

Project - On-Hold

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Purpose

During the lifetime of a project, issues may arise either internally or for the customer that prevent the project from moving forward. This leads to longer time to value for the customer and potential customer satisfaction issues. To help document these delays, the project can now be placed On-Hold with information pertaining to the hold.

This information can then be used to help determine the total number of project delays, the reasons and if they are customer or company issues. Auditing can also be done via reporting where the reason the project was put on hold can be reviewed and resolutions developed to prevent the delay on future projects.

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Project On-Hold Visibility

The following project fields will show when a project is on hold:

Salesforce Project Screen

□

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On-Hold Detail Tab

From the Project screen, locate the On-Hold tab

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The On-Hold Tab displays information regarding any current hold as well as hold history:

Click the On-Hold History Name to open the record for additional detail

□

Note: The hold duration is auto calculated by the start date of the hold. Day 1 is the start date of the hold and will increment each day of the hold including the day it is removed from hold.

Example:

- Jan 1 – Project is placed on hold – duration is 1 day
- Jan 4 – Project is taken off hold – duration is 4 days

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Scheduling Report

The Scheduling Report has been updated to reflect On-Hold projects. The summary now includes a count for tasks related to On-Hold projects:

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The detail has visibility to the On-Hold checkbox:

□

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Individual Resource Task View

Individuals can isolate their tasks by creating their own version of the Scheduling Report:

1. Open the report [Schedule - User Template](#)
2. Click Edit
3. Click the drop down next to Save and select SAVE AS
 - a. Important Note: DO NOT make any changes to the report or click Properties and save. Doing so will overwrite the master template for this report.
4. Confirm the dialog box that opens says 'Save Report As'
5. Change the report name to Schedule – xxxxxx replacing the x's with your name
6. Change the filter for Task Owner
 1. Add your name
 2. Remove Jackie Koenig
 3. Suggest leaving TaskRay Unassigned to show all available work days
7. Save
8. Save your report as a favorite

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Placing a Project On-Hold

A project should be placed on hold ONLY if all parts of the project cannot move forward. Follow these steps to place a project on hold:

1. From the Project view, click the On-Hold tab
2. From the Active On-Hold section, click New
3. Enter the On-Hold Date
4. Select the On Hold Reason
5. Enter Notes to fully explain the reason the project is on hold and any pertinent information related to the hold.
 - a. Begin with the date of the note and initials of resource adding the note
 - b. Ongoing Notes can be added during hold duration at the top, with resource adding date and initials
6. Save the record

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Removing a Project from On-Hold

Follow these steps to remove a project on hold:

1. From the Project view, click the On-Hold tab
2. From the Active On-Hold section, click the active record
3. Enter the Resume Date
4. Enter Notes to fully explain the reason the project is resuming
 - a. Begin with the date of the note and initials of resource adding the note
5. Save the record
6. Return to the On-Hold tab and confirm the On-Hold checkbox is no longer checked
 - a. The hold will still show as active
7. Remove the On-Hold date from this view
 - a. The hold record will no longer show as active and will show in the hold history

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