Project Phases

Module Guide: Project Phases

Module Location

Settings > Project > Project Phases

Module Purpose

The **Project Phases** module is used to create templates or standard frameworks for the lifecycle of a project. This module groups a series of activities (tasks) into logical phases or stages, such as "Initiation," "Planning," "Execution," and "Closure." The goal is to standardize project workflows and speed up the process of creating new project plans.

1. Main View (List of Project Phases)

The main page displays all defined project phase templates.

View Explanation

- **Filter**: Allows quick searching by **Phase Code**.
- **Project Phase List Table**:
  - **Phase Code**: A unique code for each phase template.
  - **Phase Name**: A descriptive name of the phase (e.g., "Analysis & Design," "Development," "Testing").

- **Milestone?**: Indicates whether completing this phase is considered an important milestone in the project.

- Currently, the table shows "...Data not found...", meaning no phase templates have been created.

- **Action Buttons**:
  - **New**: Opens the form to create a new phase template.

2. Add Project Phase Page

This is the place where a phase template is built by grouping relevant activities.

View Explanation

- **Basic Information**:
  - **Phase Code**: A unique code for the phase template.
  - **Phase Name**: A descriptive name for the phase.
  - **Notes**: A description or instructions related to this phase.
- **Activity List**:
  - This is the core of the module, where users can associate one or more standard activities with this phase.
  - By clicking the **[+]** icon, users can select activities from the previously created **Project Activity** master data.

- The table will display the **Activity Code**, **Activity Name**, and **Standard Order** of the selected activities.

3. Steps to Create a Phase Template

1. Ensure all relevant activity templates have been created in the **Project Activity** module.
2. From the main page, click the **New** button.
3. Fill in the **Phase Code**, **Phase Name**, and **Notes**.
4. Click the **[+]** icon in the Activity List section to open a popup or selection list of activities.
5. Select all activities that belong to this phase.
6. Click **Save**.

4. Integrated Workflow & Business Process

- **Work Breakdown Structure (WBS) Framework**: This module, together with the **Project Activity** module, forms the foundation of the company's standard WBS framework. Phases are level 1 of the WBS, and Activities are level 2.
- **Project Plan Creation**: When a project manager creates a new project, they can select this phase template. The system will then automatically build the entire phase structure and the list of activities under it, complete with estimations of the required resources. This drastically reduces planning time.

- **Project Monitoring and Reporting**: With a standardized phase structure, management can easily monitor project progress against the established timeline. Progress reports can be aggregated at the phase level, providing a concise, high-level overview for stakeholders.

- **Milestone Management**: Phases marked as milestones become key focus points in tracking. Completing a milestone often triggers client payments or approvals to proceed to the next phase.

5. Tips & Important Notes

- Define phases that reflect a logical and common project lifecycle in your organization (e.g., following waterfall or agile methodologies).

- The order of activities within a phase is very important. Ensure the **Standard Order** is set correctly to reflect dependencies among activities.

- The management of this module should ideally be performed by the **Project Management Office (PMO)** or the project management team to ensure consistent standardization across the company.

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