

Creating the Monthly PS Schedule

09/03/2024 12:33 pm EDT

Purpose

[Clone the Project Template](#)

[Modify the Working Days](#)

[Validate Scheduling Reports](#)

[Recurring Schedule Tasks](#)

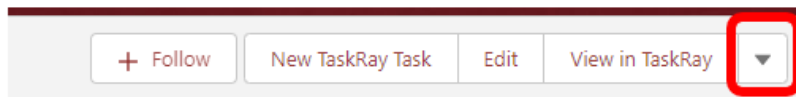
The purpose of this document is to outline the steps required to create the Monthly PS Schedule project for each month. This project creates a task for every working day of the month, so all working days will show on the Project Scheduling reports used by Professional Services to schedule all resources.

Without adding these days, only days where a resource has time booked or blocked would show, and not all working days.

At the start of each month (if not already created), a new project is created from the template [PS Scheduling Monthly Template](#) for the next month to extend the view of the PS Scheduling reports. Example: On April 1, the May project should be created.

Open the project [PS Scheduling Monthly Template](#) and follow the steps below to clone it:

1. From the upper right corner of the project screen, click the drop-down and select 'Clone with Task'



2. A new project will be created with the same project name with the word 'Copy' in front
3. Change the project name = PS Scheduling Month Year
 1. Example: [PS Scheduling May 2022](#)
4. Confirm the Project Type = Internal
5. Change the owner of the project to Professional Services Projects

The project should have 31 tasks, one for each possible day of the month. Each task is assigned to resource = 'TaskRay Unassigned' This prevents the tasks from appearing on any one resource's calendar to complete.

The 'Sort Order' field will correlate to the day of the month as well. Follow the steps below to adjust them to correctly appear on the Project Scheduling Reports.

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The tasks now need to be modified to reflect the working days in the month:

1. Open the project task list
2. Change tasks owner to yourself for all tasks
3. Open the Project in the TaskRay view
4. Close the Project information screen
5. Open the gantt view by clicking the Plan View icon (to the left of the calendar icon):



6. Click the arrow to the far left of the first task name box to bring the first task into the view if you are unable to see the task
7. Change the start date of the first task to the first day of the new month for each task to match the day of the month
 1. The balance of the tasks will move, but will NOT all move to the correct dates. There should be one task for each working day of the month only with the start/end date of the task the same as that working day
8. Adjust the subsequent tasks so they align with the next day. The task name and sort order number should align with the day of the month on the calendar
9. Highlight all tasks on non working days of the month (weekends, US Holidays) and Fridays to delete them
 1. Hold Ctrl key down to highlight all the days
 2. Drag the garbage can icon to one of the highlight tasks to delete them all at once
10. Lock all remaining task dates to prevent them from moving
11. Change all task status to Completed
 1. This prevents the scheduling reports for late tasks from showing days in the past with incomplete tasks when no resource has a late task
12. Change task owner on all tasks back to TaskRay Unassigned
 1. Select all tasks
 2. Click Change Owner
 3. Click the drop-down next to the Search Users icon
 4. Select Queue
 5. Search for TaskRay Unassigned and select

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The final step is to validate that each working day of the month is represented on the PS Scheduling reports

1. Open the report [Project Scheduling Report](#)
2. Confirm the row for TaskRay Unassigned has each day listed with 8hrs as shown below

TaskRay Task: Owner Name ▾	Start Date → ▾	3/28/2022	3/29/2022	3/30/2022	3/31/2022	4/1/
<input type="checkbox"/> James Fraser	Sum of Estimated Time (hrs) Record Count	0.00 0	8.25 7	8.00 3	4.00 1	
<input type="checkbox"/> Jason Cogzell	Sum of Estimated Time (hrs) Record Count	2.00 1	2.00 1	4.00 2	7.00 2	
<input type="checkbox"/> Philip Ferraro	Sum of Estimated Time (hrs) Record Count	8.00 1	4.00 1	6.00 3	8.00 1	
<input type="checkbox"/> TaskRay Unassigned	Sum of Estimated Time (hrs) Record Count	8.00 1	8.00 1	8.00 1	8.00 1	
Total	Sum of Estimated Time (hrs) Record Count	18.00 3	22.25 10	26.00 9	27.00 5	

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Specific resources that have schedules that vary from a standard Monday-Friday work week may need to have a recurring task added to their schedule to block out non working days. [Create Recurring Project Tasks](#) walks through the process of adding a new recurring task.

Currently the following resources have a recurring task to block out days in their schedule that require steps to extend the block out days for the month just added:

- Bill Fox (task under task group: Bill Fox Schedule on project: [PS 2023 Scheduling](#))
 - Monday's - out of office Monday
 - Tuesday - Support
 - Wednesday - Support
- Jamie Fraser (task under task group: Jamie's Recurring on project: [PS Scheduling Project](#))
 - Out of office Monday from 3:30pm EST to 5pm EST
 - From April 8th 2024 - Dec 30th 2024
- Phil Ferraro (task under task group: Phil Ferraro Schedule on project: [PS 2023 Scheduling](#))
 - Mondays between 6-8am MT

To continue the recurring day blocks:

1. Open the project the original task was created under (listed above for each resource) in the TaskRay Plan View
2. Locate the Task Group = resource name from above
3. Locate the 3 tasks with List = Needs Scheduling
4. Complete the tasks for each , which will generate the next week's tasks
 1. Continue to complete the tasks for each week of the month until all weeks of the month have a completed task
5. Leave one task in the next month as Needs Schedule

6. Review the scheduling report to confirm the appropriate days are blocked off

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