

Project Team Members and New Project Email Notification

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Purpose

This document explains how Team Members are added to a project or project template and why a notification may be received when a resource is not the owner or resource that will be deployed during the project.

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Automated Email

When a new project is created, everyone listed as a Team Member in the template will be copied to the new project. The new project email automation is set up to notify anyone who is a team member on the new project at the time of project creation.

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Viewing and Adding Project Team Members

Project members are added in several ways:

- Project Templates (via Salesforce directly):
 - Making changes to a project information
 - Add/Delete/Change project tasks
 - Assigning resources to tasks
- Projects:
 - You are assigned as the project owner
 - Assigning a resource to a task
 - Adding team members manually

To view members of a project or project template:

1. Open the project

2. Select the TaskRay Team Assignments link in the Related List Quick Links section

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Deleting Project Members

Before deleting Team Members from a project, ensure no project tasks are assigned to that resource. Team Members can then be deleted from projects and templates with the following steps:

1. Open the project
2. Select the TaskRay Team Assignments link in the Related List Quick Links section
3. Click the drop-down arrow at far left
4. Select Delete

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