

Add Phases

Summary

This tutorial guides you through creating and publishing phases in BuilderPal to organize your project actions and schedules. Phases help structure complex projects by grouping related tasks, making it easier to track progress and dependencies—essential for efficient project management.

Prerequisites

- You must have an active project created in BuilderPal.

Steps

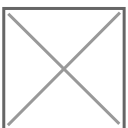
1. **Select Phase from the actions section in the add new dropdown menu.** Select "Phase" from the "+ New" dropdown menu in the top right corner.



2. **Give your phase a title and set the dates.** Enter a descriptive title for the phase and specify the start and end dates using the provided date pickers.



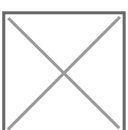
3. **Add any additional notes relevant to the phase.** Include any extra details, instructions, or context in the notes field to provide more information about the phase.



4. **Click Publish.** Finalize the phase by clicking the **Publish** button to make it active in your project.



5. **Once published, choose to add new or existing actions to the phase.** After publishing, select and add either new actions or existing ones to associate them with the phase for better organization.



6. **View your phase in the schedule and actions pages.** The phase will now appear in your project's schedule and actions views, helping to organize and visualize related actions.



Confirmation

Your phase appears in the project schedule and actions list, grouping related actions for better visibility and organization.

FAQ

Can I edit a phase after publishing?

Yes, navigate to the phase in your actions or schedule, then update the title, dates, notes, or associated actions as needed.

What happens if I delete a phase?

Deleting a phase removes it from the schedule but does not delete linked actions; they remain as standalone items in the project.

How do phases affect dependencies or predecessors?

Phases group actions visually but do not automatically set dependencies; use the predecessors tool separately to link actions across phases.

Why can't I add a phase to an archived project?

Archived projects are read-only; reactivate the project status first to enable editing or adding phases.

Related Articles

- [Get Started with Scheduling & Calendars](#)
- [Scheduled Work Actions & Schedules](#)
- [Create & Assign Actions](#)
- [Predecessors](#)
- [Project Schedule](#)

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