Phases

The Overview - Phases List view provides a consolidated list of all your phases in various statuses across the portal. You can group Phases by Projects. By default, users will view all the All Phases in the portal. However, users can also select other views using a drop-down.

Milestones are now renamed as **Phases**.

Use cases

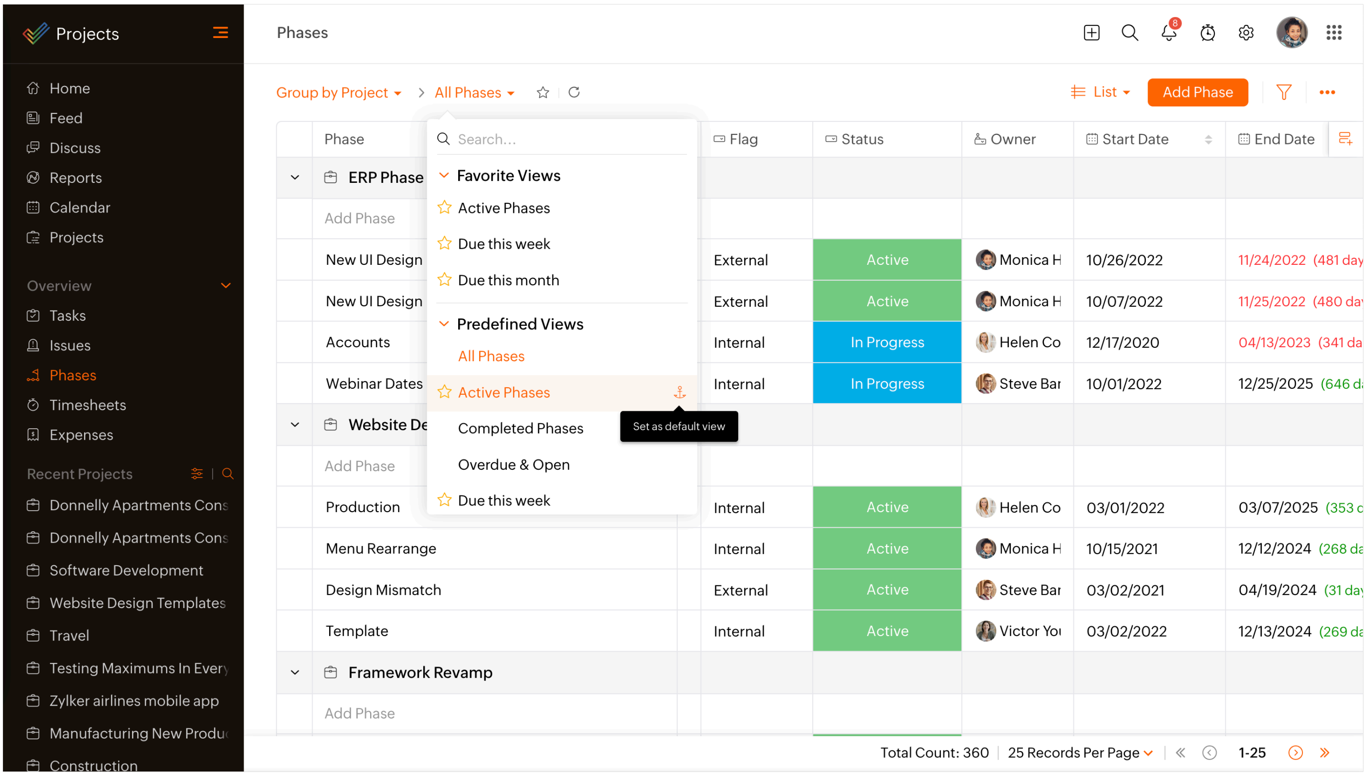
Construction: Material sourcing is one of the important phases in the construction of a building. When this particular phase is completed, we'll be one step ahead of the project completion. Phases in Zoho Projects let us track these milestones at ease.

HR: When there is an event in the organization, HR hosts the event. In such circumstances, the event can be spilt into multiple milestones right from the procurement of necessary goods for the event, stalls to be setup, cultural activities to be performed, setting up of stage, decoration, etc. These phases can be added in Zoho Projects and easily managed.

Marketing/ Sales: When the company decides to launch a new product, the development of the new product is split into phases such as designing, preparation, testing and then the launch. These phases can be tracked in Zoho Projects.

Setting a View as Default

1. Navigate to **Overview** > **Phases** 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.



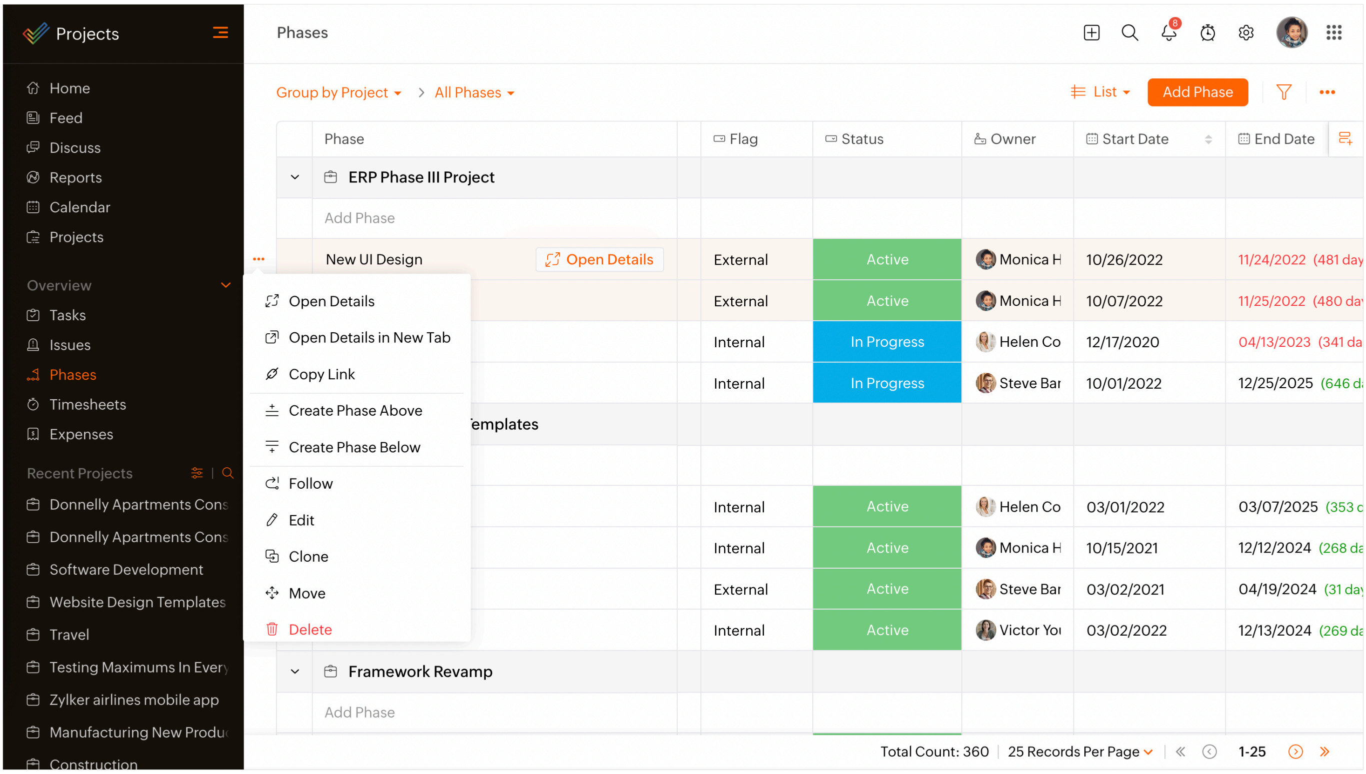
Add Phase

1. Click **Phases** under the Overview section in the left navigation panel.
2. Click **Add Phase**.
3. Select a Project.
4. Give a name for your Phase.
5. Set the Start Date and End Date.
6. Select Phase Owner.
7. Set the phase Flag.
   If the flag is Internal, the phase will not be accessible to the client users. If it is External, it can be accessed by the client users.
8. Fill the custom fields if any.
9. Click **Add**.

Other Actions

1. Hover over a phase.

2. Hover and click ••• to view more options or right click on a Phase.



3. The following actions can be performed.
   - Edit: Modify the phase details
   - Delete: Delete the phase
   - Move: Move phase to another project
   - Follow: Follow the phase and receive updates
   - Chart View: View graphical representation of phase data
   - Copy Link: Copy the direct URL for the phase
   - Associate Blueprint: Associate a blueprint to this phase
   - Dissociate Blueprint: Remove blueprint for this phase

Move Phase Across Projects

1. Click on **Phase** under the Overview section in the left navigation panel.
2. Hover over a phase.
3. Click ••• to view more options.
4. Click **Move**.
5. Select a different project to move the phase.
6. Click **Move**.

Manage Columns

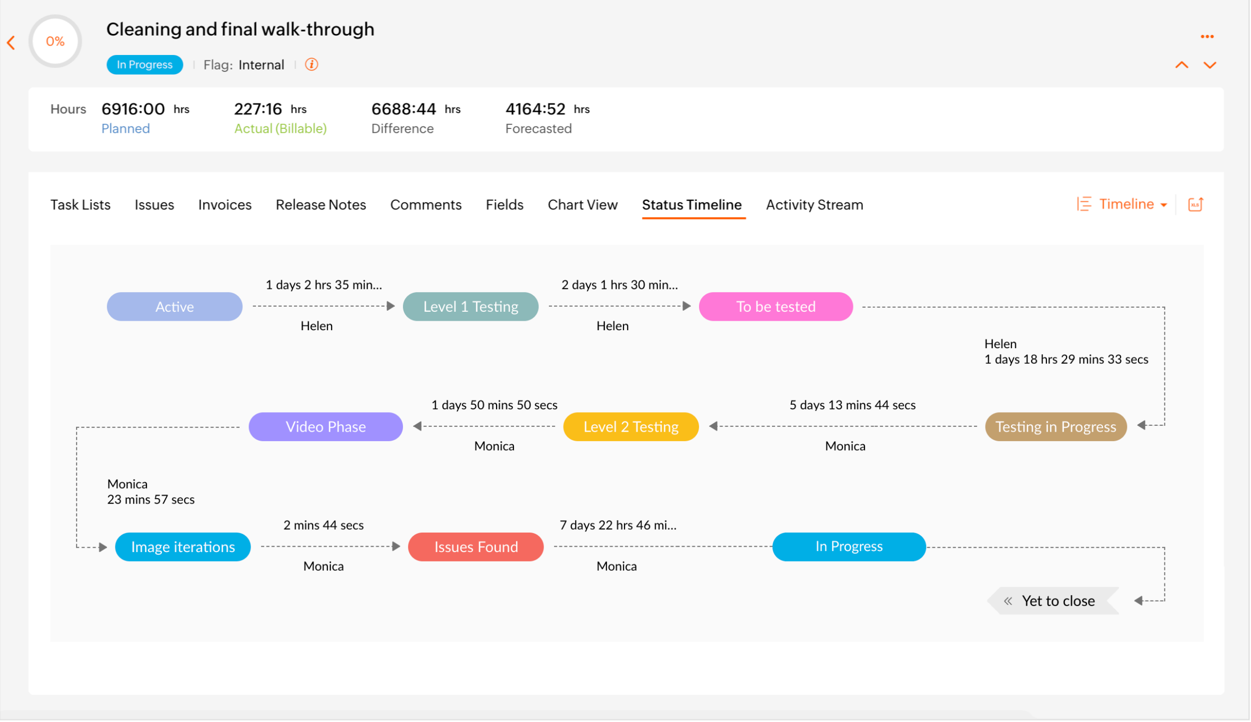
1. Click on the add column icon ().
2. Hover over the project field and click Add or use the search bar to find a specific field.
3. The column will be automatically added.

4. Click the column header, drag and drop the column to reorder.
5. Right click on the column header to Insert Column Before, Insert Column After or Hide Column.

Phase Details

Clicking on a phase will open the details. Users can view the following information:

- Task lists: View and manage associated task lists.
- Budget : View sum of task list budget.
- Issues: View and manage associated issues.
- Invoices: Manage project billing (Zoho Invoice integration required).
- Release Notes: View changes and updates.
- Comments: Add comments and use the screen-grabber to annotate and share files.
- Fields: Access both default and custom fields
- Activity Stream: Track all activity related to the phase.
- Chart View: Visualize phase progress.
- Status Timeline: View all the stages the phase has progressed through and the time spent on each stage.



Export Phase

1. Navigate to the left navigation panel
2. Click **Phase** under the *Overview* section.
3. Click ••• in the upper right corner of the phase list view.
4. Click on the **Export Phases** option.
5. Select the view and the file format.

6. Move the columns from the *Available* section to the *Selected* section. Fields in the Selected section will be exported.
   Hover over a field in the Available section and click > to move it to the Selected section.
   Conversely, hover over a field in the Selected section and click < to move it back the Available section.
7. Click Export and confirm your action.

Add Task List

1. Click a phase to view its details.
2. Click **Add Task List** under the Task Lists tab.
3. Give a Task List Name. Here, you can create a new task list or associate an existing task list or choose from the list of templates.
4. Click **Add.**

Move Task List

1. Click a phasae to view its details. Click on the **Task Lists** tab.
2. Select a task list to enable the Delete and Move options. You can move or delete a single task list or multiple task lists.
3. Select a Project and Choose a Phase to move into.
4. Click **Move**.

Submit Issue

1. Click a phase to view its details. Click on the Issues tab.
2. Click **Submit Issue**.
3. Enter the details and click **Add**.

Tasks

1. Click on **Phases** under the Overview section in the left navigation panel.
2. Click a phase to view its task lists.
3. Click the task list to view its tasks respectively.
4. Click **Add Task**.
5. Enter the details and then click **Add**.

More Reads

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