

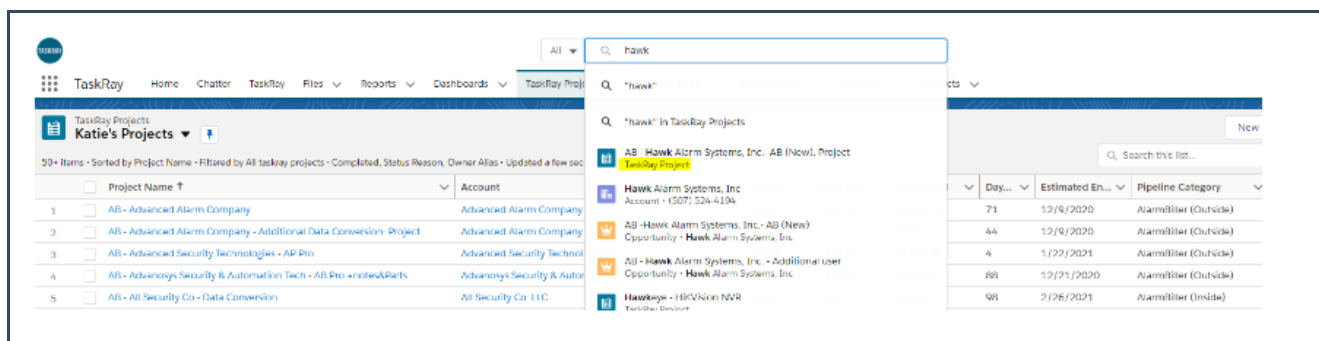
Implementations - How To Book Resource Time (Legacy\Outdated)

01/04/2024 4:42 pm EST

This guide steps through the process of booking a resources time in Salesforce. With the Project Plan complete, the Project Manager will assign dates, roles and other details to each task in the project.

Step 1: Locate the Project in Salesforce

Find the Project by searching for the customers name in the search box.



Make sure you click on the TaskRay Project associated with the customer and specific project.

Step 2: Locate the Task for the Resource on the Project

Within the project under the Related List Quick Links section, choose TaskRay Tasks.

TaskRay Project
AB - Hawk Alarm Systems, Inc.- AB (New): Project

Parent Project Start Date 11/24/2020 Estimated End Date 1/29/2021 Owner Katie Bosn

Deliver Go-Live

Related List Quick Links

- TaskRay Team (5)
- TaskRay Tasks (10+)**
- Files (0)
- Notes (0)
- TaskRay Project History (10+)

TaskRay Tasks
 10+ Items - Sorted by Sort Order - Updated a few seconds ago

<input type="checkbox"/>	Task Name	Sort Order ↑	List	Task Group	Start Date	Estimated End Date
1	<input type="checkbox"/> Send Email Introduction & Kick off call Invite	0	Completed		11/24/2020	11/24/2020
2	<input type="checkbox"/> Kick Off Call	1	Completed		12/4/2020	12/4/2020
3	<input type="checkbox"/> Create Training Request	2	In Progress			
4	<input type="checkbox"/> Data Validation	4	Completed		12/4/2020	12/4/2020

Locate the specific task that you are wanting to assign to a resource and click into that specific task to edit.

TaskRay Projects > AB - Hawk Alarm Systems, Inc.- AB (New): Project
TaskRay Tasks

18 items - Sorted by Sort Order - Updated a few seconds ago

<input type="checkbox"/>	Task Name	Sort Order ↑	List	Task Group	Start Date
1	<input type="checkbox"/> Send Email Introduction & Kick off call Invite	0	Completed		11/24/2020
2	<input type="checkbox"/> Kick Off Call	1	Completed		12/4/2020
3	<input type="checkbox"/> Create Training Request	2	In Progress		
4	<input type="checkbox"/> Data Validation	4	Completed		12/4/2020
5	<input type="checkbox"/> Create Project Plan	5	Completed		12/7/2020
6	<input type="checkbox"/> Send Training Links to Customer	6	Completed		12/4/2020
7	<input type="checkbox"/> Send Forte/Dex Document	7	Completed		12/4/2020

Step 3: Change the Owner of the Task to the Correct Resource

Choose the symbol to the right of the owner to change it to the correct resource.

TaskRay Task
Create Training Request

Project: AB - Hawk Alarm Systems, Inc. - AB (New): Project
 Estimated End Date: [blank]
 List: In Progress
 Owner: Katie Bosn

Progress: [Stalled] → [In Progress] → [Completed]

Details	Related
Task Name	Create Training Request
Project	AB - Hawk Alarm Systems, Inc. - AB (New): Project
Task Group	[blank]
List	In Progress
Priority	Normal
Milestone	<input type="checkbox"/>
Internal Only	<input type="checkbox"/>
Blocked	<input type="checkbox"/>
Archived	<input type="checkbox"/>
Description	Financial Specialist preparing Journal Entries
In-Flight Task Information	
Start Date	[blank]
Estimated Business Duration	[blank]

**Add a comment in Chatter if you know any specifics on when the customer wants to train or who the point of contact should be for the resource to reach out to.

TaskRay Task
Create Training Request

Project: AB - Hawk Alarm Systems, Inc. - AB (New): Project
 Estimated End Date: [blank]
 List: In Progress
 Owner: Katie Bosn

Progress: [Stalled] → [In Progress] → [Completed] → [Mark List as Complete]

Details	Related
Task Name	Create Training Request
Project	AB - Hawk Alarm Systems, Inc. - AB (New): Project
Task Group	[blank]
List	In Progress
Priority	Normal
Milestone	<input type="checkbox"/>
Internal Only	<input type="checkbox"/>
Blocked	<input type="checkbox"/>
Archived	<input type="checkbox"/>
Description	Financial Specialist preparing Journal Entries
In-Flight Task Information	
Start Date	[blank]
Estimated Business Duration	[blank]

Activity: Send With DocuSign | **Chatter**

Post | Poll

Share an update

Search this feed

Katie Bosn
 December 4, 2020 at 3:33 PM
 Hi @Kaitlyn Deminger Hawk alarm purchased 3 hours of 1on1 training. They are aware that it will be in January at the earliest.

Like | Comment

Write a comment

To Change the Owner of Multiple Tasks to One Resource:

Start on the Project and choose TaskRay Tasks.

TaskRay Project
AB - Hawk Alarm Systems, Inc.- AB (New): Project

Parent Project Start Date 11/24/2020 Estimated End Date 1/29/2021 Owner **Katie Bosn**

Related List Quick Links
 TaskRay Team (5) TaskRay Tasks (10+) Files (0) Notes (0) TaskRay Project History (10+)

TaskRay Tasks
 10+ Items - Sorted by Sort Order - Updated a few seconds ago

<input type="checkbox"/>	Task Name	Sort Order ↑	List	Task Group	Start Date	Estimated End Date
<input type="checkbox"/>	1 Send Email Introduction & Kick off call Invite	0	Completed		11/24/2020	11/24/2020
<input type="checkbox"/>	2 Kick Off Call	1	Completed		12/4/2020	12/4/2020
<input type="checkbox"/>	3 Create Training Request	2	In Progress			
<input type="checkbox"/>	4 Data Validation	4	Completed		12/4/2020	12/4/2020

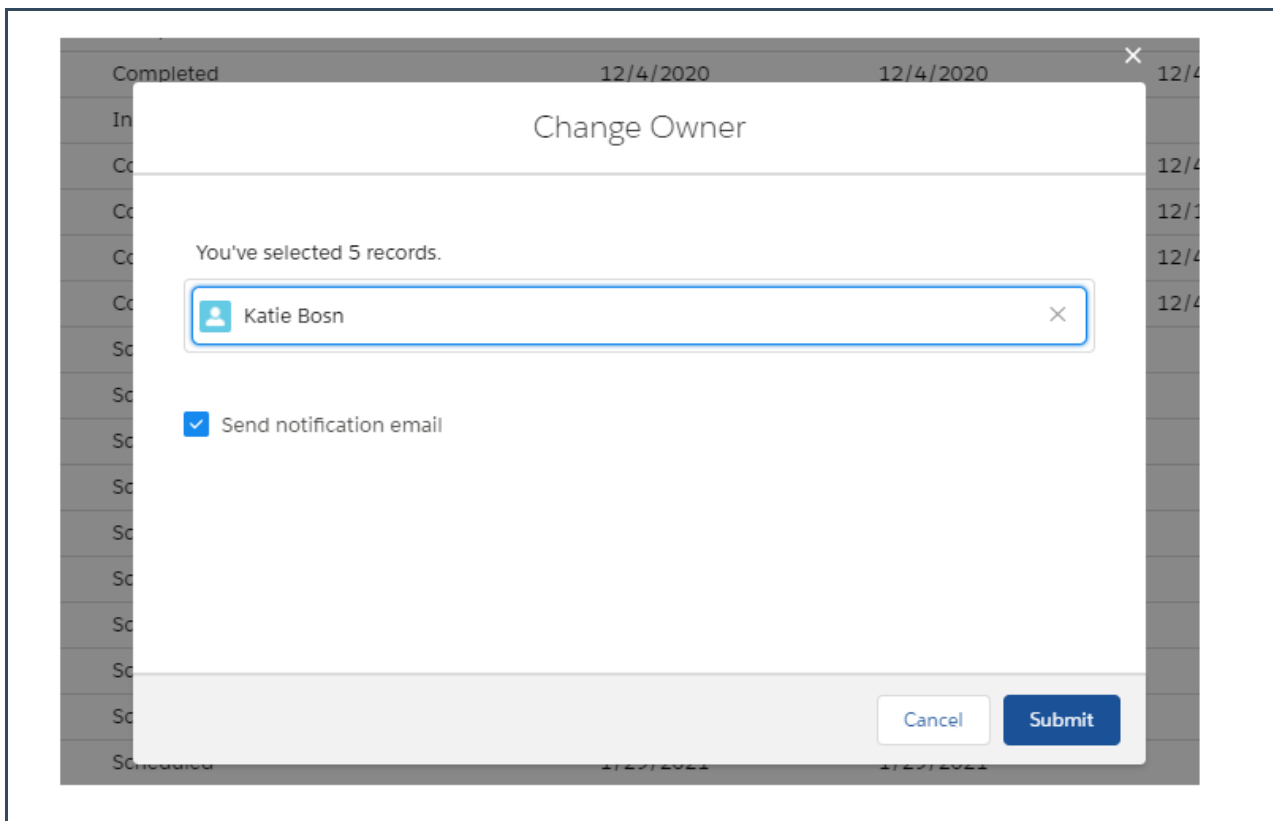
Check the box next to each task you want to assign to 1 resource and then choose Change Owner on the upper right-hand side.

TaskRay Tasks

3 items selected

<input type="checkbox"/>	Task Name	Sort Order ↑	List	Task Group	Start Date	Estimated End Date	Actual Completion Date	Project Resource Role	Owner Alias
<input type="checkbox"/>	1 Send Email Introduction & Kick off call Invite	0	Completed		11/24/2020	11/24/2020	11/24/2020	Project Manager	kbosn
<input type="checkbox"/>	2 Kick Off Call	1	Completed		12/4/2020	12/4/2020	12/4/2020	Project Manager	kbosn
<input type="checkbox"/>	3 Create Training Request	2	In Progress					Project Manager	kbosn
<input type="checkbox"/>	4 Data Validation	4	Completed		12/4/2020	12/4/2020	12/4/2020	Data Conversion Specialist	kbosn
<input type="checkbox"/>	5 Create Project Plan	5	Completed		12/7/2020	12/9/2020	12/11/2020	Project Manager	kbosn
<input type="checkbox"/>	6 Send Training Links to Customer	6	Completed		12/4/2020	12/4/2020	12/4/2020	Project Manager	kbosn
<input type="checkbox"/>	7 Send Portal (Doc Document)	7	Completed		12/4/2020	12/4/2020	12/4/2020	Project Manager	kbosn
<input checked="" type="checkbox"/>	8 C1 Test Conversion	8	Scheduled		1/4/2021	1/8/2021		Data Conversion Specialist	jedha
<input type="checkbox"/>	9 Audit C1 Conversion	9	Scheduled		1/6/2021	1/8/2021		Customer	kbosn
<input checked="" type="checkbox"/>	10 C2 Test Conversion	10	Scheduled		1/11/2021	1/13/2021		Data Conversion Specialist	jedha
<input type="checkbox"/>	11 Audit C2 Conversion	11	Scheduled		1/14/2021	1/19/2021		Customer	kbosn
<input checked="" type="checkbox"/>	12 Final Changes	12	Scheduled		1/20/2021	1/22/2021		Data Conversion Specialist	jedha
<input checked="" type="checkbox"/>	13 Send Data Sign off	13	Scheduled		1/26/2021	1/26/2021		Data Conversion Specialist	jedha
<input type="checkbox"/>	14 Upload Data Signoff from DocuSign	14	Scheduled		1/27/2021	1/27/2021		Project Manager	kbosn
<input checked="" type="checkbox"/>	15 Go Live Conversion	15	Scheduled		1/28/2021	1/28/2021		Data Conversion Specialist	jedha
<input type="checkbox"/>	16 Send RMR Document	16	Scheduled		1/29/2021	1/29/2021		Project Manager	kbosn
<input type="checkbox"/>	17 Send Project Completion Survey	17	Scheduled		1/29/2021	1/29/2021		Project Manager	kbosn
<input type="checkbox"/>	18 Project Complete	18	Scheduled		1/29/2021	1/29/2021		Project Manager	kbosn

Next, type in the persons name and choose Submit.



Next Stage: Prepare for Implementation

The next step in the Implementation Process is to review all necessary Data, Software and Configurations. Details for this process can be found [here](#).