

# Create Recurring Project Tasks

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## Purpose

Recurring tasks can be used to schedule tasks that repeat throughout a project. The most common use of a recurring task is to block time on a resource's schedule that is consistent from week to week.

This document walks the user through how to set up and maintain a recurring task. It is important to note the following:

- Recurring task options are only visible in the TaskRay view
- To block out a schedule for a weekly event, you have to close the first task for the second week task to be created, then close that task, and so on until you have blocked out every weekly occurrence for the months available to schedule
  - In order to close a task without time posted, the task Resource Role field must be blank
  - If the recurring task requires time entry, this method cannot be used to block out schedule in advance

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## Task Setup

To create a recurring task, you will first need to create the task within the project, then open the project in the Task Ray view to modify it. See [Viewing a Project in TaskRay View](#) for instructions to open projects in TaskRay view.

1. Locate the task and double-click to open it
2. Set the task start/estimated end dates to the same date (scheduling tasks can only span 1 day)
3. Click the Repeat tab
4. Under 'Repeat Options' select the following
  - a. Create New Task – frequency of task
    - i. Does Not Repeat
    - ii. Daily

iii. Weekly

iv. Monthly

v. Yearly

b. Repeat Every – enter the frequency of when the task will repeat

i. Example: Create New Task = Weekly and Repeat Every = 1

i. A new task will be created each week

ii. Example: Create New Task = Weekly and Repeat Every = 2

i. A new task will be created every 2 weeks

c. Task End – set the date that the recurrence ends. No further tasks will be created after this date

i. The date can be left blank to signify no end date

5. Save the changes

6. For tasks that will block a resources calendar, additional recurring tasks also need to be created

a. Make sure the Resource Role field is NOT populated

i. If the task requires time to be posted - a recurring task will not work to block out a schedule beyond the first week until the resource posts time and completes the task

b. Complete the original task, and the next task will automatically be created with the same task information

c. Repeat as necessary for each day that needs to be blocked.

Important Reminder: Repeating tasks are only created when the current task is completed.

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## Turn Off a Recurring Task

To stop a task from creating a new task upon completion, follow the steps below:

1. Open the task in TaskRay

2. Click the Repeat tab

3. Change Create New Task to 'Does Not Repeat'

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