



# Phase List View

Phases are goal based targets in a project.

1. Click **Phases** in the top navigation panel. You will see a list of phases shown under two categories.
2. Click **Projects** and in the left navigation panel, select the project for which you would like to set phases.

## Benefits

- Track, sort and filter phases based on your requirements
- Edit existing phases
- Export phases
- Inline edit the phase fields

## Add Phase

1. Navigate to the left navigation panel and click **Projects**.
2. Hover over the project for which you would like to add phases and click **Access Project**.
3. Click the **Phases** tab in the top navigation band.
4. Click **Add Phase** in the upper-right corner of the page.
5. Give a name for your Phase and set its *Start and End Dates*.
6. Select an *Owner* for the phase.
7. Set the *Phase Flag*. If the flag is Internal, only the portal users can access the phase. If it is External, the client users can also access it.
8. Click **Add**.

## Edit Phase

1. Navigate to the left navigation panel and click **Projects**.
2. Hover over the project for which you would like to edit phases and click **Access Project**.
3. Click the **Phases** tab in the top navigation band.
4. Hover over an active phase.
5. Click **•••** or click the right mouse button, and select the **Edit** option.
6. Update the necessary fields. The changes will be saved automatically.

PR-139 Donnelly Apartments Construction [View](#)

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All Phases Add Phases

Phases Name	%	Owner	Status	Start Date
<input type="checkbox"/> Planning Capacity...	100%	Hemsworth Monica	Active	21/07/2024
<input type="checkbox"/> [Hidden]	0%	Hemsworth Monica	Active	23/10/2023
<input type="checkbox"/> [Hidden]	0%	Hemsworth Monica	Active	04/07/2022
<input type="checkbox"/> [Hidden]	0%	Hemsworth Monica	Active	31/01/2022
<input type="checkbox"/> [Hidden]	14%	Raj Kavitha	Active	19/10/2021
<input type="checkbox"/> [Hidden]	50%	Hemsworth Monica	On Hold	08/01/2023
<input type="checkbox"/> [Hidden]	0%	Banks Steve	On Hold	12/03/2023
<input type="checkbox"/> [Hidden]	0%	Hemsworth Monica	In Progress	04/11/2021
<input type="checkbox"/> [Hidden]	33%	Banks Steve	Active	26/12/2019
<input type="checkbox"/> Plumbing Rough-in	20%	Lin Brenn Lin	Deferred	31/01/2020
<input type="checkbox"/> Exterior Finishes	100%	Banks Steve	Deferred	23/05/2017

Total Count: 21 | 1-21

## Hide Phase Column

1. Navigate to the left navigation panel and click **Projects**.
2. Hover over the project and click **Access Project**.
3. Click the **Phases** tab in the top navigation band.
4. Hover over the column name which you would like to hide.
5. Click the right mouse button.
6. Select **Hide Column** from the context menu.

## Add Column

1. Navigate to the left navigation panel and click **Projects**.
2. Hover over the project and click **Access Project**.
3. Click the **Phases** tab in the top navigation band.
4. Click **Add column** in the upper-right corner of the page.
5. Hover over the field which you would like to add as a column.
6. Click **Add**.

## Move Phase

1. Navigate to the left navigation panel and click **Projects**.
2. Hover over the project and click **Access Project**.
3. Click the **Phases** tab in the top navigation band.
4. Hover over an active phase.
5. Click **☰** or click the right mouse button, and select the **Move** option.

6. Select a project from the drop-down.
7. Click **Move Phase**.

## Clone Phase

Phases can be cloned to create a copy with Release Notes, Comments, Fields, and the latest status of the Phase for the same project or for use in another project. Cloning a Phase can be done within the same Project or from one Project/Project Template to another Project.

1. Navigate to the left navigation panel and click **Projects**.
2. Hover over the project and click **Access Project**.
3. Click the **Phases** tab in the top navigation band.
4. Hover over an active phase.
5. Click **☰** or click the right mouse button, and select the **Clone** option.

## Clone a Phase From One Project to Another

1. Click **Projects** in the left navigation panel and navigate to your project.
2. Select **Phases** in the top band and click **Add Phase**.
3. Check the box that says **Clone from existing Phase** in the Layout.
4. Select the *Project* or *Project Template* you want to clone from the Project/Project Template drop-down.
5. Enter the other phase details and Click **Add**.

The screenshot shows the BugTracker interface. On the left is a dark navigation sidebar with 'BugTracker' at the top and various menu items like Home, Feed, Discuss, Reports, Calendar, Projects, Issues, Phases, Timesheets, Expenses, Recent Projects, and Invite Users. The main content area is titled 'PR-139 Donnelly Apartments Construction' and has tabs for Dashboard, Issues, Phases, Forums, and Reports. The 'Phases' tab is active, showing a list of 'All Phases' with entries like 'Planning Capacity...', 'Flooring', 'Flooring', 'HVAC', 'Cleaning and final walk-through w...', 'Paint Work final walk-through', 'Insulation', 'Flooring', 'Exterior Landscaping and Finishes', 'Plumbing Rough-in', and 'Exterior Finishes'. On the right, the 'New Phases' form is open. It has a title bar 'New Phases' and a breadcrumb 'Donnelly Apartments Construction'. The form contains: 'Phases Name\*' with the value 'Flooring'; a checked checkbox 'Clone from existing Phases'; a section 'Source Phases details' with 'Project/Project Template\*' set to 'Renovation 2025' and a note 'No Phases are available'; a section 'Phases Information' with 'Flag\*' set to 'Internal' and 'Owner\*' set to 'Hemsworth Monica'; 'Tags' with 'construction' and 'construction projects'; and 'Start Date\*' (15/10/2024) and 'End Date\*' (15/10/2024). At the bottom are 'Add', 'Add More', and 'Cancel' buttons.

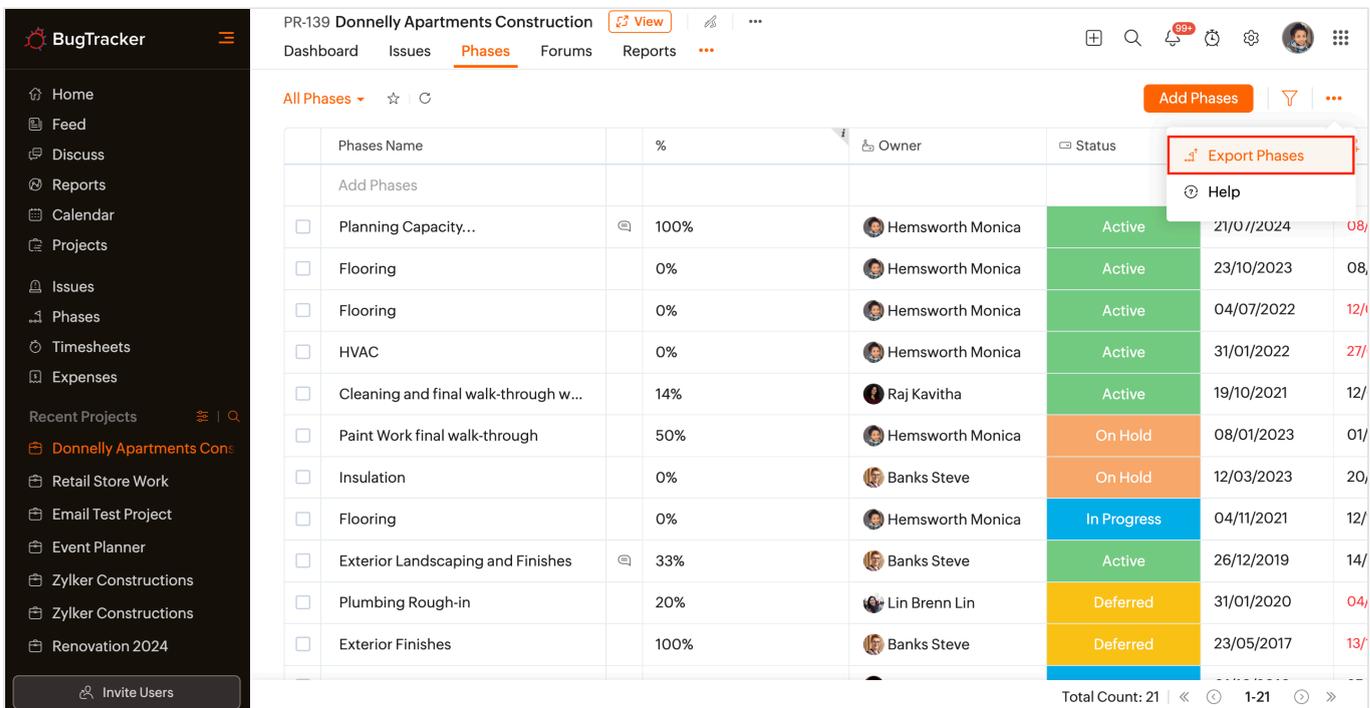
 **Note:** All the Phase Information will be copied from the selected Project Phase or Project Template.

## Reorder Phase

1. Navigate to the left navigation panel and click **Projects**.
2. Hover over the project for which you would like to reorder phases and click **Access Project**.
3. Click the **Phases** tab in the top navigation band.
4. Click **☰** in the upper right corner of the phase list view.
5. Click on the reorder icon  and drag the phase to the new position.
6. Click **Save Order**.

## Export Phase

1. Navigate to the left navigation panel and click **Projects**.
2. Hover over the project and click **Access Project**.
3. Click the Phases tab in the top navigation band.
4. Click **☰** in the upper right corner of the phase list view.
5. Click on the **Export Phases** option.
6. Select the view and the file format.
7. 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.



The screenshot displays the BugTracker interface for a project named "PR-139 Donnelly Apartments Construction". The "Phases" tab is active, showing a list of construction phases. A dropdown menu is open over the "Export Phases" button, showing options for "Export Phases" and "Help".

	Phases Name	%	Owner	Status		
	Add Phases					
<input type="checkbox"/>	Planning Capacity...	100%	Hemsworth Monica	Active	21/07/2024	08/
<input type="checkbox"/>	Flooring	0%	Hemsworth Monica	Active	23/10/2023	08/
<input type="checkbox"/>	Flooring	0%	Hemsworth Monica	Active	04/07/2022	12/
<input type="checkbox"/>	HVAC	0%	Hemsworth Monica	Active	31/01/2022	27/
<input type="checkbox"/>	Cleaning and final walk-through w...	14%	Raj Kavitha	Active	19/10/2021	12/
<input type="checkbox"/>	Paint Work final walk-through	50%	Hemsworth Monica	On Hold	08/01/2023	01/
<input type="checkbox"/>	Insulation	0%	Banks Steve	On Hold	12/03/2023	20/
<input type="checkbox"/>	Flooring	0%	Hemsworth Monica	In Progress	04/11/2021	12/
<input type="checkbox"/>	Exterior Landscaping and Finishes	33%	Banks Steve	Active	26/12/2019	14/
<input type="checkbox"/>	Plumbing Rough-in	20%	Lin Brenn Lin	Deferred	31/01/2020	04/
<input type="checkbox"/>	Exterior Finishes	100%	Banks Steve	Deferred	23/05/2017	13/

Total Count: 21 | 1-21

## Delete Phase

1. Navigate to the left navigation panel and click **Projects**.
  2. Hover over the project for which you would like to edit phases and click **Access Project**.
  3. Click the **Phases** tab in the top navigation band.
  4. Hover over an active phase.
  5. Click **•••** or click the right mouse button, and select the **Delete** option.
  6. Confirm your action.
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