

PROJECTFORCE USER GUIDE

Created by
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Project Overview

In this page you have three tabs:

1. In My Projects you can see all the projects in which you are a member.
2. In New Projects you can see all the new projects except the ones which are private.
3. In All Projects you can see all the projects except the ones which are private.

In the left of the screen there are two lists:

4. In My Upcoming Tasks you see the 5 tasks that were most recently created.
5. In My Upcoming Milestones you see the 5 milestones that were most recently created.

In the top right of the screen there is a task finder:

6. Enter the ID of a given task or milestone and the finder will redirect you to a task detail page.

The screenshot shows the Salesforce Project Overview page. At the top, there is a navigation bar with links for Setup, System Log, Help, and Logout, along with the force.com logo and a Project dropdown menu. Below this is a sub-navigation bar with Home and Projects tabs. The main content area is divided into a left sidebar and a main panel. The left sidebar contains sections for My Upcoming Tasks (with a '4' callout) and My Upcoming Milestones (with a '5' callout). The main panel has tabs for My Projects (with a '1' callout), New Projects (with a '2' callout), and All Projects (with a '3' callout). A search bar with a 'Find Projects' button and a Search button is located above the tabs. To the right of the search bar is a Task ID input field (with a '6' callout) and a Go button. Below the tabs, there is a filter section with an 'ALL' button and a list of letters. A project card for 'Building a hospital' is visible, showing 3 Tasks, 1 Milestones, and 1 Members. At the bottom, there is a footer with copyright information and links for Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

Create Project

- In the Create New Project page you will be able to choose the name, description and priority of the new project.
- To save the project, click on Save button.
- If you want to create one project, and then create another project, click on Save & New button.
- If you want to cancel the creation of the project, click on Cancel button.

Access

In Project there are three types of projects: Open, Closed and Private. In each type of project there are three profiles: Public, Member and Admin. Member users can do anything Public users can. Admin users can do anything Member or Public users can. In every project anyone can delete or edit the project, tasks and milestones he creates.

The rules for the different type of projects are the following:

Open projects

Anyone can join the project. Anyone can view the tasks and milestones. Members can create tasks and milestones. Admins can create projects.

Closed projects

To join the project an admin must invite you. Anyone can view the projects with its task and milestones. Members can create tasks and milestones. Admins can create projects.

Private project

To join the project an admin must invite you Members can create and view tasks and milestones. Admins can create projects.

The screenshot shows the 'Project Edit' form in the force.com application. The interface includes a top navigation bar with 'force.com' logo, 'Setup', 'System Log', 'Help', 'Logout', and a 'Project' dropdown menu. Below the navigation bar is a 'Home' button and a 'Projects' tab. The main content area is titled 'Project Edit' and 'New Project'. It features a search bar on the left with a 'Go!' button and a 'Limit to items I own' checkbox. The main form has two sections: 'Project Information' and 'Project Access'. The 'Project Information' section includes fields for 'Project Name', 'Description', 'Priority' (dropdown), 'Display Duration' (dropdown), 'Days in a work week' (dropdown), and 'Working hours' (text input). The 'Project Access' section includes checkboxes for 'Allow customer portal users' and 'Allow partner portal users', and a dropdown for 'Access'. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons. A red exclamation mark icon indicates required information.

[Home](#) | [Projects](#) | [All Tabs](#)

Search

Search All

Go!

☐ Limit to items I own

[Advanced Search...](#)

Create New...

Recent Items

No records to display

[Recycle Bin](#)

Project Edit
New Project

[Help for this Page](#)

Project Edit

Save

Save & New

Cancel

Project Information

! = Required Information

Project Name Building a hospital

Write the Name of the new Project.

Description In this project

Write the Description of the new Project

Priority High

Select the priority of the Project

Display Duration Days

- High

- Medium

- Low

Days in a work week 5

Working hours 8

Select the Duration. (Not editable)
The viewing of the future tasks can be displayed in days or hours.

Write the working hours per working day. (Not editable)
(Values between 1 and 24)

Project Access

Allow customer portal users ☐

Allow partner portal users ☐

Access Open

Select the Days in a work week. (Not editable)
(These are the days of the week on which work on the project)
1 - Monday
2 - Monday - Tuesday
3 - Monday - Tuesday - Wednesday
...

Select the Access to the new Project

- Open

- Closed

- Private

Save

Save & New

Cancel

[Home](#) | [Projects](#) | [All Tabs](#)

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Project Detail

- From this page you can edit, delete, unjoin and add an image to the project.
- Also you can add tasks, milestones and attachments.
- To change the image of the project click on Change Image link.
- To see the detail of a created task click on the name of the task.

Create a new Task

The screenshot shows the Salesforce Project Detail page for a project named "Building a hospital". The page layout includes a top navigation bar with "force.com" and "100" branding, and a sidebar with navigation links like "Home", "Projects", "Project Quick Links", "Project Subscriptions", and "Project Members". The main content area displays project details such as Name, Description, Image, Priority, and Duration. A yellow callout box with a red arrow points to the "New Task" link in the "Project Quick Links" sidebar, with the text "Click here to create a new Task. (An overlay shows up)". Below the project details, there are sections for "All Tasks", "Milestones", and "Attachments". Each section has a "No [X]s" message and a "Create New [X]" button. A second yellow callout box with a red arrow points to the "Create New Task" button, with the text "Click here to create a new Task (An overlay shows up)". The footer contains copyright information and links to "Privacy Statement", "Security Statement", "Terms of Use", and "508 Compliance".

force.com 100

Setup · System Log · Help · Logout

force.com apps Project

Home Projects

Project Detail

Find Tasks Search TaskID: Go

Building a hospital > Detail

Project Quick Links

- New Task
- New Milestone
- Timeline
- Task List
- Member List

Project Subscriptions

Manage Subscriptions

Project Members

New | See More»

Jose Iglesias

Project Name: Building a hospital

Description: In this project

Image: [Change Image](#)

Priority: High

Display Duration: Days

Days in a work week: 5

Working hours: 8

Allow customer portal users: ☐

Allow partner portal users: ☐

Access: Open

Created By: Jose Iglesias, 10/19/2009 6:09 A.M.

Last Modified By: Jose Iglesias, 10/19/2009 6:26 A.M.

All Tasks

Click here to create a new Task (An overlay shows up)

No Tasks

Create New Task

Milestones

No Milestones

Create New Milestone

Attachments

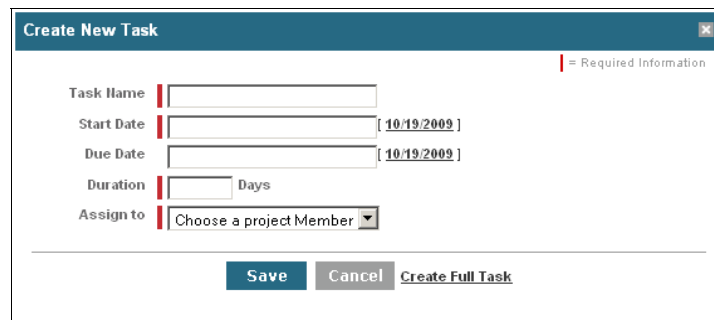
No Attachments Yet

Attach a new file

Home | Projects | All Tabs

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Create new Task (Overlay)



Create New Task [X]

[Red bar] = Required Information

Task Name [Red bar]

Start Date [Red bar]

Due Date [Red bar]

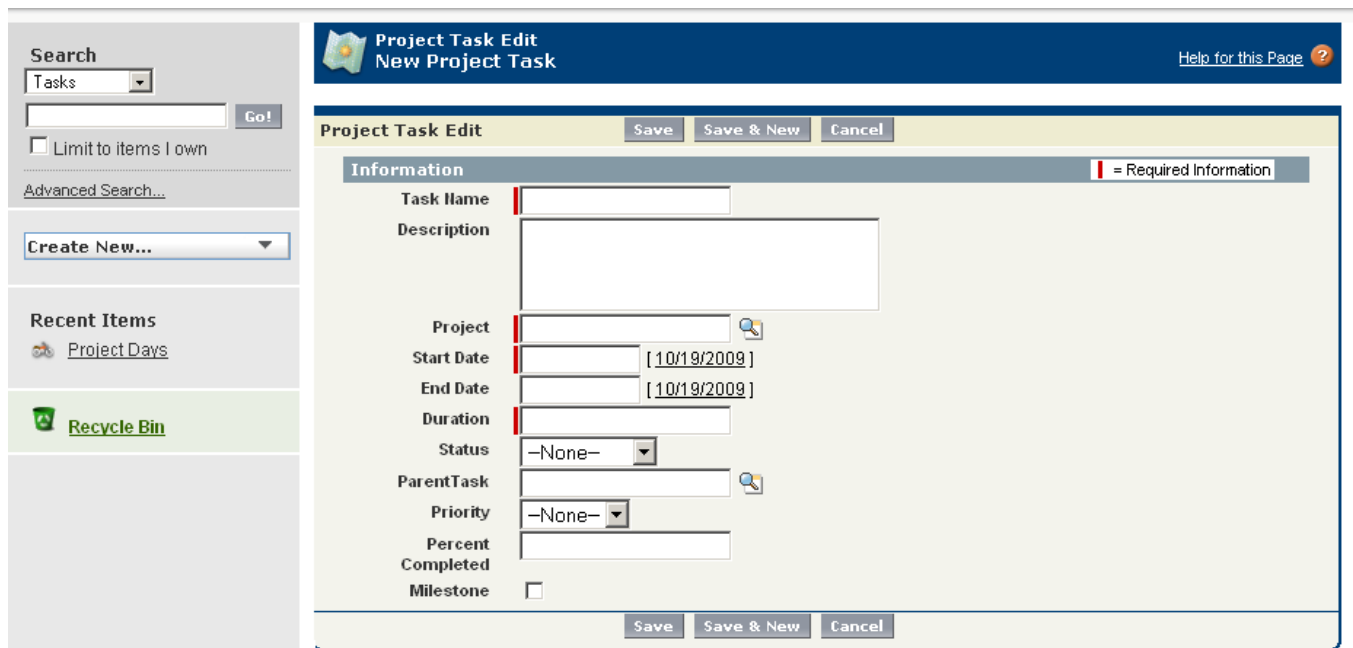
Duration [Red bar] Days

Assign to [Red bar]

[Create Full Task](#)

If you click on Create Full Task link, appears a page to create a task with more information.

Create full Task



Project Task Edit [Help for this Page](#) [?]

Project Task Edit

Information [Red bar] = Required Information

Task Name [Red bar]

Description

Project [Red bar] [Magnifying Glass]

Start Date [Red bar]

End Date [Red bar]

Duration [Red bar]

Status [Red bar]

ParentTask [Red bar] [Magnifying Glass]

Priority [Red bar]

Percent Completed

Milestone ☐

Search
Tasks [v]

☐ Limit to items I own
[Advanced Search...](#)
 [v]

Recent Items
Project Days
Recycle Bin

Projectforce
Setup · System Log · Help · Logout
force.com apps
Project

Home Projects

Search
Tasks
Go!
Limit to items I own
Advanced Search...
Create New...

Select the Status of the Task

- Open
- Assigned
- In Progress
- Resolved
- Reopened
- Closed

Select the priority of the Task:

- High
- Medium
- Low

Project Task Edit
New Project Task
Help for this Page

Project Task Edit
Save Save & New Cancel

Information
= Required Information

Task Name
Preparing the ground
Write the name of the new Task

Description
To prepare the ground
Write the description of the new Task

Project
Building a hospital
Select the Project where you are.

Start Date
7/14/2009 [10/19/2009]
End Date
9/15/2009 [10/19/2009]
Select the Start and End date of the task

Duration
30
Select the Duration of the Task. (if select any End date, the duration is recalculated)

Status
Open

ParentTask
Select a Parent Task. (This task is automatically transformed into a Child Task)

Priority
Medium

Percent Completed

Milestone
Converts the Task in Milestone

Save Save & New Cancel

Enter the percent completed of the Task

Home Projects All Tabs

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Create a new Milestone

The screenshot shows the Salesforce Project Detail page for a project named "Building a hospital". The page has a sidebar with navigation links: "Project Quick Links" (New Task, New Milestone, Timeline, Task List, Member List), "Project Subscriptions" (Manage Subscriptions), and "Project Members" (Jose Iglesias). The main content area displays project details: Project Name (Building a hospital), Description (In this project), Image (with a "Change Image" link), Priority (High), Display Duration (Days), Days in a work week (5), Working hours (8), Allow customer portal users (checkbox), Allow partner portal users (checkbox), Access (Open), Created By (Jose Iglesias, 10/19/2009 6:09 A.M.), and Last Modified By (Jose Iglesias, 10/19/2009 6:26 A.M.). Below the details are sections for "All Tasks", "Milestones", and "Attachments". The "Milestones" section shows "No Milestones" and a "Create New Milestone" link. A yellow callout box with a red arrow points to the "New Milestone" link in the sidebar and the "Create New Milestone" link in the Milestones section, containing the text: "Click here to create a new Milestone. (An overlay shows up)".

Create new Milestone (Overlay)

The screenshot shows the "Create New Milestone" overlay form. It has a title bar with a close button. The form contains the following fields: "Milestone Name" (text input), "Start Date" (text input with a date picker showing 10/19/2009), and "Assign to" (dropdown menu showing "Choose a project Member"). A red vertical bar next to the "Milestone Name" field indicates it is a required field. A legend at the top right states "Required Information". At the bottom, there are three buttons: "Save", "Cancel", and "Create Full Task".

- The other way to create Milestones is creating a Full Task and checking "Milestone"

Other links

The screenshot shows the Salesforce Project Detail page for a project named "Building a hospital". The page includes a sidebar with "Project Quick Links" (New Task, New Milestone, Timeline, Task List, Member List), "Project Subscriptions" (Manage Subscriptions), and "Project Members" (Jose Iglesias). The main content area displays project details such as Name, Description, Image, Priority, Display Duration, Days in a work week, Working hours, and a list of members. Below this, there are sections for "All Tasks" (listing tasks like "Preparing the ground" and "Elevation of the structure"), "Milestones" (listing "Finish the building"), and "Attachments" (listing "Hospital plans.jpg"). Annotations with red arrows point to various elements: "Click on these buttons to Delete or Edit the Project." points to the Delete, Edit, and Unjoin buttons; "Click here to Unjoin of the Project. (Not will be more a Member of the Project)" points to the Unjoin button; "Click here to go to Task Details" points to the "Preparing the ground" task; "Click here to go to Milestone Details" points to the "Finish the building" milestone; "Click here to download attached file" points to the "Hospital plans.jpg" attachment; "Click here to add new attachment" points to the "New Attachment" button; "Click here to go to Timeline and see all the tasks with a dynamic interface." points to the "Timeline" link in the sidebar; "Click here to go to Task List. In these page appears a list of all tasks" points to the "Task List" link in the sidebar; "Click here to see the list of all Members of the Project." points to the "Member List" link in the sidebar; "Configure sending e-mails when there are changes on the Project" points to the "Manage Subscriptions" link in the sidebar; and "Click here to Add a new member of the Project" points to the "New" button in the "Project Members" section.

force.com 1700 Setup System Log Help Logout force.com apps Project

Home Projects

Project Project Detail Find Tasks Search TaskID: Go

Building a hospital > Detail

Click on these buttons to Delete or Edit the Project. Delete Edit Unjoin Click here to Unjoin of the Project. (Not will be more a Member of the Project)

Project Quick Links

- New Task
- New Milestone
- Timeline
- Task List
- Member List

Project Subscriptions

- Manage Subscriptions

Project Members

New | See More»

Jose Iglesias

Project Name: Building a hospital

Description: In this project

Image: Change Image

Priority: High

Display Duration: Days

Days in a work week: 5

Working hours: 8

Allow customer portal users: ☐

Allow partner portal users: ☐

Access: Open

Created By: Jose Iglesias, 10/19/2009 6:09 AM

Last Modified By: Jose Iglesias, 10/19/2009 6:26 AM

All Tasks New | View All Tasks» | Timeline | See More»

Task Information	Assignee	Priority	Status	Percent Complete
Preparing the ground 76 days late, due 8/4/2009	Jose Iglesias	Medium	Open	0 %
Elevation of the structure Due 11/17/2009	Jose Iglesias	Medium	Open	0 %

Milestones New | Timeline | See More»

Milestone Information	Assignee	Date
Finish the building	Jose Iglesias	

Attachments New Attachment

Name	Weight(Kb)	Created Date	Created By
Hospital plans.jpg	36,330	10/19/2009 6:49 AM	Jose Iglesias

Click here to download attached file

Click here to add new attachment

Home | Projects | All Tabs

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Links of the Widgets

The diagram illustrates the links from the Project Widgets to their respective actions:

- Project Quick Links:**
 - Timeline: Click here to go to Timeline and see all the tasks with a dynamic interface.
 - Task List: Click here to go to Task List. In these page appears a list of all tasks
 - Member List: Click here to see the list of all Members of the Project.
- Project Subscriptions:**
 - Manage Subscriptions: Configure sending e-mails when there are changes on the Project
- Project Members:**
 - New: Click here to Add a new member of the Project

Task Detail

From here you can see all the fields, edit, mark complete and delete the task or milestone.

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Project

Home

Projects

Project Building a...

Find Tasks

Search

Task ID: Go

Building a hospital > Tasks > Preparing the ground


Edit Task

Mark Complete

Delete

Project Members

New | See More»

 Jose Iglesias

Id #6959

Task Name Preparing the ground

Description Get all materials to prepare the ground.

Project **Building a hospital**

Start Date 7/22/2009

End Date 8/4/2009

Duration 10.0

Status Open

Parent Task

Priority Medium


Percent Completed 50.0%

Milestone ☐

Created By Jose Iglesias, 10/19/2009 6:46 AM

Last Modified By Jose Iglesias, 10/20/2009 5:13 AM

Status 50%

Files  Add New Attachment

Assigned To Jose Iglesias 0%

Comments

Save Comment

Edit Task

Mark Complete

Delete

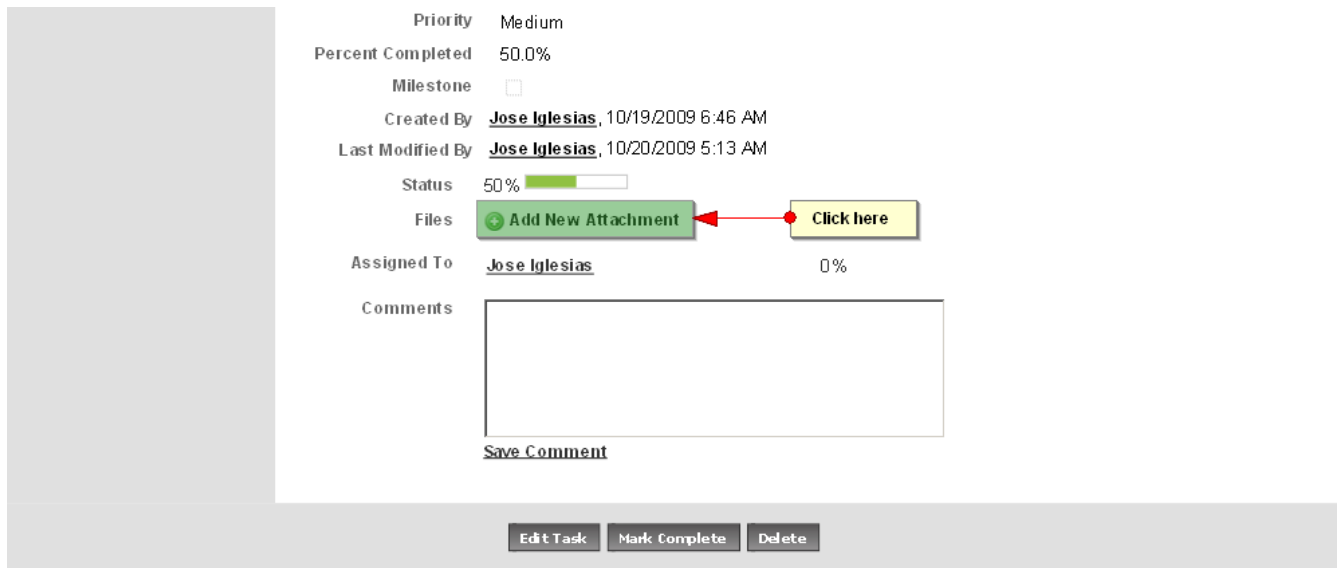
[Home](#) | [Projects](#) | [All Tabs](#)

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Add attachment files

You can add files to the task. To do this make the following steps.

1. Click on Add New Attachment.

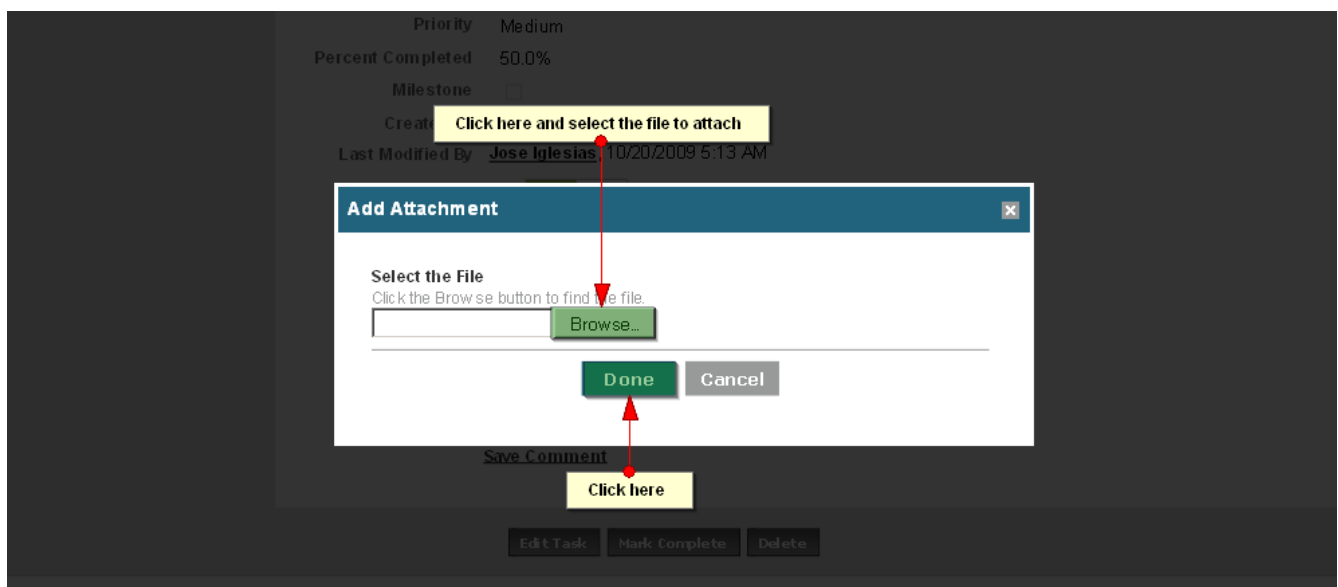


The screenshot shows a task details form with the following fields and values:

- Priority: Medium
- Percent Completed: 50.0%
- Milestone: ☐
- Created By: [Jose Iglesias](#), 10/19/2009 6:46 AM
- Last Modified By: [Jose Iglesias](#), 10/20/2009 5:13 AM
- Status: 50%
- Files: [Add New Attachment](#) (highlighted with a red arrow and a 'Click here' label)
- Assigned To: [Jose Iglesias](#) 0%
- Comments:

At the bottom of the form, there are three buttons: [Edit Task](#), [Mark Complete](#), and [Delete](#).

2. Click on Browse button and select the file.



The screenshot shows the 'Add Attachment' dialog box with the following fields and values:

- Priority: Medium
- Percent Completed: 50.0%
- Milestone: ☐
- Created By: [Jose Iglesias](#), 10/19/2009 6:46 AM
- Last Modified By: [Jose Iglesias](#), 10/20/2009 5:13 AM
- Status: 50%
- Files: [Add New Attachment](#) (highlighted with a red arrow and a 'Click here' label)
- Assigned To: [Jose Iglesias](#) 0%
- Comments:

The 'Add Attachment' dialog box is open, showing the 'Select the File' section with the instruction 'Click the Browse button to find the file.' The 'Browse...' button is highlighted with a red arrow and a 'Click here' label. The dialog box also has 'Done' and 'Cancel' buttons.

The file is added in the task or milestone.

Add Assignees

You can add Assignees to the task or milestone. To do this make the following steps.

1. Click on New Assegnee link (Assignees can only be members of the project).

The screenshot shows a task details page with the following fields: ParentTask, Priority (Medium), Percent Completed (50.0%), Milestone (checkbox), Created By (Jose Iglesias, 10/19/2009 6:46 AM), Last Modified By (Jose Iglesias, 10/20/2009 5:13 AM), Status (50% progress bar), Files (Add New Attachment), Assigned To (New assignee button, Jose Iglesias, 0%), and Comments (Save Comment button). A red arrow points from a yellow callout box labeled 'Click here' to the 'New assignee' button.

2. Select a member and a percent dedicated, and click on Save button. If you want to add more than one assignee click on Save and New button.

The screenshot shows a dialog box titled 'Add new assignee to Preparing the ground' with fields for Member (User1 Standar) and Percent dedicated (35). A red arrow points from a yellow callout box labeled 'Select User' to the Member dropdown. Another red arrow points from a yellow callout box labeled 'Select Percent dedicated' to the Percent dedicated dropdown. A third red arrow points from a yellow callout box labeled 'Click here' to the 'Save' button. The dialog also includes 'Save and new' and 'Cancel' buttons.

The assignee is added in the task or milestone.

Click on Remove button to delete an Assignee.

The screenshot shows the 'Assigned To' section with two assignees: Jose Iglesias (0%) and User1 Standar (35%). Each has a 'Remove' button. A red arrow points from a yellow callout box labeled 'Click here to remove' to the 'Remove' button for User1 Standar.

Enter a Comment

To enter a comment for the task make the following steps.

1. Write your comment in the text field next to "Comments" text. Then click on Save Comment button.

The screenshot shows a task management interface with the following elements:

- Status:** 50% (progress bar)
- Files:** + Add New Attachment
- Assigned To:** + New assignee
 - [Jose Iglesias](#) 0% [Remove](#)
 - [User1 Standar](#) 35% [Remove](#)
- Comments:** A text box containing "This is a comment." and a [Save Comment](#) button.

Red arrows point from callout boxes to the text box and the [Save Comment](#) button. The callout boxes contain the text "Write your comment of the task here" and "Click here".

At the bottom, there are buttons: [Edit Task](#), [Mark Complete](#), and [Delete](#).

Your comment will be displayed below the text box.

For delete your comment click on "Delete Comment" link next to the comment you want to remove.

The screenshot shows the same task management interface as the previous one, but with the following changes:

- The [Save Comment](#) button is now disabled.
- A new comment is displayed below the text box, with the text "Created By Jose Iglesias, Tue Oct 20 12:58:03 GMT 2009" and "This is a comment." A [Delete Comment](#) button is next to it.

Red arrows point from callout boxes to the newly added comment and the [Delete Comment](#) button. The callout boxes contain the text "This is the newly added comment" and "Click here to delete the comment".

At the bottom, there are buttons: [Edit Task](#), [Mark Complete](#), and [Delete](#).

Mark complete a task/milestone

The screenshot shows the ProjectForce interface for a project named "Building a hospital". The breadcrumb trail is "Building a hospital > Tasks > Preparing the ground". The task details are as follows:

Field	Value
Id	#6959
Task Name	Preparing the ground
Description	Get all materials to prepare the ground.
Project	Building a hospital
Start Date	7/22/2009
End Date	8/4/2009
Duration	10.0
Status	Open
ParentTask	
Priority	Medium
Percent Completed	50.0%
Milestone	<input type="checkbox"/>
Created By	Jose Iglesias, 10/19/2009 6:46 AM
Last Modified By	Jose Iglesias, 10/20/2009 5:13 AM
Status	50% <div></div>
Files	Add New Attachment
Assigned To	New assignee
	Jose Iglesias 0% Remove
	User1 Standar 35% Remove

A red arrow points to the "Mark Complete" button, which is highlighted in green. A yellow callout box next to the arrow says "Click here to mark complete this task".

The screenshot shows the same ProjectForce interface, but the task "Preparing the ground" is now marked as complete. The status bar at the top now only contains "Edit Task" and "Delete" buttons. The task details are as follows:

Field	Value
Id	#6959
Task Name	Preparing the ground
Description	Get all materials to prepare the ground.
Project	Building a hospital
Start Date	7/22/2009
End Date	8/4/2009
Duration	10.0
Status	Open
ParentTask	
Priority	Medium
Percent Completed	50.0%
Milestone	<input type="checkbox"/>
Created By	Jose Iglesias, 10/19/2009 6:46 AM
Last Modified By	Jose Iglesias, 10/20/2009 5:13 AM
Status	100% <div></div>
Files	Add New Attachment
Assigned To	New assignee
	Jose Iglesias 0% Remove
	User1 Standar 35% Remove

A green banner message at the top of the task details area states: "This task has been marked complete".

Tasks and Milestones List

From here you can edit, delete and enter into the different tasks and milestones.

The screenshot shows the 'Project Tasks & Milestones' page in Salesforce. The page has a header with the 'force.com' logo, navigation links (Home, Projects), and a search bar. Below the header, there's a section for 'Building a hospital > Tasks and Milestones'. This section contains several buttons: 'New Task', 'New Milestone', 'Mark Complete', 'Timeline', and 'Delete'. There are also callout boxes with instructions: 'Click here to create a new Task or Milestone (An overlay shows up)' pointing to the 'New Task' button, 'When at least one Task is selected and click on this button, this task/s are deleted with all her children. If a Parent is deleted, all of your children are deleted too.' pointing to the 'Delete' button, and 'Click here to edit or delete a task' pointing to the 'Edit' button in the table. A 'Go to Timeline' button is also present. Below the buttons is a table with columns: Action, ID, Priority, Name, Assigned to, % Completed, Duration (Days), and Due date. The table contains three rows of tasks. The first row has an 'Edit' button highlighted. The second row has a 'Mark Complete' button highlighted. The third row has a 'Delete' button highlighted. A 'Quick filter' dropdown is set to 'All Tasks'. At the bottom of the page, there are links for 'Home', 'Projects', and 'All Tabs', and a copyright notice for 2000-2009 salesforce.com, inc.

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Setup · System Log · Help · Logout

force.com apps Project

Home Projects

Project Tasks & Milestones

Find Tasks Search Task ID: Go

Building a hospital > Tasks and Milestones

Click here to create a new Task or Milestone (An overlay shows up)

When at least one Task is selected and click on this button, this task/s are deleted with all her children. If a Parent is deleted, all of your children are deleted too.

Click here to edit or delete a task

New Task New Milestone Mark Complete Timeline Delete

When at least one Task is selected and click on this button, these task/s are marked complete.

Go to Timeline

Quick filter: All Tasks

Export to CSV

Action	ID	Priority	Name	Assigned to	% Completed	Duration (Days)	Due date
<input type="checkbox"/> Edit Del	#6960	↓	Finish the building	Jose Iglesias	0%	1.0	
<input type="checkbox"/> Edit Del	#6959	↓	Preparing the ground	Jose Iglesias	0%	10.0	8/4/2009 76 day late
<input type="checkbox"/> Edit Del	#6958	↓	Elevation of the structure	Jose Iglesias	0%	72.0	11/17/2009

New Task New Milestone Mark Complete Timeline Delete

Home | Projects | All Tabs

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Find Projects

From Project Overview page you can search for the projects.

To locate a project must have at least one project that contains the word of the search.

The screenshot shows the Project Overview page in Salesforce ProjectForce. The top navigation bar includes links for Setup, System Log, Help, and Logout. The main header features the force.com logo and a search bar with the text "Write a part of the project name you want to find here". Below the header, the left sidebar contains sections for "My Upcoming Tasks" (with a task "Preparing the ground" due 76 days late) and "My Upcoming Milestones" (with a milestone "Finish the building" due in 358 days). The main content area displays a list of projects, with the first project being "Building a hospital" (3 Tasks, 1 Milestones, 1 Members). The search bar at the top of the main content area has "hospital" entered, and the "Find Projects" button is highlighted. The page footer includes copyright information and links to Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

The screenshot shows the Project Search page in Salesforce ProjectForce. The top navigation bar is identical to the Project Overview page. The main header features the force.com logo and a search bar with the text "Write a part of the project name you want to find here". Below the header, the left sidebar contains sections for "My Upcoming Tasks" and "My Upcoming Milestones". The main content area displays search results for the query "hospital". The results show "Results 1 - 1 of 1 for 'hospital'" and a list of projects, with the first project being "Building a hospital". The search bar at the top of the main content area has "hospital" entered, and the "Find Projects" button is highlighted. The page footer includes copyright information and links to Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

Find Tasks/Milestones

From Project Detail, Project Task List, Project Member List and Search Tasks pages you can search for the tasks and milestones.

To locate a task or milestone must have at least one task or milestone that contains the word of the search.

The screenshot shows the Salesforce Project Detail page for a project named "Building a hospital". The breadcrumb trail is "Building a hospital > Tasks > Preparing the ground". The task details are as follows:

Id	#6959
Task Name	Preparing the ground
Description	
Project	Building a hospital
Start Date	7/22/2009
End Date	8/4/2009
Duration	10.0
Status	Open
ParentTask	
Priority	Medium
Percent Completed	0.0%
Milestone	<input type="checkbox"/>
Currency	
DateTime	
Email	
Phone	
URL	
Formula	10/19/2009

On the left, the "Project Members" section shows a user named Jose Iglesias. At the top, there is a search bar with the text "elevation" and a "Find Tasks" button. A red arrow points to the search bar.

The screenshot shows the Salesforce Project Search page. The breadcrumb trail is "Home | Projects | All Tabs". The search results are as follows:

Results 1 - 1 of 1 for 'elevation'	Page 1 of 1
Elevation of the structure	
Results 1 - 1 of 1 for 'elevation'	Page 1 of 1

On the left, the "My Upcoming Tasks" section shows two tasks: "Preparing the ground" (70 days late, due 8/4/2009) and "Elevation of the str..." (due in 29 days, 11/17/2009). At the bottom, there is a footer with the text "Copyright © 2000-2009 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance".

Add Member

In this page you can add new members. The application will automatically suggest users who have similar mails or names as you are writing the name or mail of the new member.

You can add members as administrators and send notifications by mail if you want.

The screenshot shows the 'Project Members List' page in the force.com application. A modal dialog titled 'Add new member to' is open. The dialog contains a search field labeled 'Add colleagues (enter name or email)' with a magnifying glass icon. Below the search field, a list of suggested users is displayed, including 'user1' and 'User1 Standar'. To the right of the list, there are two checkboxes: 'Email notifications' and 'Make Members Administrators'. At the bottom of the dialog are 'Send' and 'Cancel' buttons. Four yellow callout boxes with red lines pointing to specific elements are present:

- Callout 1: 'Enter the name of the User to add on this Project. When a list is displayed, select it.' points to the search field.
- Callout 2: 'Send an e-mail notification to the new member added.' points to the 'Email notifications' checkbox.
- Callout 3: 'User's added becomes administrator of the Project' points to the 'Make Members Administrators' checkbox.
- Callout 4: 'Click here' points to the 'Send' button.

The background page shows the 'Project Members List' header, a 'Find Tasks' search bar, and a sidebar with 'Project Quick Links' including 'New Task', 'New Milestone', 'Timeline', 'Task List', and 'Member List'. The footer includes copyright information and links to 'Privacy Statement', 'Security Statement', 'Terms of Use', and '508 Compliance'.

Manage Subscriptions

From this page you can select an option, and when the selected option happens within the project, you will receive a email notification.

You can choose more than one option.

To go to this page, you have to go to the project detail or members list pages, and click on "Manage Subscriptions" link.

Select any option and click on "Save" button.

The screenshot shows the Salesforce interface for managing project subscriptions. At the top, there's a navigation bar with 'force.com' logo, 'Setup', 'System Log', 'Help', 'Logout', and a 'Project' dropdown. Below this is a 'Projects Subscriptions' header with a 'Find Tasks' search bar and a 'TaskID' field. The main content area is titled 'Manage Project Subscriptions' and contains a section 'Alert me via email in the following scenarios' with four checkboxes: 'When a task has been (un)assigned to me', 'When a percent of a task assigned to me has been changed by another', 'All task status or percent complete changes within a Project', and 'When a task has been deleted'. There are 'Save' and 'Cancel' buttons at the bottom of the form.

- "When a task has been (un)assigned to me"

If you check this option, when any user assign a task to you, or you are unassigned of a task within the project, you will receive a email notification.

- "When a task assigned to me has been changed by another"

If you check this option, when any user change a task assigned to you within the project, you will receive a email notification.

- "All task status or percent complete changes within a Project"

If you check this option, when any user change the status or percent complete of any task within the project, you will receive a email notification

- "When a task has been deleted "

If you check this option, when any user delete a task within the project, you will receive a email notification.

Timeline (Gantt)

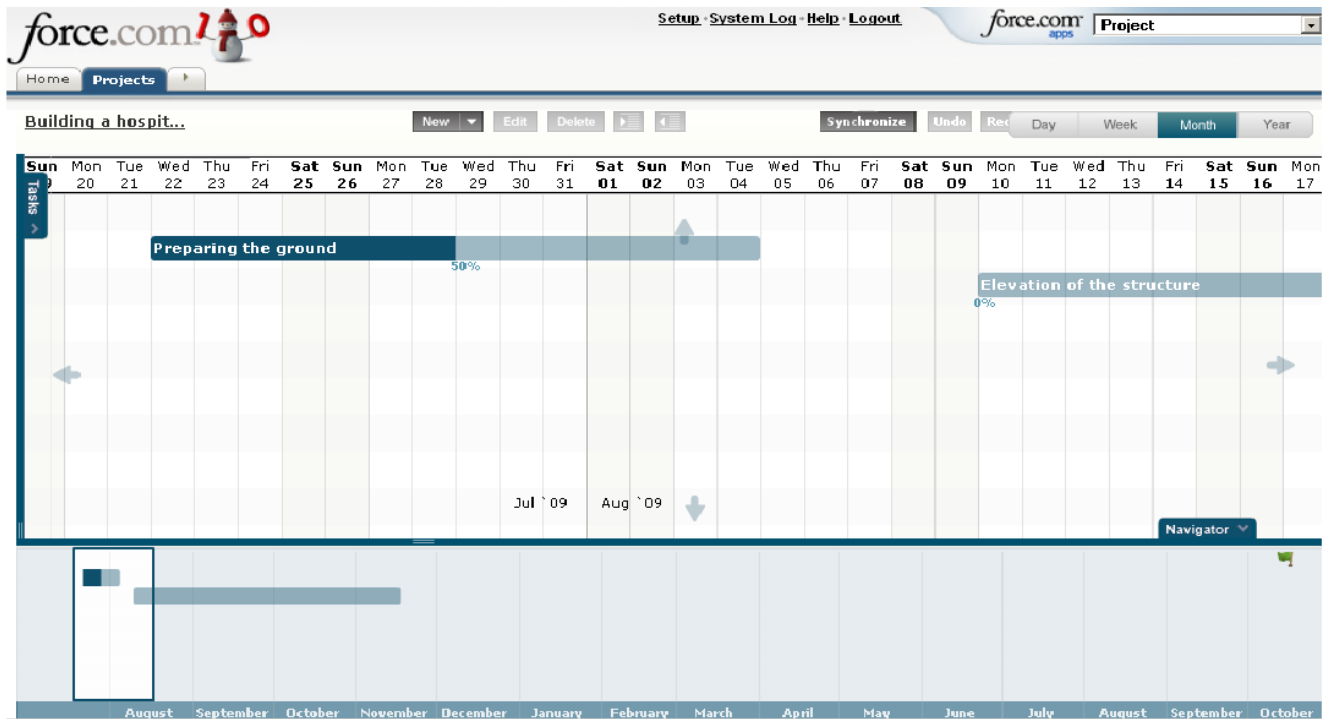
The Project timeline shows all the tasks in a dynamic interface in which users can interact with them.

In this page you have eight buttons:

- With the New button you can create new tasks or milestones above or below other tasks or milestones.
- With the Edit button you can edit the created tasks or milestones.
- With the Delete button you can delete the created tasks or milestones, to do this before you must select the task or milestone which want to delete.
- When you select a task and click on the right indentation arrow, the selected task is now parent of the task below.
- When you select a task which is parent of another task, and click on the left indentation arrow, the selected task is not more the parent of the task below.
- With the Synchronize button the Timeline was refreshed.
- With Undo and Redo buttons can revert the changes of the Timeline.

There are four views, this are in the top right of the page:

- The first view is the Day, with this view you can see all the task for the selected day. By default shows the present day.
- The second view is the Week, with this view you can see all the tasks by week.
- The third view is the Month, with htis view you can see all the tasks by month.
- The fourth view is the Year, with this view you can see all tasks by year.



Navigator

You can scroll through the timeline using the Navigator.

In Gantt you are able to drag tasks and milestones into the timeline and shrink and enlarge the tasks with the mouse.

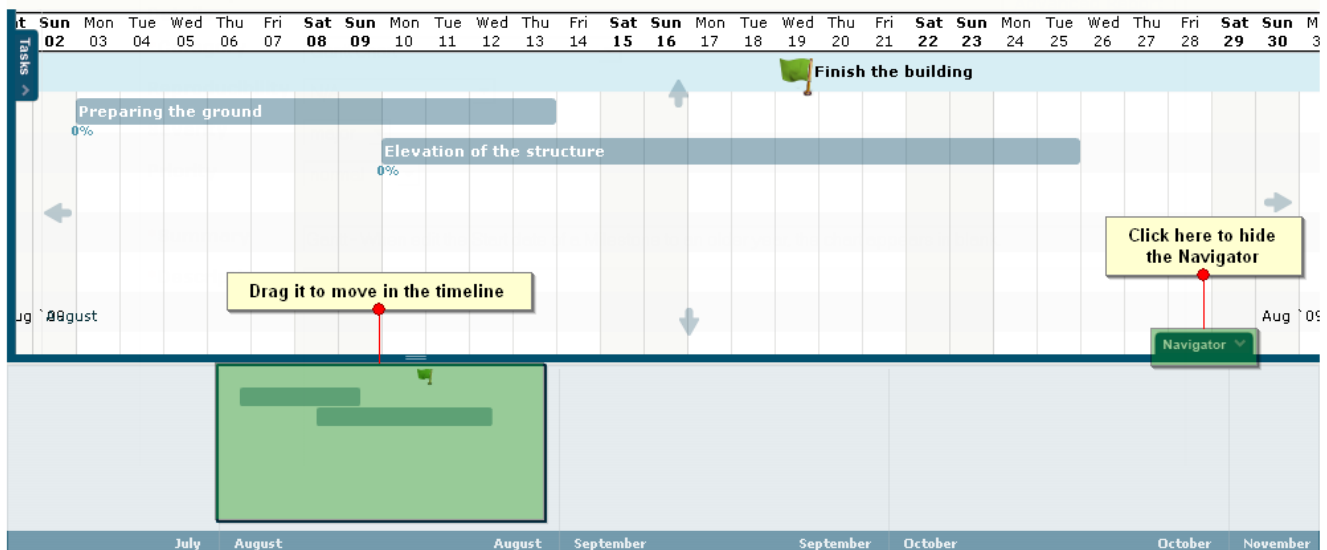
For drag the task or milestones you have to select the task, press the left button of the mouse, hold the left mouse button pressed, move the task to the right or left, and place it in the desired date.

For shrink the tasks, you have to put the cursor on the end of the task, the cursor becomes a two arrows, one pointing to the left and another pointing to the right, press the left button of the mouse, hold the left mouse button pressed, shrink the task to the left.

For enlarge the tasks, you have to put the cursor on the end of the task, the cursor becomes a two arrows, one pointing to the left and another pointing to the right, press the left button of the mouse, hold the left mouse button pressed, enlarge the task to the right.

When you shrink or enlarge the tasks, the start date and the end date are modified.

With the Gantt Navigator you can move for all the timeline to see all task and milestones.



Create new tasks

There are two possible ways to create a task:

1. From the task list page

To create a task from this page follow these steps:

1. Make double click on the Task Name column.
2. Enter the name of the task.

	Task Name	Duration (Days)	Start Date	Due Date	% Complete	Assignee
1	Finish the building	1	08/19/2009	08/19/2009	0	User2 Standar(0)
2	Preparing the ground	9	08/03/2009	08/13/2009	19	Jose Iglesias(0), User1 S
3	Elevation of the structure	7	08/07/2009	08/17/2009	51	Jose Iglesias(0)
▶	NEW TASK					

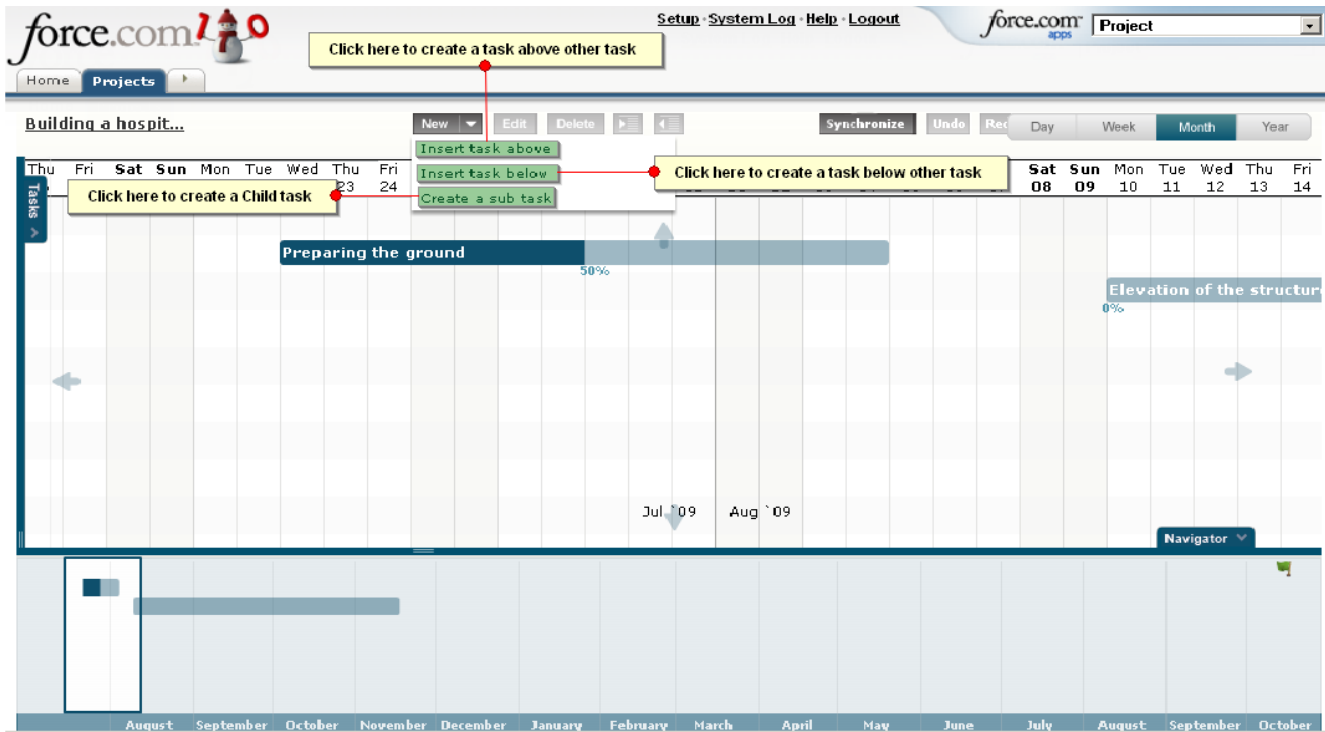
3. Press enter. The task is created with default values. In the Duration and %Complete columns the zero value is by default, in the Start Date and Due Date today's date is by default, and in the Assignee column the logged user is by default.

	Task Name	Duration (Days)	Start Date	Due Date	% Complete	Assignee
1	Finish the building	1	08/19/2009	08/19/2009	0	User2 Standar(0)
2	Preparing the ground	9	08/03/2009	08/13/2009	19	Jose Iglesias(0), User1 S
3	Elevation of the structure	7	08/07/2009	08/17/2009	51	Jose Iglesias(0)
4	NEW TASK	1	10/21/2009	10/21/2009	0	Jose Iglesias(0)

2. From the task chart page

To create a task from this page follow these steps:

1. Select one task (optional)
2. Click on New button and select one option.



3. A Create New Task overlay shows up.

Create Task

Details

Task Links

Assignees

= Required Information

Name

Description

Is milestone?

Priority

Start Date

Due Date

Duration

Completed

Assign To

+

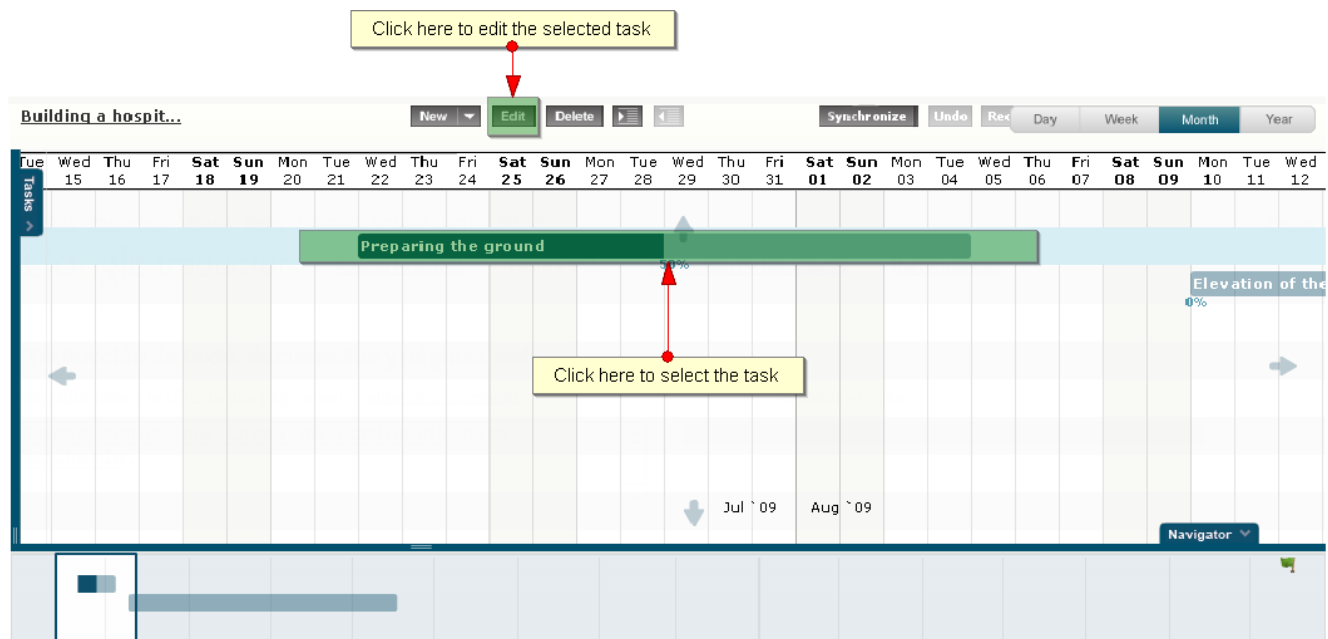
Add Assignee

Save

Cancel

Edit tasks

You must have a task selected for editing.



Edit Task

Details

Task Links

Assignees

= Required Information

Name

Preparing the ground

Description

Get all materials to prepare the ground.

Is milestone?

☐

Priority

Medium

Start Date

07/22/2009

[10/20/2009]

Due Date

08/04/2009

[10/20/2009]

Duration

10

Days

Completed

50 %

Assign To

Jose Iglesias (0%)

Add Assignee

Parent

Select a task

Save

Cancel

Create/Edit task has three tabs:

– Tab Details

Create Task [X]

Details Task Links Assignees

[] = Required Information

Name [] Write the name of the task

Description [] Write the description of the task

Is milestone? [] Transform the task into a milestone

Priority [Medium] Select the priority of the task
- Low
- Medium
- High

Start Date [10/20/2009] [10/20/2009] Select the Start and End date

Due Date [10/20/2009] [10/20/2009]

Duration [1] Days Enter the duration of the task.
(In this project appears in Days)

Completed [0 %] Select the percent completed

Assign To [Add Assignee] Click here to add an assignee.
(All tasks at least have one assignee)

Save Cancel

– Tab Task Links

Create Task [X]

Details Task Links Assignees

Select the Lag (in this case is on Days)

Select the Unit

Click here to delete the Task Link

Delete Choose a task.
Finish the building
Preparing the grou
Elevation of the str

Select the task that will be linked

Lag [2] Unit [Days] Type [finish to sta]

Select the Type of the Task Link.
- Finish to Start
(When finishes one task, begins the other task)

Add New Task Link Click here to add another assignee.

Save Cancel

– Tab Assignees

The screenshot shows the 'Create Task' dialog box with the 'Assignees' tab selected. The dialog has a title bar 'Create Task' and a close button. Below the title bar are three tabs: 'Details', 'Task Links', and 'Assignees'. The 'Assignees' tab contains a table with two columns: 'Assignee' and '% Dedicated'. There is a single row in the table. The 'Assignee' column has a dropdown menu open, showing three options: 'User1 Standar', 'User2 Standar', and 'Jose Iglesias'. The '% Dedicated' column has a dropdown menu showing '0 %'. To the right of the dropdown is a minus button. Below the table is a green button with a plus icon and the text 'Add Another Assignee'. At the bottom of the dialog are 'Save' and 'Cancel' buttons. Several yellow callout boxes with red dots pointing to specific elements are present: 'Select one user' points to the dropdown arrow in the 'Assignee' column; 'Select percent dedicated' points to the dropdown arrow in the '% Dedicated' column; 'Delete this assignee' points to the minus button; and 'Click here to Add another assignee' points to the 'Add Another Assignee' button.

Assignee	% Dedicated
User1 Standar User2 Standar Jose Iglesias	0 %

Annotations:

- Select one user
- Select percent dedicated
- Delete this assignee
- Click here to Add another assignee

Buttons: Save, Cancel

Task List

In the task list you can change some data of the tasks.

There are six columns:

- Task Name : In this column you would see the name of the created task or milestone.
- Duration: In this column you will see the estimated time in days/hours for the task or milestone.
- Start Date: This column displays the start date of the task.
- Due Date : This column displays the end date for the task or milestone.
- % Complete : In this column you can see the percent complete for the task or milestone.
- Assignee : This colum display the assegee of the task or milestone.

The screenshot displays the force.com interface for a project titled "Building a hospit...". The interface includes a navigation bar with "Home" and "Projects" tabs. Below the navigation bar, there is a table of tasks. The table has columns for Task Name, Duration (Days), Start Date, Due Date, % Complete, and Assignee. The tasks listed are:

	Task Name	Duration (Days)	Start Date	Due Date	% Complete	Assignee
1	Finish the building	1	08/19/2009	08/19/2009	0	Jose Iglesias(0)
2	Preparing the ground	9	08/03/2009	08/13/2009	0	Jose Iglesias(0), User1 S
3	Elevation of the structure	12	08/10/2009	08/25/2009	0	Jose Iglesias(0)

Annotations with red arrows point to specific elements:

- A box at the top left says: "Click on this box to change the name of the task". It points to the "Task Name" column header.
- A box on the left says: "Click here to change the Duration. With the Up and Down arrows can be changed too." It points to the "Duration (Days)" column header.
- A box in the middle says: "With double click appears the Tab 'Assignees'". It points to the "Assignee" column header.
- A box on the right says: "Click here to open and close the Task List. You can also drag it." It points to the "Tasks" tab in the right sidebar.
- A box at the bottom right says: "Click here to change the percent complete. With the Up and Down arrows can be changed too." It points to the "% Complete" column header.
- A box at the bottom left says: "If you click here displays a calendar widget". It points to a small calendar icon in the bottom left corner.

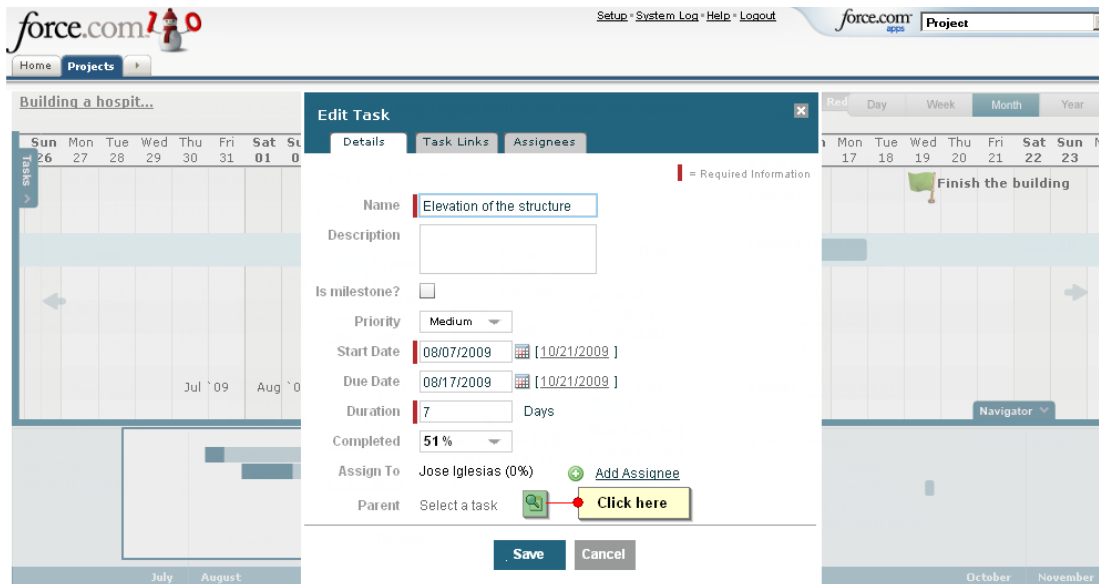
The interface also includes a "Navigator" at the bottom with a dropdown menu showing months: July, August, September, October, and November.

Indent/Outdent buttons (Parent Tasks)

In Gantt you can make a task parent of another task. There are two possible ways to do this:

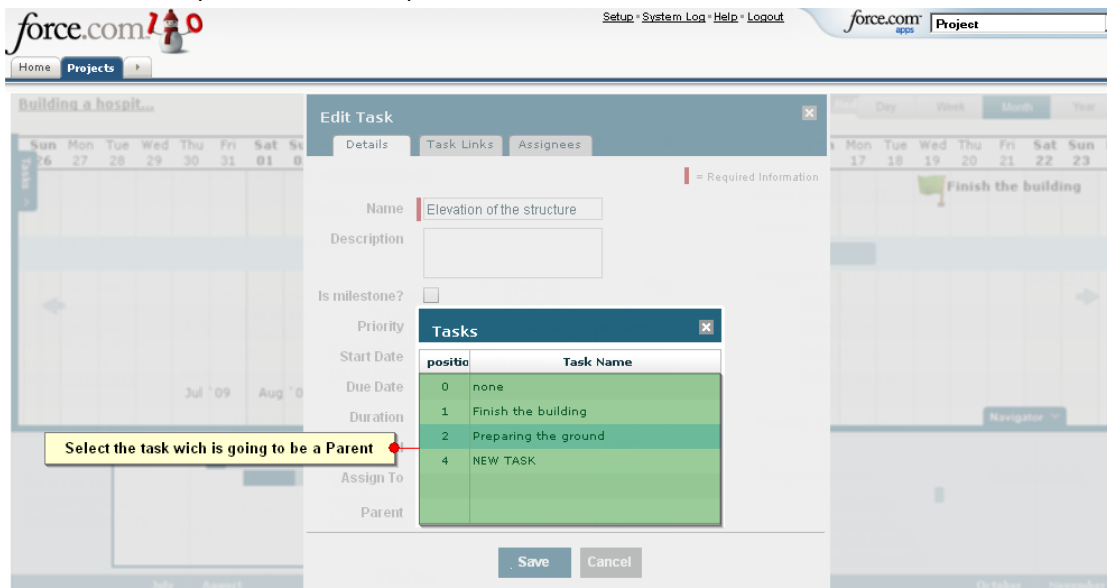
1. Editing the task:

1. Select the task you want to be the child.
2. Click on edit button. An Edit Task overlay shows up.
3. Click on Parent icon, next to the parent field.



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4. Select the task you want to be the parent.



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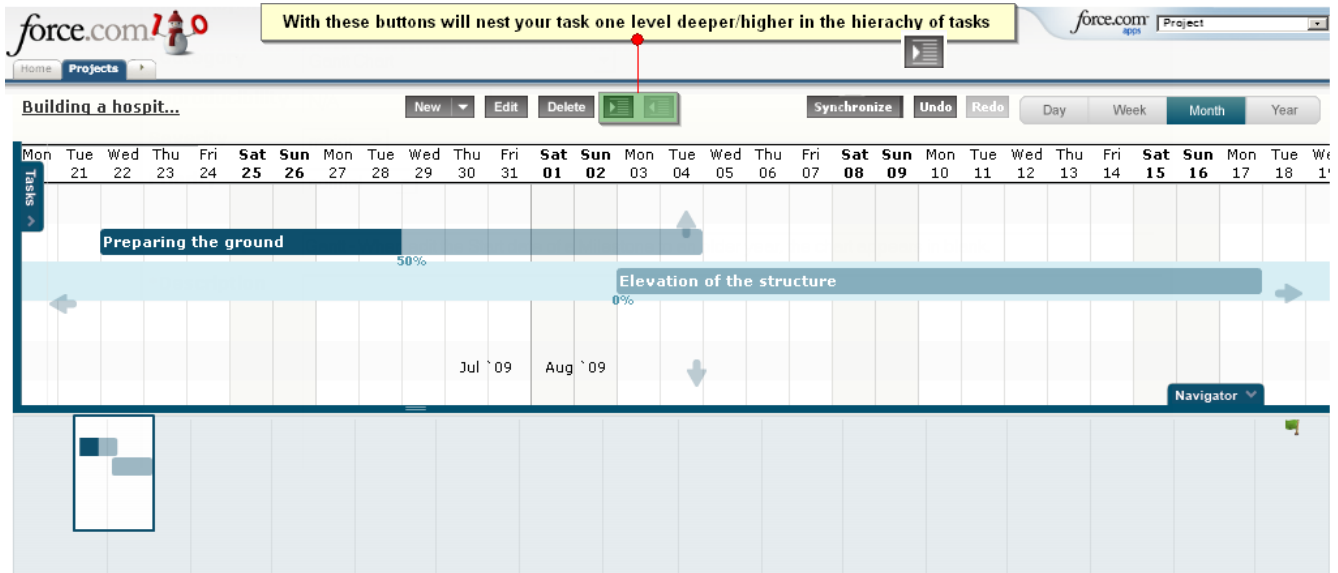
5. Click on Save button.

The selected task in the step 4, is now the parent of the task selected in the step 1. The parent task change the color to green and is resized to fit the child task.

2. Using the left/right indentation button:

Whit the Indent/outdent buttons will nest your task one level deeper/higher in the hierachy of tasks

1. Select the task you want to be the child.
2. Click on the left indentation button.



The selected task in the step 1, is now child of the task above. The parent task change the color to green and is resized to fit the child task.

