

# **Global Add**

Global Add makes it easy to add bugs, phases, timesheets, forums, projects, and users without navigating to their specific modules. Simply click  $\pm$  on the upper right corner of the top band to add new entries.

## **Benefits:**

- Add work items from any page.
- Add work items without leaving the current page.
- Immediately open the work item if needed.

## Bug

- 1. Click  $\pm$  in the top band of Zoho BugTracker.
- 2. Hover over to view more options.
- 3. Select Issue.
- 4. Fill in the details and click Add. Click Add More to save and add another task.

| 🖞 BugTracker 🛛 🖃   | Home   | Bug           |                           |                  |
|--|--|---------------|---------------------------|------------------|
| 6 Home<br>D Feed   | Welcome Monica Hemsworth<br>Company: Zylker Corporations, Chennai                                      | 茇<br>Bug Tin  | ⊘ 🖻<br>nesheet Project    | ~                |
| <ul> <li>Discuss</li> <li>Reports</li> <li>Calendar</li> <li>Projecte</li> </ul> | 15<br>Open Bugs Closed E   | Q₹<br>User Mi | 루 원<br>ilestone Forum     |                  |
| Overview Y   | If My Expense > Expense Claims +       DATE     PROJECT       06/07/20     Donnelly Anartments Constru | Event Do      | C ?!<br>Document Time-off |                  |
| Milestones<br>Timesheets<br>Expenses   | 06/07/20 Donnelly Apartments Constru-<br>06/03/20 Donnelly Apartments Constru-                         |               |                           |                  |
| Recent Projects 🛛 🗯 🗆 Q<br>PR-139 Donnelly Apartment                             | 09/24/20 Donnelly Apartments Constru-<br>09/23/20 Donnelly Apartments Constru-                         |               |                           | Maximum 10 files |
| 🖩 Inspire 2020<br>🖩 Century LB<br>🖻 Construction template                        |  |               |                           |                  |
| ERP Mobile App     PR-578 Wedding Planner  | II My Milestones   |               |                           |                  |

## Phase

1. Click  $\textcircled{\pm}$  in the top band of Zoho BugTracker.

- 2. Hover over **to** view more options.
- 3. Select Phase.
- 4. Fill in the details and click **Add**.
  - Select *Internal* if the visibility is only to the project users.
  - Select *External* if the visibility is to both client and project users.
- 5. Click **Add** to save the new phase.

## Timesheet

- 1. Click  $\pm$  in the top band of Zoho BugTracker.
- 2. Hover over **III** to view more options.
- 3. Select Timesheet.
- 4. Fill in the details and click **Add**.

## Forum

- 1. Click  $\textcircled{\pm}$  in the top band of Zoho BugTracker.
- 2. Hover over **iii** to view more options.
- 3. Select Forum.
- 4. Enter a title for your forum, type a brief on your title in the Description section, attach files, and choose a Category (if any).
- 5. Click **Publish** to post the forum.

## Project

- 1. Click  $\boxplus$  in the top band of Zoho BugTracker.
- 2. Hover over **iii** to view more options.
- 3. Select Project.
- 4. Fill in the details and click **Add**.

## Users

- 1. Click  $\pm$  in the top band of Zoho BugTracker.
- 2. Hover over **iii** to view more options.
- 3. Select Users.
- 4. For Existing Users, select the email addresses of the user and then click **Add**.
- 5. For New Users, enter the email addresses, select the *Role*, *Profile*, and enter the *Rate Per Hour*. Click **Add**.

## Events

- 1. Click  $\textcircled{\pm}$  in the top band of Zoho BugTracker.
- 2. Hover over 🗰 to view more options.

- 3. Select Event.
- 4. Select a project and enter an event title.
- 5. Set the start and end date for the event.
- 6. Schedule a reminder, add a location, and add comments if required.
- 7. Set a frequency for the event.
- 8. Click Save.

### **Documents**

- 1. Click  $\boxplus$  in the top band of Zoho BugTracker.
- 2. Hover over **to** view more options.
- 3. Select Document.
- 4. Select a project.
- 5. Attach your files and click **Add**.

## Time-Off

This requires Zoho People integration.

- 1. Click  $\textcircled{\pm}$  in the top band of Zoho BugTracker.
- 2. Hover over **to** view more options.
- 3. Select Time-Off.
- 4. Fill in the details and submit.

#### **More Reads**

Portal Home Keyboard Shortcuts in Zoho BugTracker