

Viewing a Project in TaskRay View

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Purpose

Projects can be viewed in two ways; within Salesforce, which is the most common tool, and within TaskRay which is the Services module for Salesforce.

This document walks the user through how to open and view a project in the TaskRay view vs the Salesforce view. It provides a high-level overview of each of the view types.

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Viewing a Project in TaskRay View

To create a recurring task, you will first need to open the project in the Task Ray view:

1. From the Menu bar in Salesforce, select TaskRay
2. Select the 'All Work' tab

3. Enter the project name in the project box or select it from the project list

4. The Project information box will open for review/modification as necessary

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Viewing Project Tasks

There are several different views for project tasks within the TaskRay project view:

- Kanban View
- Row View
- Plan View (or Gantt View)
- Calendar View
- List View

From any view, the task can be double-clicked to open, view, and modify the task details.

To select the preferred view:

1. Select the appropriate icon from the 'All Work' section

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Kanban View

Kanban View is grouped by task status:

You can move the task from one status to another by selecting the task and either using the arrow key to move to the next/previous list or by dragging and dropping to the appropriate status column

You can also select the task sorting method by selecting the 'Whiteboard Sort' drop-down option you prefer

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Row View

In Row View, the tasks are shown based on the option selected in the Whiteboard Sort option. Here it is shown by the Estimated End date, showing tasks that are late vs upcoming:

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Plan View

Plan View provides a Gantt view for the project, where project tasks are shown via a timeline along with task

dependencies.

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Calendar View

This view provides visibility within a calendar:

It can be exported or printed by clicking the download icon at top right of screen.

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List View

This view shows tasks in a list and allows the quick addition of a new task:

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Viewing Task Details

From any view, double-click a specific task to open, view, and modify the task details:

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