TaskRay Scheduling and Service Delivery Task Flow and Completion

03/26/2024 3:09 pm EDT

Contents

Purpose

This document walks through the process used in TaskRay for managing scheduling of resources, the management of the tasks by Project Managers and the resources assigned to deliver the service, as well as how to review the weekly project schedule and late task reports.

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Service Delivery Processing

The following walks through the steps Professional Services Resources will use to:

- See the work they are scheduled to deliver and review for issues
- Block time on their schedule

- Communicate schedule issues to PMO
- Communicate information to customers
- Complete assigned work

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Viewing Delivery Schedule

There are two ways to see what you have been scheduled to deliver.

- TaskRay Task List View
- Project Scheduling Report

List View

The TaskRay List View will show your assignment and assignment detail. You can filter and sort based on your needs. You should review your tasks for the upcoming week to ensure you have all the information you need, and all tasks are listed as 'Scheduled"'

To Open your TaskRay List View:

1. 

   Open Salesforce and look for the TaskRay Tasks item in your menu bar

   a. If you do not see this option, locate the pencil at the far right of the menu row and Select Add More Items

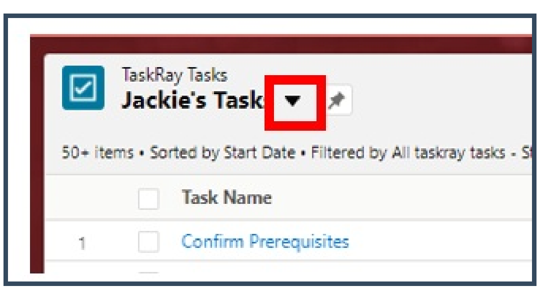
   b. Select All from Available Items and search for TaskRay Tasks

   c. Click it to add, then select Add 1 New Item at bottom of page

2. Navigate to your list

   a. A task list name will show in upper left corner, for Example Jackie's Tasks.

      i. If it does not, click the black down arrow to open the menu to locate your list

      ii. 

      iii. Select the list with your name to open your list

iv. Pin it using the Pin icon

v. It will now always open to your list

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Project Scheduling Report

The Project Scheduling Report is a high-level view of what has been scheduled for each resource each day. The PMO office will use this view to determine load for each day and resource availability.

To Open the Project Scheduling Report:

1. Click the link here Project Scheduling Report
    a. You can also navigate to the Report Menu, click Public Reports, and search by the report name

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Understanding the Project Scheduling Report

The report is designed to summarize all tasks for a given day. It is important to note that the view is NOT like a calendar view and the following should be considered:

- It uses the task start date to drive the information
- It will not display days where no task is scheduled for at list one resource
    - Each task can only span 1 day
    - Multiple day assignments will require multiple tasks
- It does not display holidays or PTO days unless a task is added to designate it as such
- Note the filters used as they may need to be adjusted periodically for dates or to narrow views as necessary

The report will display a summary section:

Report: TaskRay Tasks with Project
Project Scheduling Report
Test Report to show schedule

Total Records 37 | Total Estimated Time (hrs) 50.25

TaskRay Task: Owner Name	Start Date	1/19/2022	1/24/2022	1/25/2022	1/28/2022	2/2/2022	2/3/2022	2/7/2022	2/8/2022	2/9/2022	2/10/2022	2/14/2022	2/15/2022	2/16/2022	2/17/2022	2/22/2022	2/23/2022	2/24/2022	2/28/2022	3/1/2022	Total
James Fraser	Sum of Estimated Time (hrs)	0.00	0.00	0.00	0.50	0.25	6.75	0.00	4.50	5.25	1.00	0.00	0.00	8.00	8.00	0.00	0.00	0.00	0.00	0.00	34.25
	Record Count	0	0	0	1	1	6	1	2	3	1	0	0	1	1	0	0	0	0	0	17
Jason Cogzell	Sum of Estimated Time (hrs)	0.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00
	Record Count	0	1	1	1	1	0	0	0	0	0	1	1	1	1	1	0	1	0	0	10
Philip Ferraro	Sum of Estimated Time (hrs)	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00
	Record Count	1	0	0	0	0	0	0	0	1	1	0	1	0	1	1	1	1	1	1	10
Total	Sum of Estimated Time (hrs)	8.00	0.00	8.00	0.50	0.25	6.75	0.00	4.50	5.25	1.00	0.00	0.00	8.00	8.00	0.00	0.00	0.00	0.00	0.00	50.25
	Record Count	1	1	1	2	2	6	1	2	4	2	1	2	2	3	2	1	2	1	1	37

And a detailed section:

Details (37 Rows) Click an intersection in the table above to filter details.

	Project: Project Name	TaskRay Task: Task Name	Estimated End Date	Estimated Time (hrs)	List	Project Resource Role
1	SO - Sonitrol of Western Kentucky - SedonaOffice Cloud (New): Project	DUo user setup for remaining users	1/28/2022	0.50	Scheduled	-
2	SO - Western Security | SedonaSync: Project	Request SedonaSync Webcaster10 license	2/2/2022	0.25	Scheduled	-
3	SO - Barcom Security - SedonaOffice (NEW): Project	Submit Duo Enrollment - 15 users	2/3/2022	0.25	Scheduled	-
4	SO - Lloyd Security | Sedona-X Mobile: Project	Export FSU Users for Customer	2/3/2022	-	Scheduled	IT Support
5	SO - Lloyd Security | API SedonaWeb2.0: Project	Install API	2/3/2022	4.00	Scheduled	IT Support
6	SO - Lloyd Security | Sedona-X Mobile: Project	Import Spreadsheet	3/3/2022	-	Scheduled	IT Support
7	SO - Lloyd Security | Sedona-X Mobile: Project	License App (4 users)	2/3/2022	2.00	Scheduled	IT Support
8	SO - All Time Detection - Sedona-X Mobile App Migration	Import Spreadsheet - API under ALLTIMEDETECTION	2/3/2022	0.50	Scheduled	IT Support
9	SO - AAA NCNU - SedonaOffice On-Prem Migration: Project	Spin up test and environ and audit	2/7/2022	-	Scheduled	Project Manager
10	SO - Executive Electronics of SW FL - Sedona Barcode: Project	Install Barcode app - 8:30am ET - Rescheduled to 3:30ET	2/8/2022	0.50	Scheduled	Technical Resource

Each column will represent a day where at least one task is scheduled for at least one of the resources listed. Each row will show the load for the resource.

In the Summary section, the top number is the total number of hours scheduled for that day. The bottom number is the total number of tasks to be delivered that day.

TaskRay Task: Owner Name ↑	Start Date →	2/3/2022	2/7/2022	2/8/2
James Fraser	Sum of Estimated Time (hrs) Record Count	6.75 6	0.00 1	
Jason Cogzell	Sum of Estimated Time (hrs) Record Count	0.00 0	0.00 0	
Philip Ferraro	Sum of Estimated Time (hrs) Record Count	0.00 0	0.00 0	
Total	Sum of Estimated Time (hrs) Record Count	6.75 6	0.00 1	

In the example above, on February 3rd, James has 6 tasks for a total of 6.75 hours. On February 7th, he has 1 task, but no hours have been estimated yet. This is a red flag that should be reviewed with the PM for the project.To see the detail of each day, click in the box for that day and the detail records at the bottom of the screen will only show those records:

Report: TaskRay Tasks with Project

Project Scheduling Report

Test Report to show schedule

Total Records	Total Estimated Time (hrs)
30	33.50

TaskRay Task: Owner Name	Start Date	2/3/2022	2/7/2022	2/8/2022	2/9/2022	2/10/2022	2/14/2022	2/15/2022	2/16/2022	2/17/2022	2/22/2022	2/23/2022	2/24/2022	2/28
James Fraser	Sum of Estimated Time (hrs)	6.75	0.00	4.50	5.25	1.00	0.00	0.00	8.00	8.00	0.00	0.00	0.00	
	Record Count	6	1	2	3	1	0	0	1	1	0	0	0	
Jason Cogzell	Sum of Estimated Time (hrs)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	Record Count	0	0	0	0	0	1	1	1	1	1	0	1	
Philip Ferraro	Sum of Estimated Time (hrs)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	Record Count	0	0	0	1	1	0	1	0	1	1	1	1	
Total	Sum of Estimated Time (hrs)	6.75	0.00	4.50	5.25	1.00	0.00	0.00	8.00	8.00	0.00	0.00	0.00	
	Record Count	6	1	2	4	2	1	2	2	3	2	1	2	

Details (6 Rows) TaskRay Task: Owner Name = James Fraser Start Date = 2/3/2022 Clear

	Project: Project Name	TaskRay Task: Task Name	Estimated End Date	Estimated Time (hrs)	List	Project Resource Role
1	SO - Barcom Security - SedonaOffice (NEW): Project	Submit Duo Enrollment - 15 users	2/3/2022	0.25	Scheduled	-
2	SO - Lloyd Security | Sedona-X Mobile: Project	License App (4 users)	2/3/2022	2.00	Scheduled	IT Support
3	SO - All Time Detection - Sedona-X Mobile App Migration	Import Spreadsheet - API under ALLTIMEDETECTION	2/3/2022	0.50	Scheduled	IT Support
4	SO - Lloyd Security | API SedonaWeb2.0: Project	Install API	2/3/2022	4.00	Scheduled	IT Support
5	SO - Lloyd Security | Sedona-X Mobile: Project	Import Spreadsheet	3/3/2022	-	Scheduled	IT Support
6	SO - Lloyd Security | Sedona-X Mobile: Project	Export FSU Users for Customer	2/3/2022	-	Scheduled	IT Support
7				6.75		

The example above shows you've clicked in the box for James on Feb 3rd, and the detail below now shows the 6 tasks and their detail and breakdown of hours. Click on the TaskRay Task Name to see full details for the task.

Important Note: The PM for the project should be notified if there are any issues with the task as it is currently assigned.

To reset the detail at bottom, either click on another box above, or click the Clear in the detail section.

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Blocking Time on a Resource Schedule – Non-Project Related

For the Project Scheduling Report to be accurate, resources will need to enter a task for the time they plan to be unavailable during normal scheduled service delivery hours into a generic project: PS Scheduling Project. This only includes personal use hours you are not going to be able to deliver services, such as:

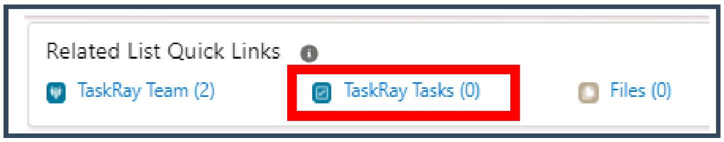
- FTO
- Doctors' appointments
- Personal time away
- Jury Duty

Time to block your schedule for work related items not related to a specific customer project more than 15 minutes in duration should be added for you by the PMO team or your manager. Please contact a resource in that group to block time for work activities of more than 15 minutes. To create recurring tasks to block time for a specific day each week, see Create Recurring Project Tasks

The following steps should be used to block time on your calendar:

1. Open the PS Scheduling Project

2. From the Related List Quick Links box, click TaskRay Tasks



3. Select New from upper right corner

4. Task Name – enter reason for blocking time. Examples:

    a. Full day

        i. PTO

    b. Partial day:

        i. Out of office 8amET – 12pm ET

5. List – change to Completed

6. Start Date – enter the day to block time

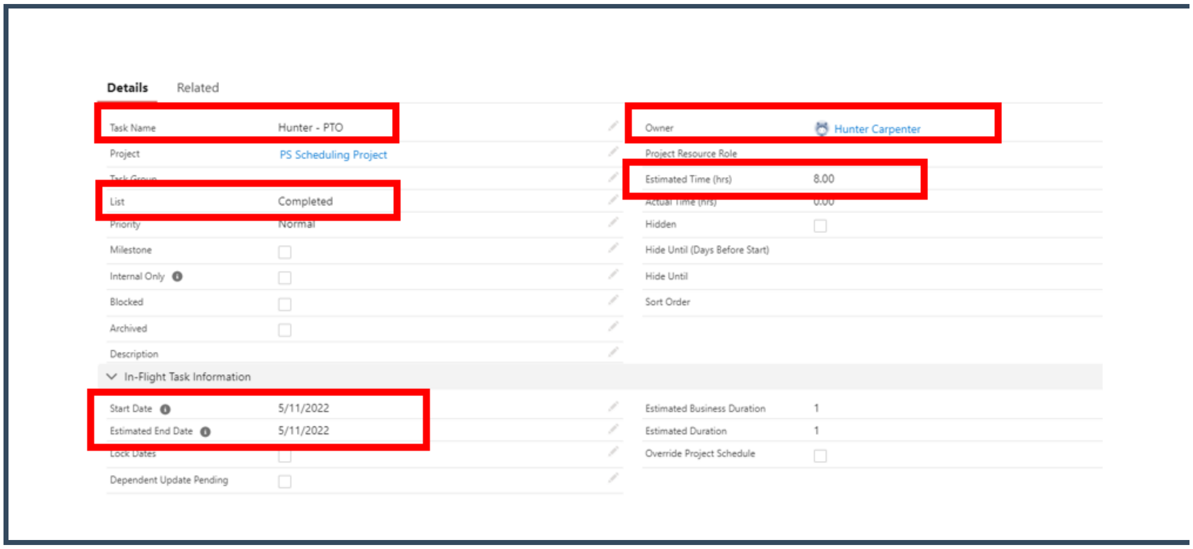
7. End Date - same as Start Date

8. Estimated Time (hrs) field – enter the number of hours to block

    a. Do not enter the time in the In Flight Task Information section under Estimated Business Duration field. It will not show in the scheduling report accurately.

9. Save the task

    a. Example:



10. Confirm Project Planning Report shows the hours

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Reviewing Your Assigned Tasks

It is important that you review your assigned tasks prior to delivery date to ensure you have what you need to deliver the task and the number of hours is right. Any issues with tasks should be reported to the PM or Scheduler for the project to correct immediately.

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Understanding Task Fields

The following fields should be reviewed

1. Details Tab
    a. Task name - does it provide enough information on what needs to be delivered
        i. If the assignment requires the customer to be available, the start time is included in the name using the resource's time zone. The customer time zone and contact information will be in Chatter
    b. Project Name
    c. Start Date – date the task needs to be delivered
        i. Tasks spanning more than one day will have a task for each day, typically labeled Task X Day 1, Task x Day 2, etc

d. Estimated End Date – should be the same as Start Date for Project Scheduling Report to function correctly

e. List - this is the status of the task. It is important to note the status to determine what is firmly scheduled vs a PMO resource working on scheduling and yet to confirm:

   i. Scheduled/In Progress - item confirmed and you should deliver

   ii. Needs to be Scheduled/Stalled - reach out to PM to confirm

   iii. Completed – task is completed and will drop off the Project Scheduling report and your list view unless filter is changed to include completed tasks

      i. If the task is not completed, or needs further work, reach out to the PMO resource for the project for assistance

f. Owner – Resource assigned to deliver the task

g. Estimated Time - the hours you are scheduled to complete the task

   i. If the time is not enough or too much, please reach out to the PMO resource to correct

h. Chatter – will include notes for the task

2. Related Tab – may include attachments for your review

   a. Files - Preinstall checklists, Installation Check lists, etc.

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Updating Task During Service Delivery

All communication regarding the task should be captured on the task. This includes both internal and external communication to the customer. This ensures all resources can quickly ascertain the status of the task at any time.

Internal Communications for Tasks

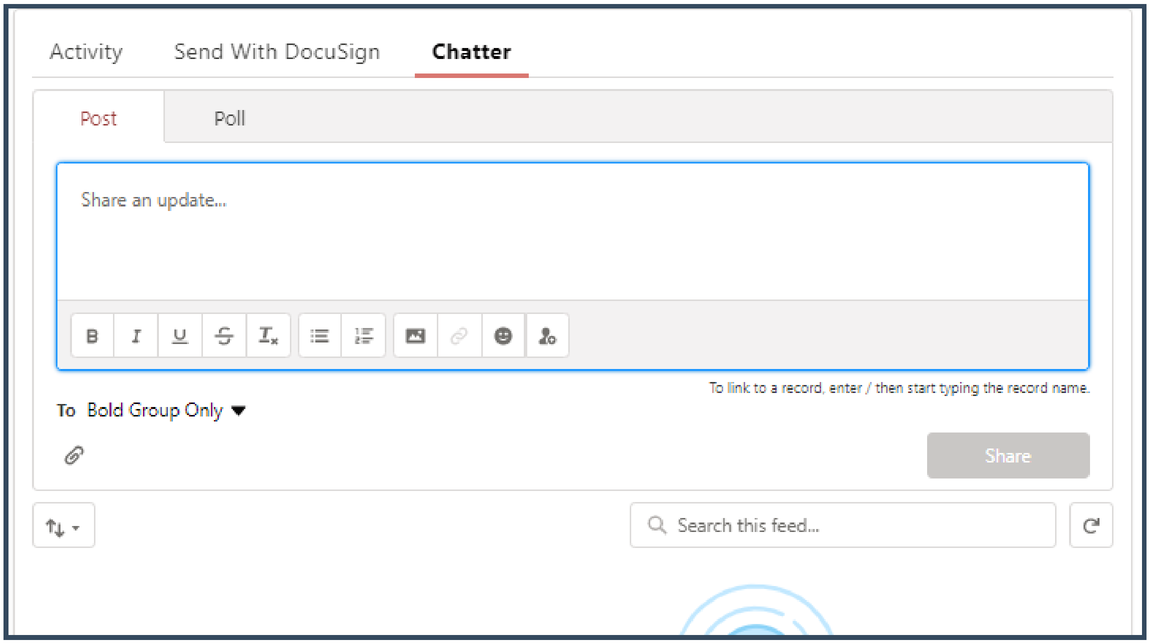
Chatter is where you will add the details that you need to share internally. This keeps a running history of the activity on the task. If your request has not been responded to, you can then IM the resource asking them to review the chatter message and respond. IM should NOT be used in place of the Chatter message. This could include:

- Running notes on status of the task
  - Logged a support request and documenting the request number
  - What has been completed or issue to follow up on

- Asking for assistance from others
    - Task not complete and you need the PM to reschedule the task

Requesting assistance from PMO
To request assistance from the PMO resource responsible for the project or other resources:

1. Under Activity, select the Chatter tab

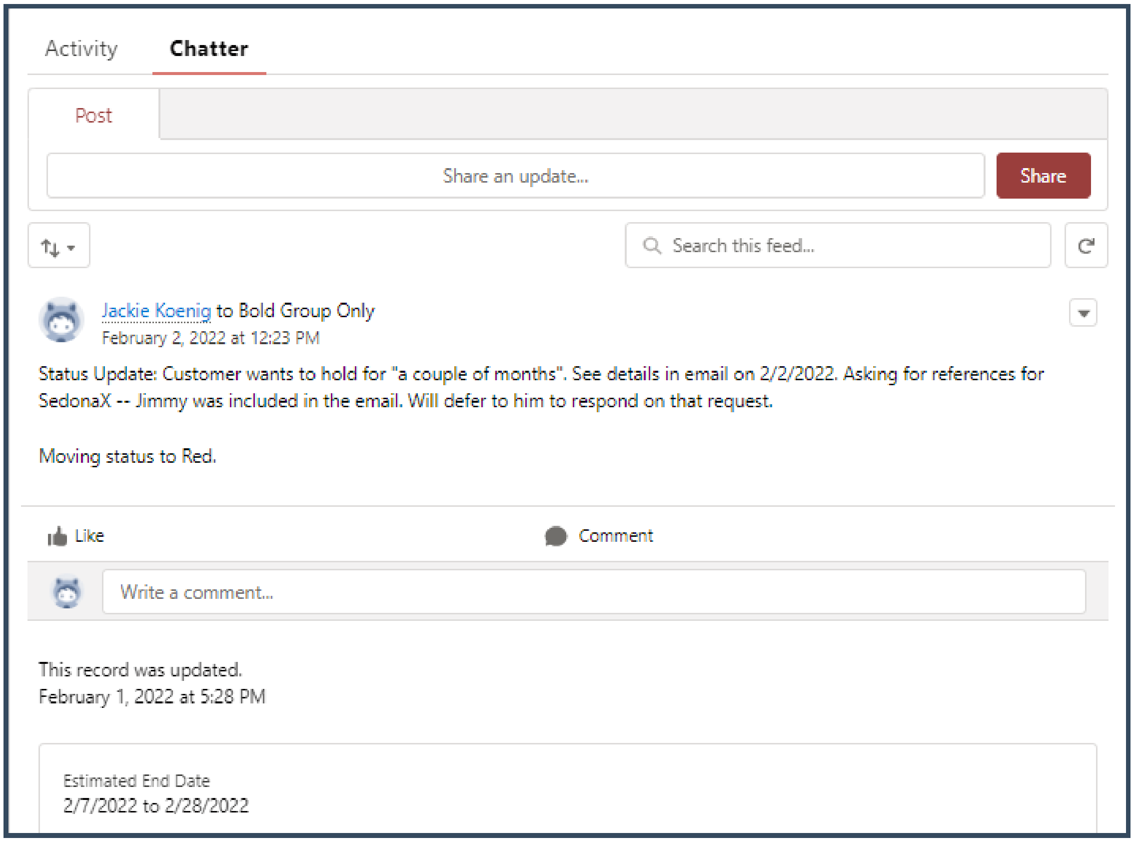


2. Click in the Post box

3. @mention the necessary resource

4. Enter your request and Share

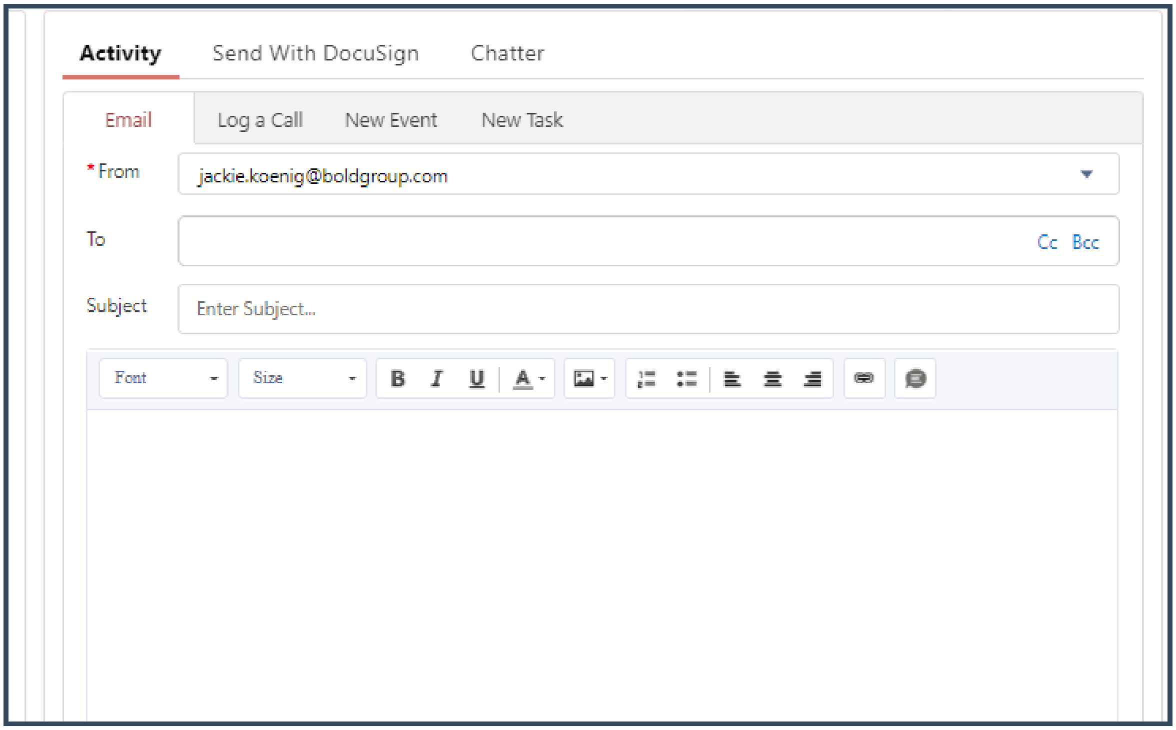
The PMO resource will respond in the same manner. A list of chatter message will appear below the chatter box:



External Communications for Tasks

The Email section on the task is where you should communicate with the customer. It keeps a running history of communications. Returned emails from customer should be uploaded to the TASK as well

1. Under Activity, select the Email tab



2. Populate the TO field with the person that needs to receive the email

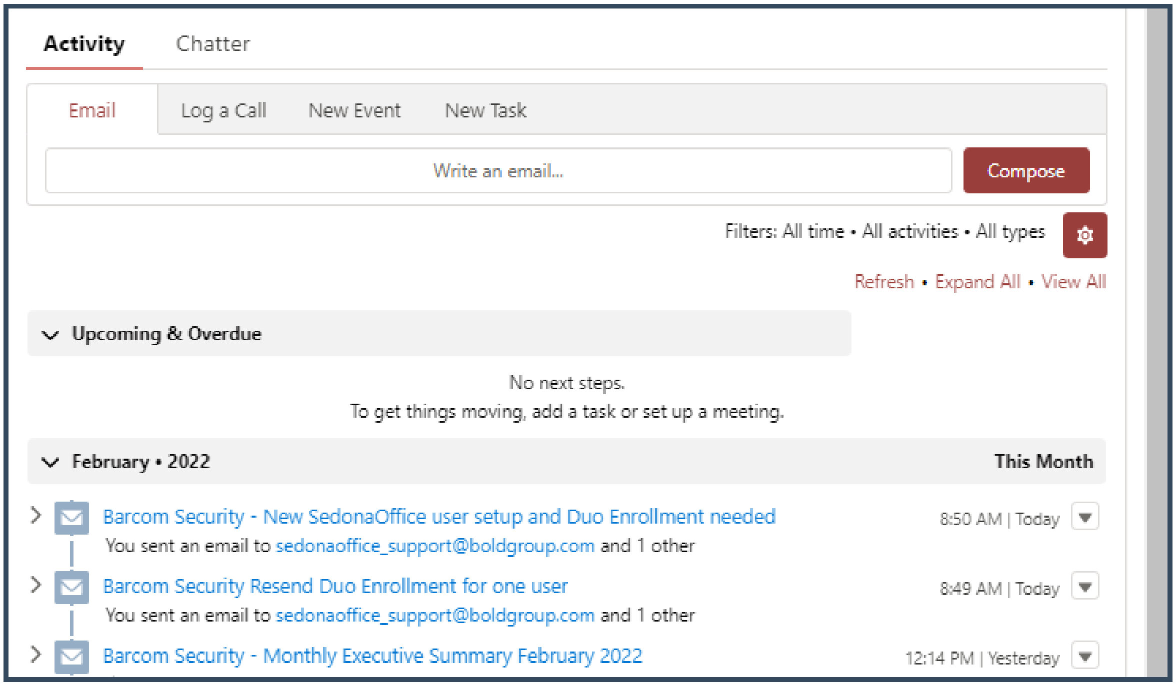
3. You can CC the PMO resource responsible for the project as well

4. Enter a Subject and populate the email details.

5. Attach any documents using icons at bottom of Email screen

6. Send your email.

A copy of your email will display below the Activity Section of the task



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Completing a Task

Immediately after completing the service requested in the task, you will update your notes, ensure all checklists for the customer are linked as well as any other related documents for the task. Then enter your time and mark the task Complete.

Linking Task Documents
To link documents to the task:

1. Click the Related tab for the task

2. Locate the file section

3. Drag your files to the File box

4. Or select Upload Button to select your file

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Entering Task Time

There are a couple of ways to enter time on a task:

- Directly from the task related tab under TaskRay Time section
- Start a timer from the task

Entering Time directly in the Task
From the Task:

1. Select the Related tab

2. Locate the TaskRay Time section and click New

3. Enter yourself in the Owner box

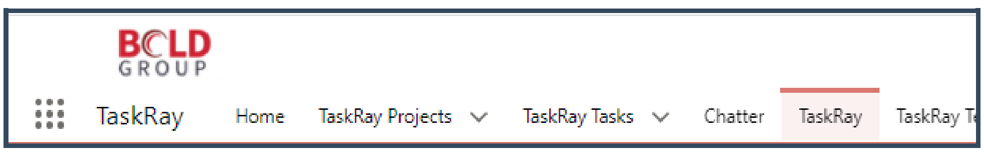
4. Enter the Start Date

5. Ener the Actual Hours

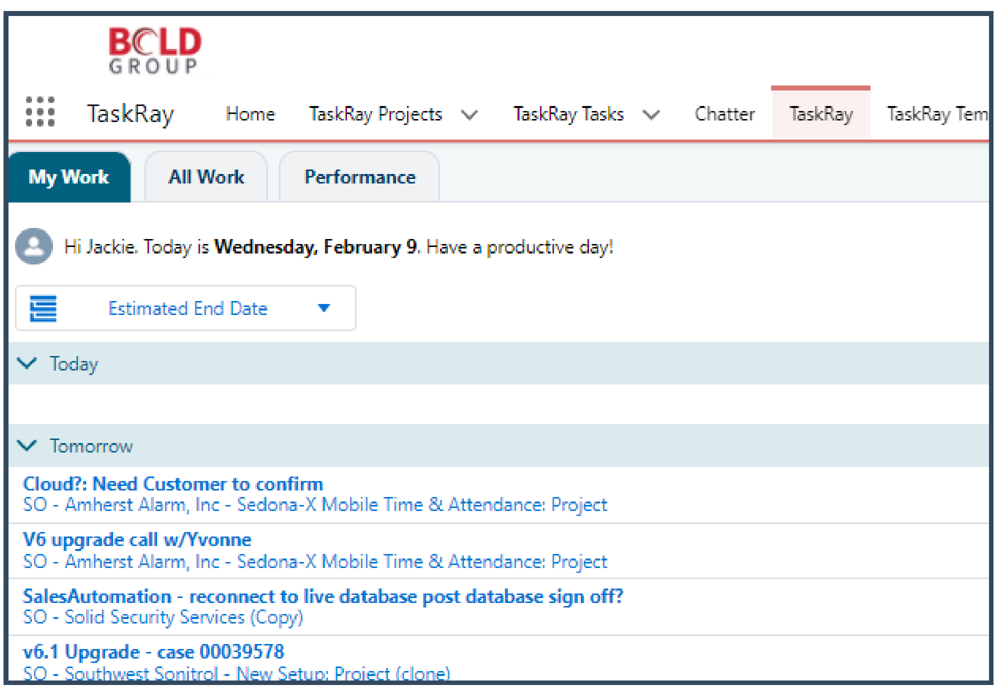
6. Click Save

Entering Time via a Timer
You can start a timer to track your time and create your time record:

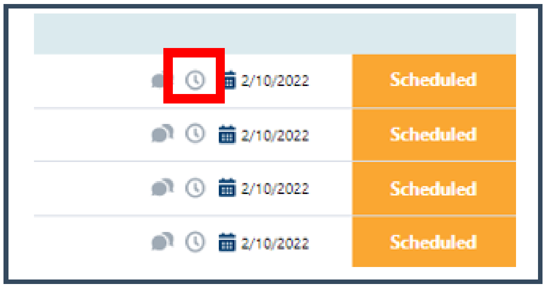
1. From the Menu Bar, select TaskRay



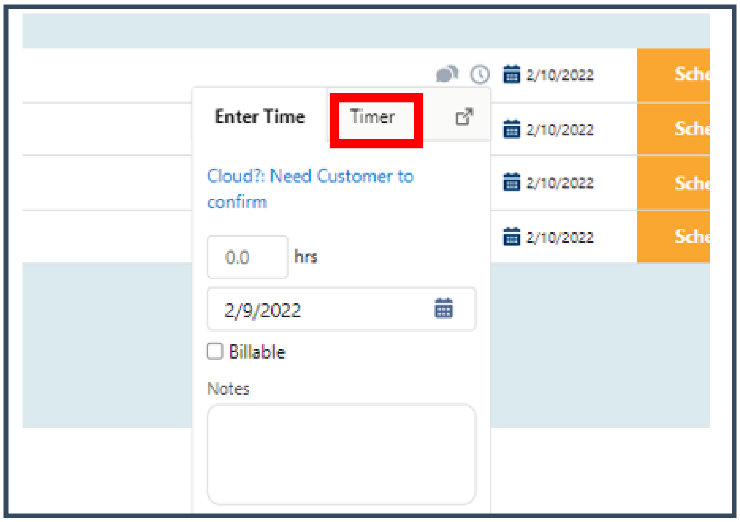
2. Select the My Work tab



3. From the list of tasks, in the row for the task you want to enter time, select the Clock on the far right



4. Click the Timer tab



5. Click Start Timer

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Completing the Task

The final step is to complete the task. This can be done two ways:

1. Change the task List status to Completed by editing the List field

2. Select Completed from the status bar and select Mark list as Complete

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Customer No Show or Cancellation Time Entry

The occasion may arise when a customer does not show up for a scheduled meeting. The meeting will stay open for 15 minutes to wait for the customer. If customer does not attend, they are considered a No Show.
There is not currently a policy in place for customers that cancel prior to a scheduled meeting or day of. A formal cancellation policy is under review.
Follow the steps below for posting time for No Shows:

1. Post 15 minutes of time against the task

2. Update the task Chatter, @mention the PM customer was a no show

3. Complete the task

The PM will reschedule the task with the customer.

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Scheduling with TaskRay

PMO resources will create a task in TaskRay to drive the resource's schedule. Outlook appointments are only necessary for assignments where the customer needs to be present.
All work that is 15 minutes or more in duration requires a task. Anything under 15 minutes can just be absorbed in the daily activity.

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Adding/Updating Task to Schedule

All work over 15 minutes in duration performed by resources will have a task on the related project to deliver the service. The List field determines if the task is ready to deliver or not.

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Holding Time vs Scheduling Time for Resources

To hold time on a resource's calendar, the same steps are followed for firm scheduled time, however, the List field remains at Needs Scheduling. This indicates the customer has yet to confirm the time, or the prerequisites have yet to be completed.

Note in the Chatter field the gating items.
Once the gating items are removed, the List field should be changed to Scheduled. As schedules are reviewed, any task that remains at Needs Scheduling may be subject to rescheduling if not firmed up the week prior to the scheduled date. This ensures that the resources time continues to be fully booked and other projects with urgent needs can be taken care of sooner.

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Scheduling Task Steps - Installation and Data Conversion Resources

The following steps are necessary to hold a time block pending customer confirmation and complete pre-requisites and to confirm the schedule for a task for all resources.

1. Review the Project Scheduling Report for resource availability

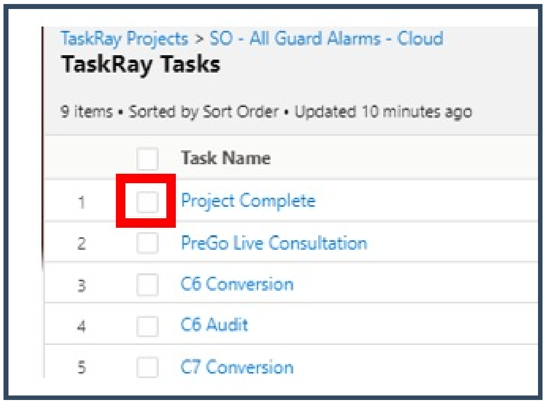
a. Work with any PMO resources directly that may have conflict with what you need to schedule

2. Update the project task
   a. Task Name – Summary of action to be performed
      i. If the task is scheduled for a specific time, enter the start time in the resources time zone with detail in Chatter with customer time zone and contact information
   b. Chatter - Add additional details/instructions in chatter (detail that would have been in outlook appointment previously)
      i. Example: Please reach out to customer X at email.com at phone x to install 8 SedonaX licenses.
   c. Start Date and Estimated End date
      i. Should be the same date
      ii. If spans more than one day, add a second task with Task X Day 1 in Task Name field for first day and Task X Day2 in second task
   d. Estimated Time – the hours you are expect the task to be completed in. This drives the Scheduling report so need to be as accurate as possible
   e. Related Tab
      i. Files – link any files required for the task
         i. Example: Preinstall checklists
   f. List – this field determines if the task is to hold time or is firm scheduled.
      i. Hold time - change to Needs Scheduling
         i. Waiting on customer confirm date
         ii. Waiting on pre-requisites
      ii. Confirmed – change to Scheduled
      iii. Status other than Scheduled indicates to the resource assigned to deliver that the task is not ready to deliver.

g. Save the Task

3. Assign the task – Once you have saved all the details, you need to change the owner of the task to assign it.

    a. From the project task list, click the box to left of one or more tasks that will be assigned to the same resource:



    b. From upper right, click Change owner

    c. Enter the resources name

    d. Uncheck send notification email

    e. Click Submit

    f. Review the Project Scheduling Report to ensure no conflict has been created

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Create an Outlook Appointment for the Task

For any task that requires the customer to be present, PMO will need to create an outlook appointment under the BGPM calendar for the date/time of the appointment to secure the time with the resource assigned and the customer:

1. Create a new Outlook appointment from the Bold Project Management Team calendar

    a. Do not create it from your calendar

2. Title – Customer name and task to be delivered

3. Required Attendees – resource assigned and customer contact

4. Set the start/end time to the CUSTOMERS time zone

5. Appointment Details:

    a. Add a note to the resource. Example:

        i. Hi Resource, please reach out to customer x for x. See details in task: (add link to task)

    b. Add a note to the customer – Customer x – you will need to be available at this time to provide access to your server or to work with the Resource x to complete this task.   Resource X will send a meeting link if one is required. Your application may be

    c. If the application is going to be out of service during the time of the appointment, include a message to remind the customer of this

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Scheduling Task Steps - Application, Training, Accounting Resources

For the consulting resources that will schedule their own time with the customer, the PM will set the desired task start/end dates for the task and inform the resource to schedule the time with the customer by @mentioning the resource in the Chatter section.

The resource will then work with the customer to schedule the time and will update the PM via an @mention in the Chatter section.   The PM can then update the task dates and change the List field to scheduled.

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Weekly Review of Project Tasks

On a weekly basis, the PMO team and services resources will review both tasks that are late and the upcoming week to ensure that all tasks are completed timely, and upcoming tasks have no impediments to deliver.
The senior leader of PMO will drive these meetings.

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Review of Late Tasks

Each task should be closed no later than the end of the day, with time submitted and with information on any impediments and additional time required for rescheduling.   It is important that tasks do not remain open beyond their due date, as budget and follow up items are impacted.

The only exception would be a task that had not started for any reason AND NO TIME HAD BEEN INVESTED to date

To review late tasks:

1. Open the [Project Scheduling Report - Late Tasks]

2. Modify the filters as necessary to ensure only late tasks that have not been completed are shown

3. Discuss as necessary to drive closure, reschedule

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Review of Tasks for Next Week

Each week the PMO team and service delivery resources will review the tasks for the upcoming week to ensure there are no impediments and that the necessary prerequisites are in place.
To review schedule for next week:

1. Open the Project Scheduling Report

2. Modify the filter for start date = Next Week

3. Review all tasks are in 'Scheduled' status

4. For any days with availability, discuss moving in other tasks or shadowing opportunities

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