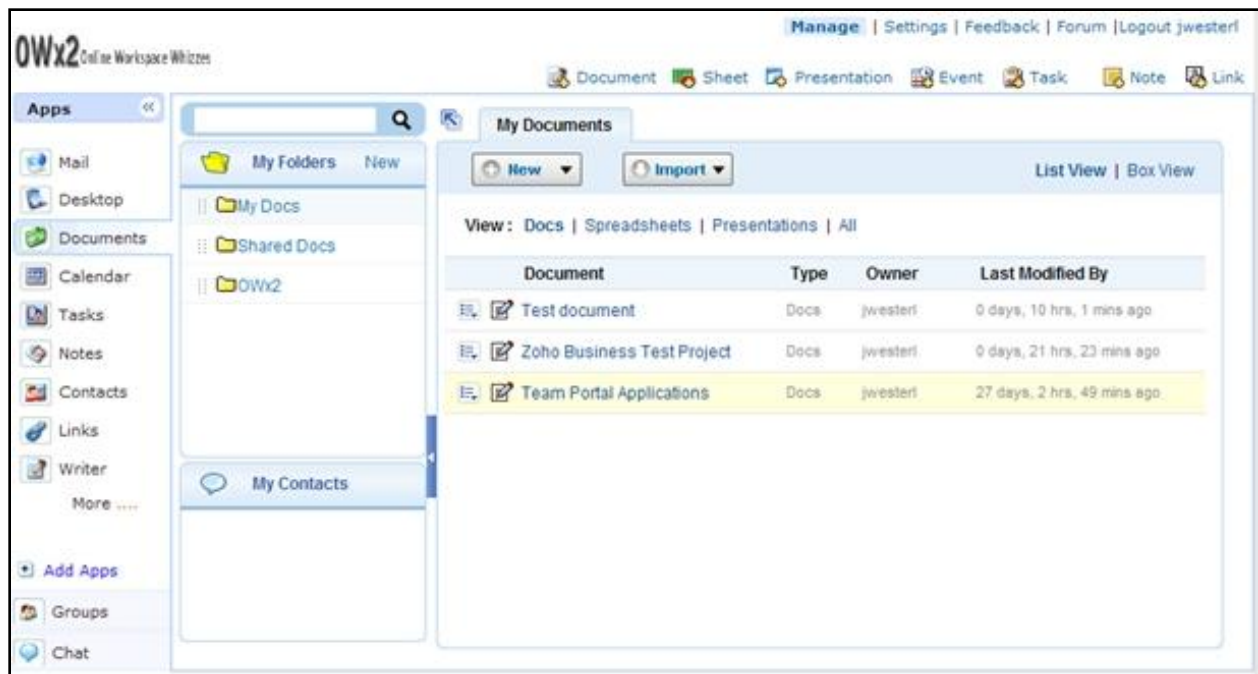
Zoho Business does not have a group discussion feature. A group could use the Zoho Wiki application to create a group discussion forum.

Zoho Business does have a chat feature but at the time of writing it was not functioning. The Zoho chat feature could be used, but then your discussions are not integrated with Zoho Business and could not be shared with others.

## Document Management

For groups you actually do not create documents in the group area. You first create the document in your own area and then share the document with the group. One of the first things I noticed is that documents that I created outside of the business area still show up. This could be problematic. If a user decides to use their personal Zoho account then any personal documents that they might have will show up when they are working in the Business area. Also this would seem to mean that the documents do not belong to the business and if a user leaves the business area they would take all of the documents with them. This would be unacceptable to an organization.

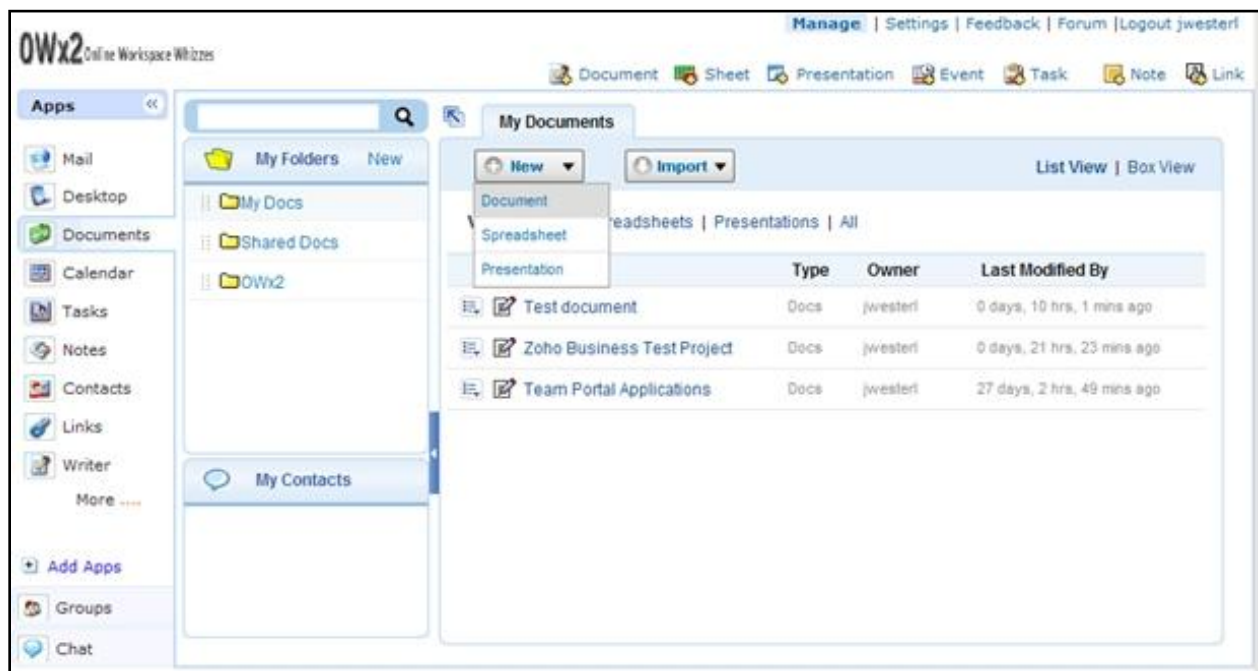




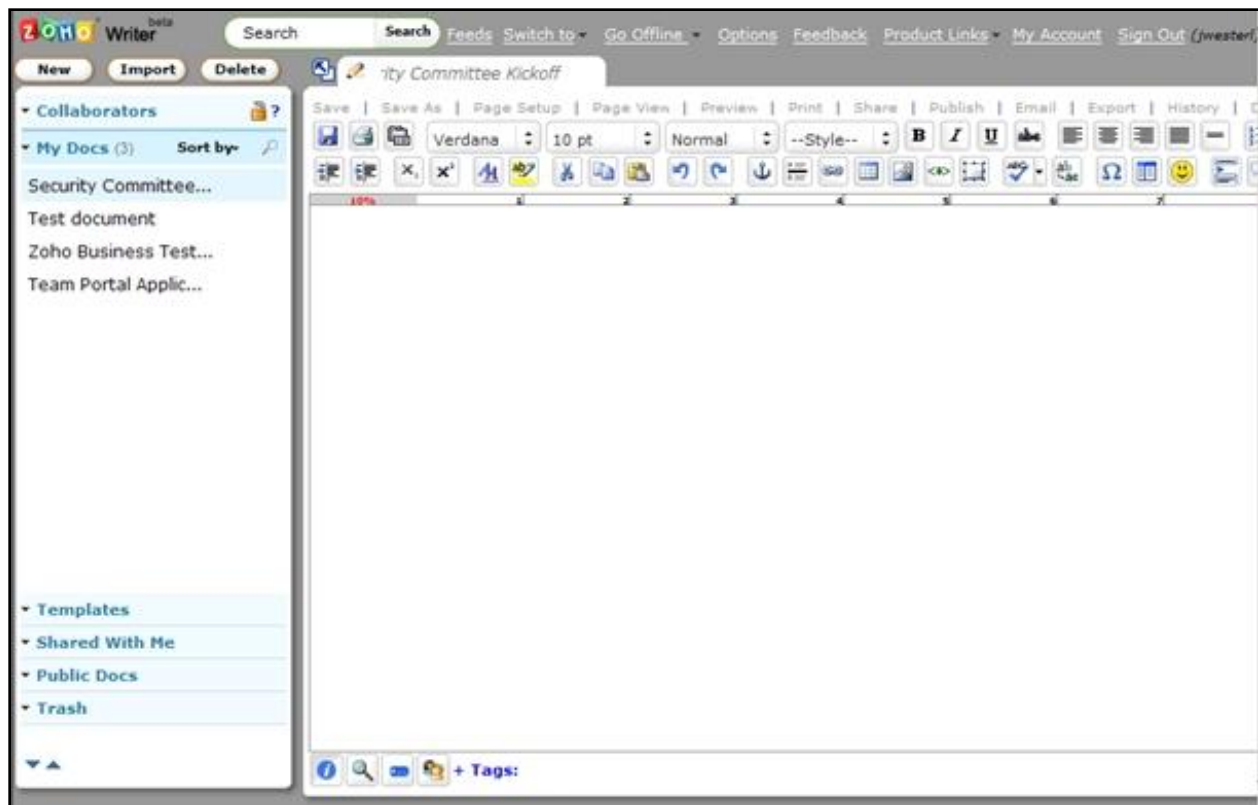
As you can see I can create folders to help me organization my documents. I can also import documents that I might have created in other editors.

### Creating a Document

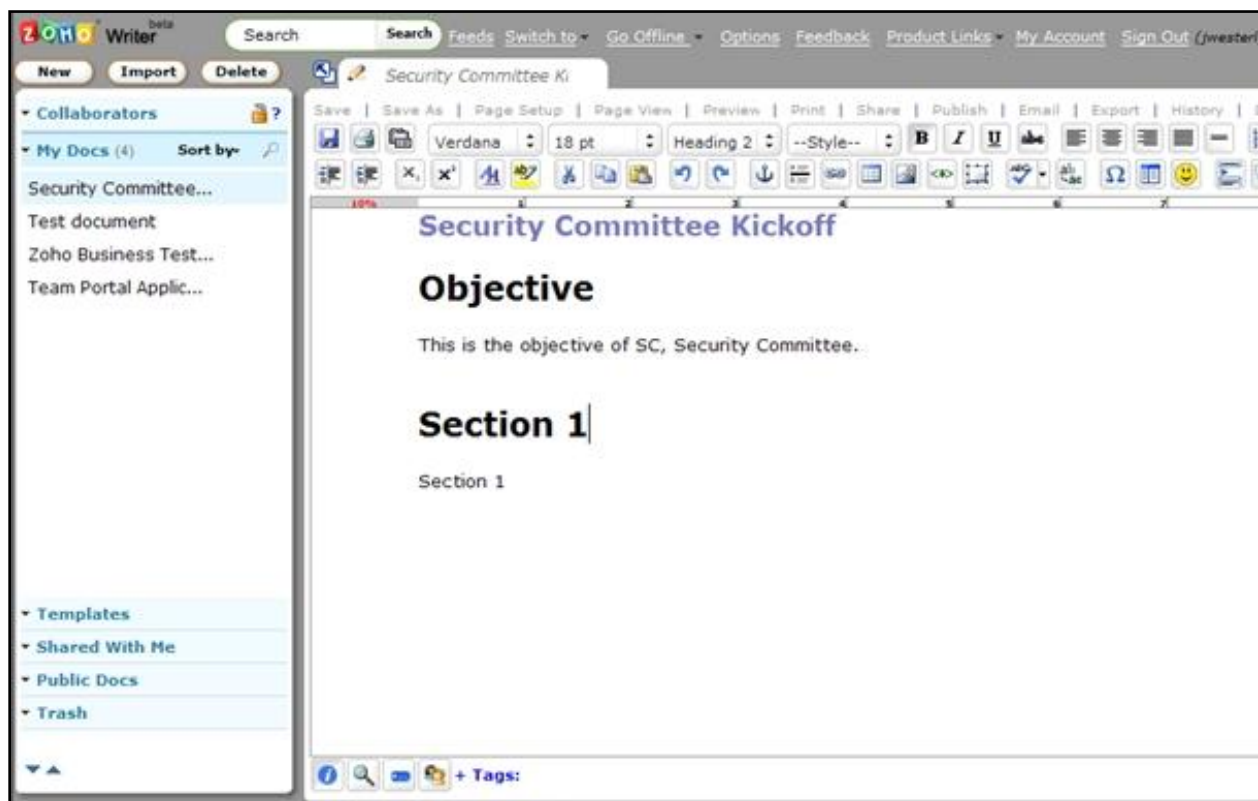
Lets create a new document for the Security Committee group.



When I select New Document it creates a new document in a new window which I found very nice.



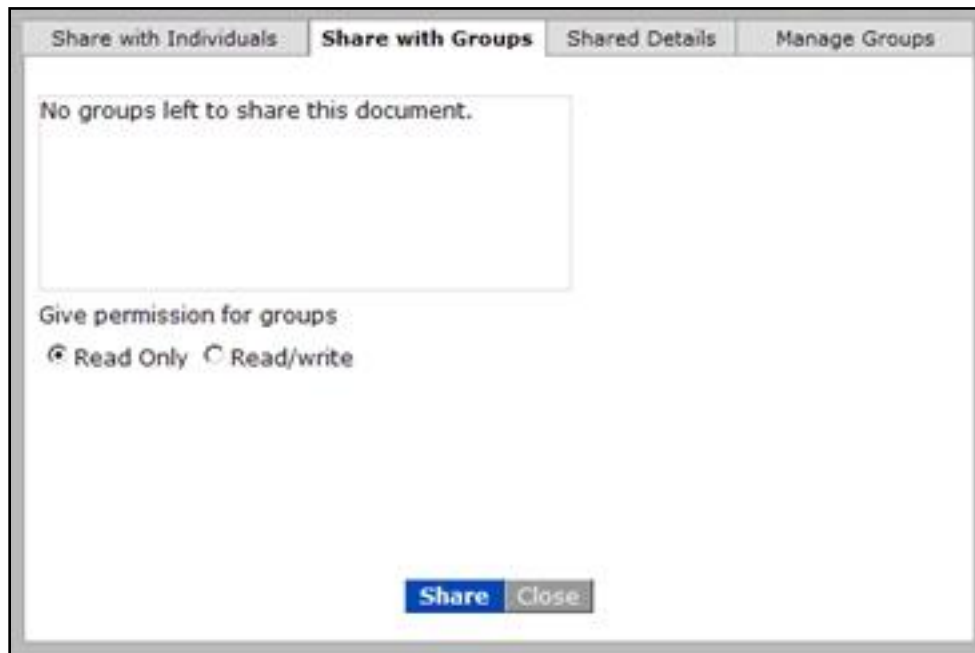
The first thing I did was give the document a name. Then add some content and saved the document.



As I was adding content I ran into formatting issues when trying to use the Style drop down. It would not stop styling the text. I had to switch to HTML source mode to fix the issue and then I only used the formatting options and it worked correctly and I did not have any more issues.

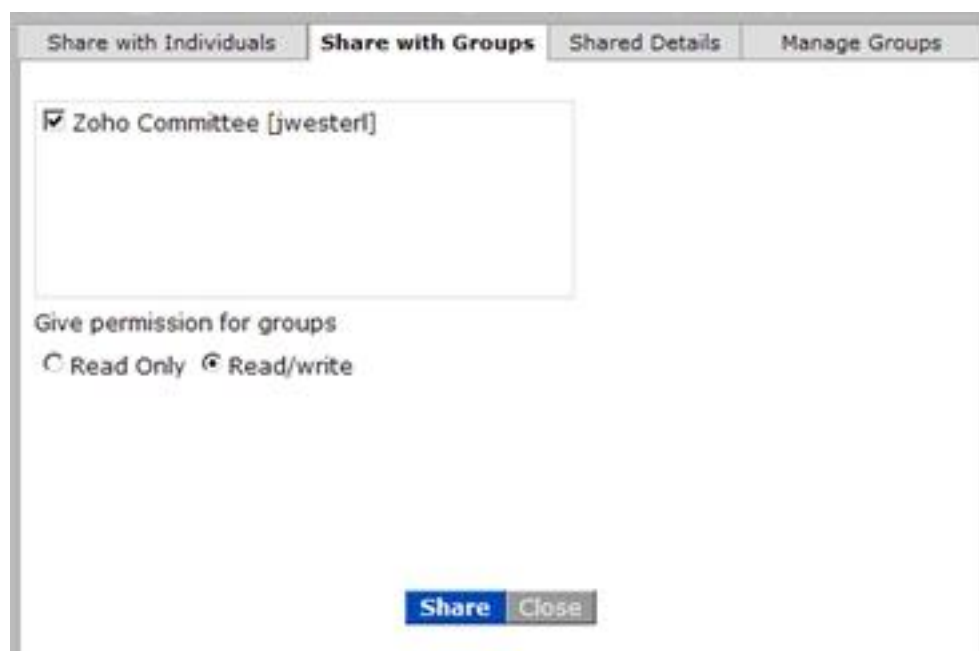
### Document Sharing

Next I want to share the document with the group. So I need to select the Share link. This opens the sharing options window for the document.



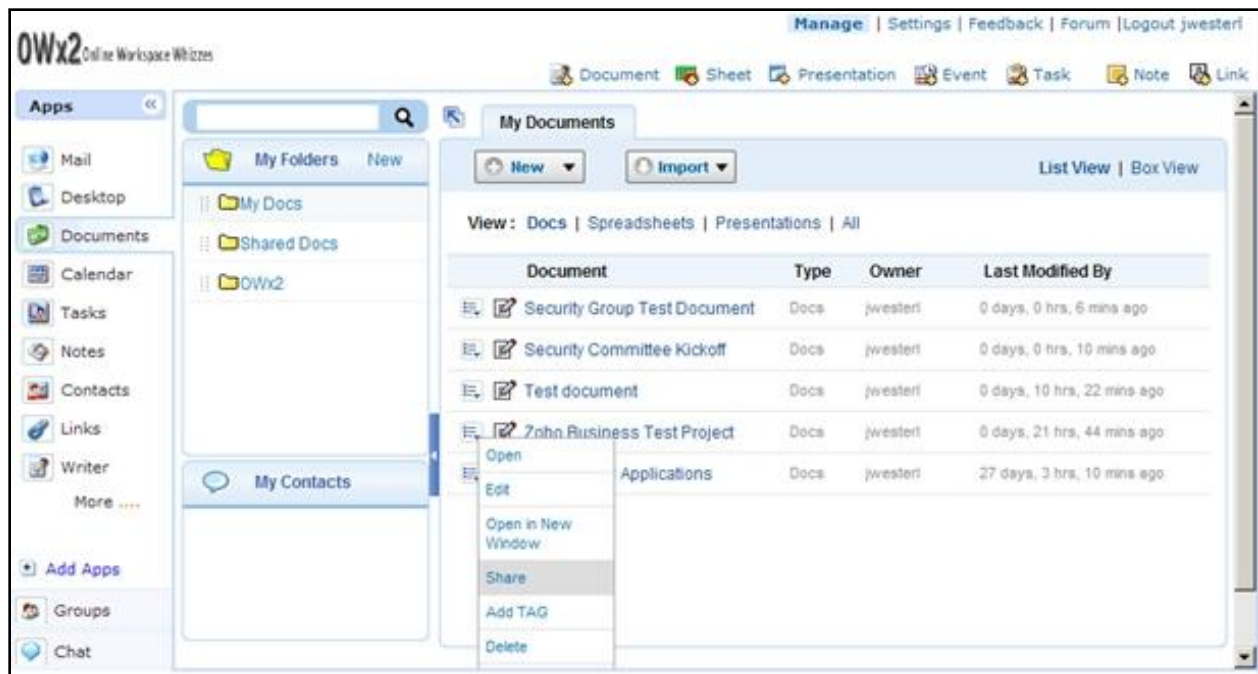
Well I don't have any groups to share this document with. I have setup 2 groups in the business area, but neither of these groups appears here to share the document with. With no help feature it was not possible to research the issue. In the forum area I found other users who had run into the same issue and were also unable to figure out the issue.

If I created a new group in the document sharing area then I could share the document with the group.



This group though does not show up in the Zoho Business area.

I was able to share a document with other users in Zoho Business.

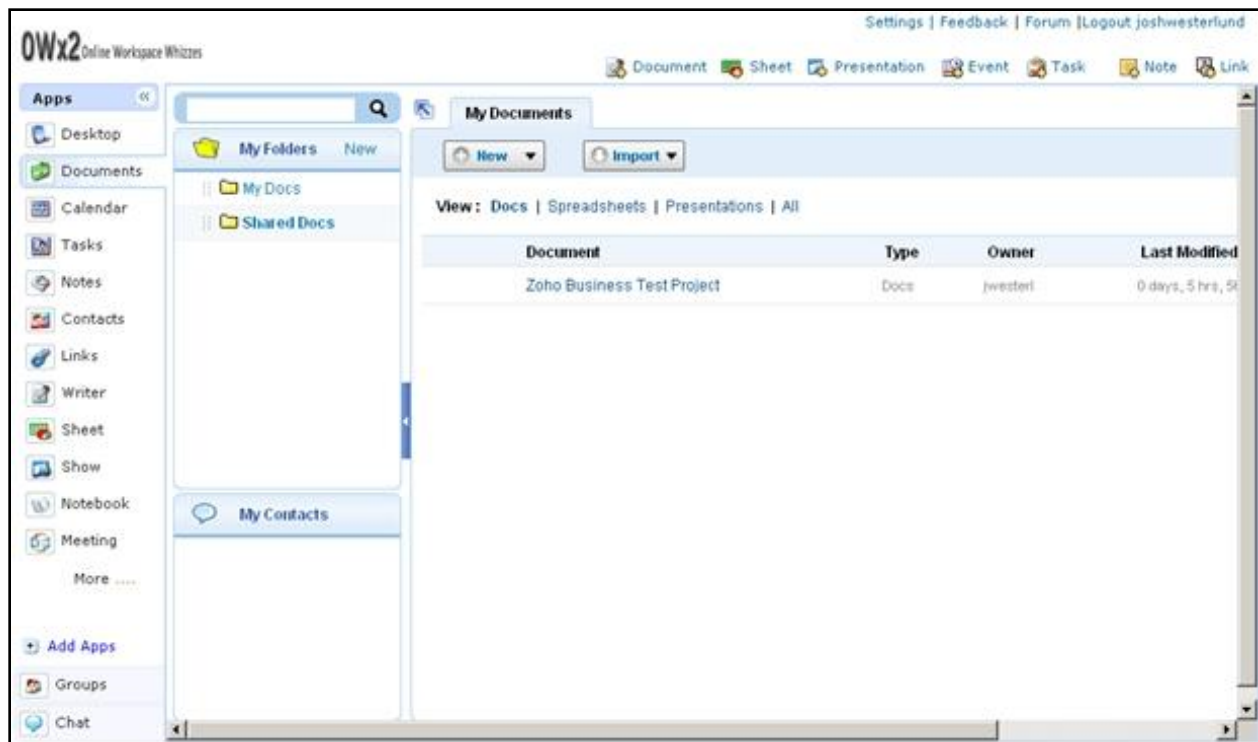


I entered in their email address and once I submitted it if the user is logged into Zoho they will receive a noticed that I have shared a document with them.



If the user is not currently logged in they will receive an email message indicating that a document has been shared with them.

Shared documents also show up under Shared Documents in the Document area.



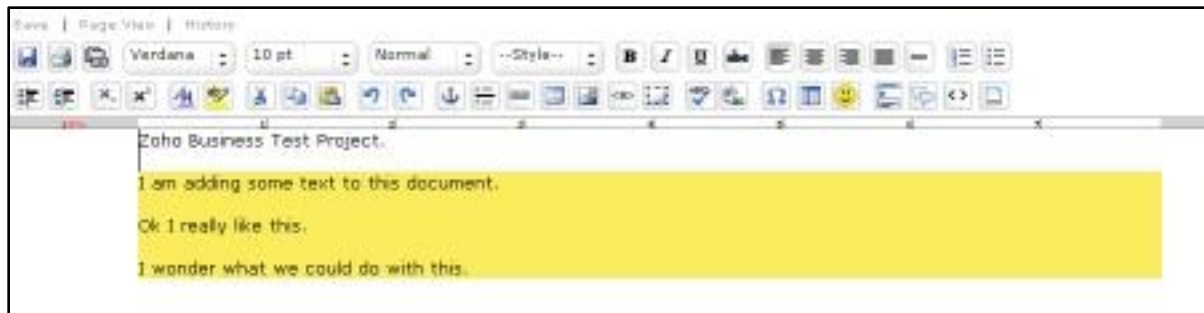
## Collaborative Editing

One of the really nice features of Zoho Business is that you can edit shared documents in collaborative mode. This means that two users can edit the same document and see the changes that each other are making. Here is how it works.

In this example the user that I shared the document with opened it first and started to work on it. When I opened the document I received the following message:



I select close and then I can edit the document. As I make changes to the document the other user sees the changes appear in close to real time. The changes appear in yellow. You do not need to save the document or perform any function for the other user to see your changes.



## Document Versioning

Zoho did do a great job with document versioning as well. When you are editing a document you can select “History” and it will take you to the version history area.



Here you can view different versions of the document and see differences between the versions. If need be you can revert to an older version of the document.

## Issues

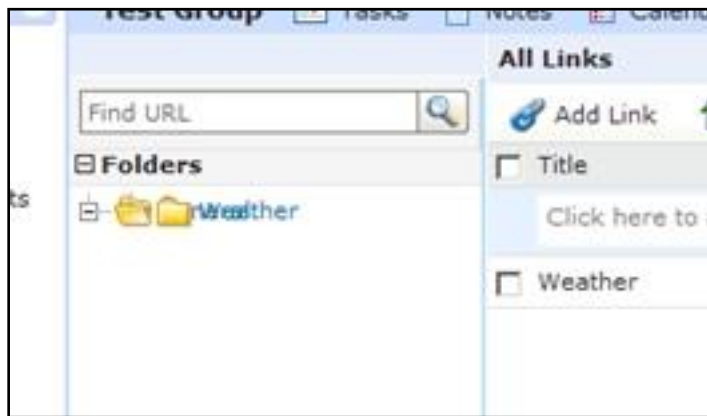
While testing Zoho I did run into a number of issues along the way and I just wanted to take some time to go over them.

The first problem I noticed is that refreshing does not work every will. You have to navigate away from an area and come back into it to see changes. I noticed this several times when sending our invitations, creating groups, and trying to share documents. The site seemed very slow to update. I had to sign in and out several times for changes to show up. I noticed this when creating tasks of other users and making changes to groups. This caused me to get errors because the user was not seeing the changes that I had made and was trying to access the outdated information.

Next I found that to see new groups you must log out and log back in to Zoho. I was also able to create a groups with the same name with the same users. Using the share feature when editing a document I created a group and then I was able to create the same group when I was in the organizations group area. Groups you create when in the sharing area for a document do not show up in the organization area and organization groups you create do not showup in the list of available groups when sharing a document.



I also had issues with labels and messages overlapping with each other. At times I had messages appear over buttons. The messages did not have the ability to close them and you could no longer use the buttons that were behind the label. Here is another example of items overlapping.



Finally Zoho Business also seems to work better in Internet Explorer than in Firefox. There were a number of times that I would have layout issues, a label over the top of a button, in Firefox but when I did the same task in Internet Explorer I would not have the issue.