



# Phases in a Project

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Phases are goal based targets in a project. Phases are listed by their status (Active, Completed, and Archived). To access the phases module in Zoho BugTracker:

1. Navigate to the left navigation panel and click on Phases in the Overview drop-down.
2. Click the **Group By** drop-down and select *Project* to organize phases under their respective projects.

To access the phases within a project:

1. Click Project in the left navigation panel.
2. Hover over the project and click Access Project.
3. Click **Phases** in the top navigation band.

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

## Benefits

- Phases are indicators of a project's progress.
- Measure project efficiency through phase completion.

## Predefined Views

View phases based on preset views.

- **All Phases:** lists all the phases in the project
- **Active Phases:** lists all the active phases including overdue and currently due (yet to be completed)
- **Completed Phases:** lists all the phases that are completed
- **Overdue & Open:** lists all the phases that are past their due date and yet to be completed
- **Due this week:** lists all the phases that are due in the current week

- **Due this month:** lists all the phases that are due in the current month

The screenshot shows the BugTracker interface with the 'Milestones' page open. A dropdown menu is visible, highlighting the 'Due this month' option under 'My Views'. The table below shows various milestones with their status and due dates.

Milestone	Flag	Status	Owner	Start Date	End Date
ERP Phase II	External	In Progress	Helen Collier	12/17/2020	04/13/2021
Accounts	Internal	In Progress	Steve Bank	10/01/2022	12/25/2022
Webinar Dates	Internal	In Progress	Steve Bank	10/01/2022	12/25/2022
Website Design	Internal	Active	Helen Collier	03/01/2022	03/07/2022
Production	Internal	Active	Monica Her	10/15/2021	12/12/2021
Menu Rearrange	Internal	Active	Steve Bank	03/02/2021	04/19/2021
Design Mismatch	External	Active	Steve Bank	03/02/2021	04/19/2021
Template	Internal	Active	Victor Youn	03/02/2022	12/13/2022
Framework Revamp					
Arch Milestone					

## My Views

View phases related to you.

- **My Active Phases:** active phases owned by you
- **My Completed Phases:** completed phases owned by you
- **Created By Me:** phases created by you
- **Phases I Follow:** phases that you follow

## Phase Flag

Phases can be marked as Internal and External.

- **Internal:** Only portal users can access the phase and its associated entities.
- **External:** Portal and Client users can access the phase and its associated entities.

## Phase Details

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 a phase and click Open Details to view the Phase Details page.

The screenshot displays the Zoho Bug Tracker interface for a phase titled "Cleaning and final walk-through work items". The phase is marked as "Active" and has a 14% completion rate. It is associated with the "Internal" flag and the "Donnelly Apartments Construction" project. The interface shows a "Submit Bug" button and a table of bugs. The table has columns for Bug ID, Bug description, Status, Reporter, Assignee, Severity, and Created date. The bugs listed are:

#	Bug	Status	Reporter	Assignee	Severity	Created
DC-168	As a user, I would like to receiv...	To be tested	Monica Hemswc	Chloé	Major	11/24/2020 06:33 PM
DC-158	Streamline support tickets	On hold	Helen Collins	Charles Charles Sto	To be resolved lat	04/11/2019 04:13 PM
DC-154	On click of 'Switch to normal m...	To be tested	Helen Collins	Monica Hemsworth	Medium	04/11/2019 04:13 PM
DC-153	Zoom in and zoom out features.	Reopen	Helen Collins	Aravind Rajkumar	Medium	04/11/2019 04:13 PM
DC-140	Water leakage in the third floor...	In progress	Helen Collins	Helen Collins	Major	06/26/2018 02:28 PM
DC-112	Quality of load that was import...	In progress	Helen Collins	Charles Stones	High	02/24/2017 03:49 PM
DC-18	Water shortage	Closed	Victor Young	Victor Young	Minor	02/06/2017 06:28 PM

The total count of bugs is 7, with 1-7 displayed in the bottom right corner.

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

- **Bugs:** View, access, and submit issues for the phase.
- **Invoices (requires [Zoho Invoice integration](#)):** Track all phase invoices.
- **Release Notes:** View phase release notes.
- **Comments:** View and add comments to the phase.
- **Fields (default and custom fields):** Access all the phase information.
- **Activity Stream:** View all activities in the phase.
- **Chart View:** Bug Status, Bug Count by Assignee, and Timesheet Summary Reports.

## Manage Phase

1. Hover over an active phase.
2. Click **...** or right-click to make changes to the phase.

**Edit** and update its attributes;

**Delete** if you no longer need it;

**Move** the phase to another project;

**Follow** the phase and receive updates;

Create phase Above the selected phase;

Create Phase Below the selected phase;

## Chart View to view the Bug and Timesheet Reports;

The screenshot shows the BugTracker interface. On the left is a navigation sidebar with options like Home, Feed, Discuss, Reports, Calendar, Projects, Overview, Bugs, Milestones, Timesheets, Expenses, and Recent Projects. The main area is titled 'Milestones' and shows a list of milestones with a context menu open over one. The context menu includes options like 'Open Details in New Tab', 'Copy Link', 'Create Milestone Above', 'Create Milestone Below', 'Follow', 'Edit', 'Clone', 'Move', 'Delete', and 'Chart View'. Below the milestones is a table of project phases with columns for Project, Flag, Status, Owner, and Start Date. The table contains 15 rows of data with various statuses like Active, On Hold, and Deferred. At the bottom right, there is a summary: 'Total Count: 321 | 25 Records Per Page' and pagination controls.

Project	Flag	Status	Owner	Start Date
Donnelly Apart	Internal	Active	Monica Her	11/14/2023
laboration H	Internal	Active	Monica Her	08/20/2020
nelley site cc	Internal	On Hold	Steve Bank	06/01/2025
laboration H	Internal	Active	Kavitha Raj	08/01/2020
Office Renovati	Internal	On Hold	Kavitha Raj	03/13/2018
Donnelly Apart	Internal	Active	Kavitha Raj	10/20/2021
Donelley site cc	Internal	Deferred	Lin Lin Brer	04/07/2024
Zylker Solutions	Internal	Active	Eduardo Va	06/28/2023
Collaboration H	External	Active	Monica Her	03/04/2020
Office Renovati	Internal	Active	Charles Sto	03/13/2018

The Flag can be set while creating a phase or can be modified by editing a phase.

## Release Notes

Release Notes has the list of the completed bugs in the phase.

1. Click Project in the left navigation panel.
2. Hover over the project and click Access Project.
3. Click **Phases** in the top navigation band.
4. Hover over a phase and click Open Details.
5. Click on the **Release Notes** tab.



- *Skip Weekends* and *Holiday Settings* are used to calculate the number of days:
  - left to complete a phase
  - that have passed the phase due date
  - That are ahead or behind schedule of a completed phase (*shown in Completed Phases*)
- Click  in the upper-right corner to filter the phases based on the *Owner* or *Type*.

### More Reads

[Back to help](#)

[Phase List View](#)