

PROJECTFORCE USER GUIDE

Created by
Jose Pedro Iglesias

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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 interface. At the top, there's a navigation bar with 'force.com' logo, links for 'Setup', 'System Log', 'Help', and 'Logout', and a 'Project' dropdown menu. Below this is a 'Home' button and a 'Projects' tab. The main header area includes 'Projects Overview' with a user icon, a 'Find Projects' search bar (callout 1), a 'Search' button, and a 'Task ID' field with a 'Go' button (callout 6). The left sidebar contains 'My Upcoming Tasks' (callout 4) with a 'View All Tasks' link, showing tasks like 'Preparing the ground' (overdue) and 'Elevation of the str...'. Below that is 'My Upcoming Milestones' (callout 5) with a task 'Finish the building'. The main content area has tabs for 'My Projects' (callout 1), 'New Projects' (callout 2), and 'All Projects' (callout 3), along with a 'Create New Project' button. A filter section shows 'ALL' selected, with a list of letters A-Z. Below the filter, a project titled 'Building a hospital' is displayed with 3 tasks, 1 milestone, and 1 member. Navigation links for 'Previous Page' and 'Next Page' are visible. The footer contains copyright information and links for 'Home', 'Projects', 'All Tabs', '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' page in Salesforce. The page has a header with 'force.com' logo, navigation links (Setup, System Log, Help, Logout), and a 'Project' dropdown menu. The main content area is titled 'Project Edit' and includes a 'New Project' link. The form is divided into two sections: 'Project Information' and 'Project Access'. The 'Project Information' section contains fields for Project Name, Description, Priority, Display Duration, Days in a work week, and Working hours. The 'Project Access' section contains checkboxes for 'Allow customer portal users' and 'Allow partner portal users', and a dropdown for 'Access'. Annotations with red lines point to specific fields and provide instructions:

- Project Name:** Write the Name of the new Project.
- Description:** Write the Description of the new Project.
- Priority:** Select the priority of the Project. Options: High, Medium, Low.
- Display Duration:** Select the Duration. (Not editable). The viewing of the future tasks can be displayed in days or hours.
- Days in a work week:** Select the Days in a work week. (Not editable). (These are the days of the week on which work on the project). Options: 1 - Monday, 2 - Monday - Tuesday, 3 - Monday - Tuesday - Wednesday, ...
- Working hours:** Write the working hours per working day. (Not editable). (Values between 1 and 24).
- Access:** Select the Access to the new Project. Options: Open, Closed, Private.

The page footer includes the text: 'Copyright © 2000-2009 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance'.

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 displays the 'Project Detail' page for a project named 'Building a hospital'. The page layout includes a top navigation bar with links like 'Setup', 'System Log', 'Help', and 'Logout'. Below this is a sidebar with 'Project Quick Links' containing 'New Task', 'New Milestone', 'Timeline', 'Task List', and 'Member List'. The main content area shows project details such as 'Project Name', 'Description', 'Image', 'Priority', 'Display Duration', 'Days in a work week', 'Working hours', 'Allow customer portal users', 'Allow partner portal users', 'Access', 'Created By', and 'Last Modified By'. Below these details are sections for 'All Tasks', 'Milestones', and 'Attachments'. Annotations highlight the 'New Task' link in the sidebar and the 'Click here to create a new Task' button in the 'All Tasks' section.

Project Quick Links:

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

Project Subscriptions:

- Manage Subscriptions

Project Members:

- Jose Iglesias

Project Details:

- Project Name: Building a hospital
- Description: In this project
- Image: [Image placeholder]
- 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

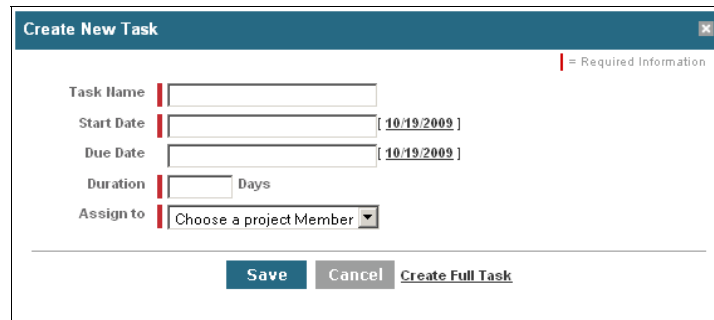
Milestones:

- No Milestones
- Create New Milestone

Attachments:

- No Attachments Yet
- Attach a new file

Create new Task (Overlay)

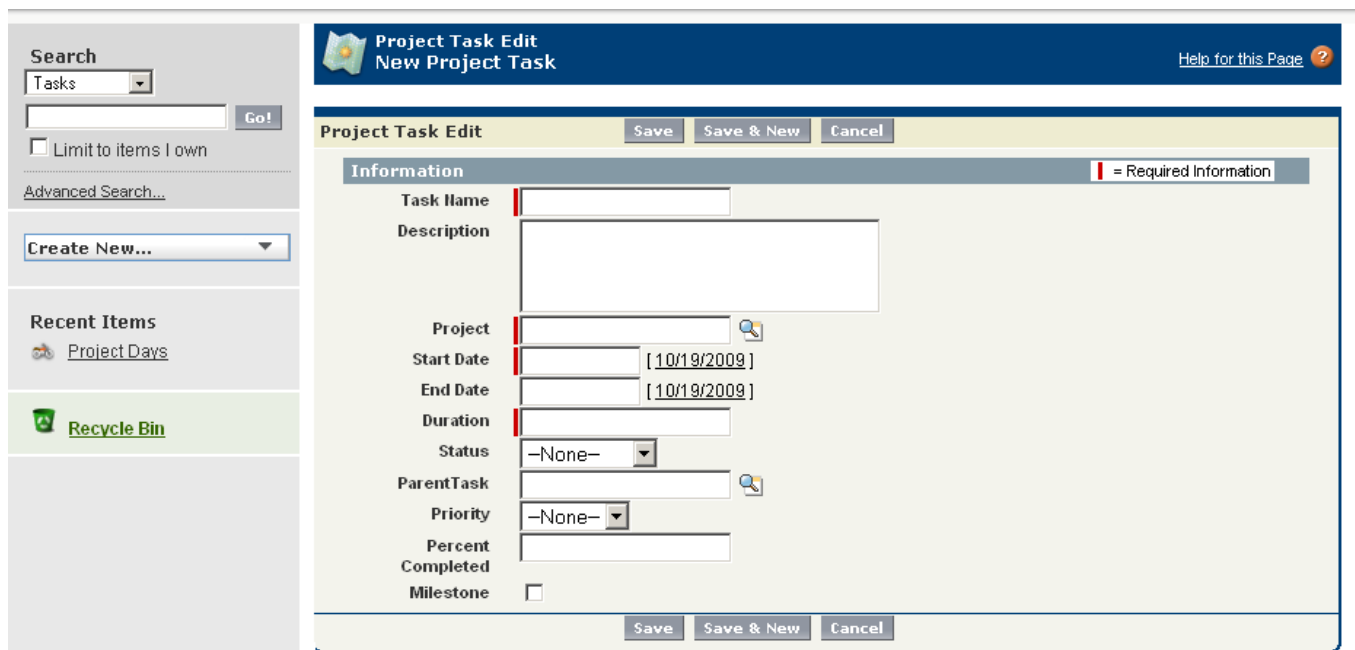


The 'Create New Task' overlay form contains the following fields and controls:

- Task Name**: Text input field with a red vertical bar on the left indicating required information.
- Start Date**: Date input field with a calendar icon, showing the date 10/19/2009.
- Due Date**: Date input field with a calendar icon, showing the date 10/19/2009.
- Duration**: Text input field followed by the word 'Days'.
- Assign to**: Dropdown menu with the text 'Choose a project Member'.
- Buttons**: 'Save', 'Cancel', and 'Create Full Task' buttons at the bottom.
- Legend**: A red vertical bar followed by the text '= Required Information' in the top right corner.

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

Create full Task



The 'Project Task Edit' form is a full-page interface for creating and editing tasks. It includes a sidebar on the left and a main form area on the right.

Sidebar:

- Search**: A search bar with a dropdown menu set to 'Tasks', a 'Go!' button, and a checkbox for 'Limit to items I own'. Below it is a link for 'Advanced Search...'. At the bottom of the search section is a 'Create New...' dropdown menu.
- Recent Items**: A list of recent items, including 'Project Days' and 'Recycle Bin'.

Main Form Area:

- Header**: 'Project Task Edit' and 'New Project Task' with a 'Help for this Page' link.
- Buttons**: 'Save', 'Save & New', and 'Cancel' buttons at the top.
- Information Section**: A section with a red vertical bar and the text '= Required Information'.
- Fields**:
 - Task Name**: Text input field.
 - Description**: Large text area.
 - Project**: Text input field with a magnifying glass icon.
 - Start Date**: Date input field with a calendar icon, showing 10/19/2009.
 - End Date**: Date input field with a calendar icon, showing 10/19/2009.
 - Duration**: Text input field.
 - Status**: Dropdown menu with '-None-' selected.
 - ParentTask**: Text input field with a magnifying glass icon.
 - Priority**: Dropdown menu with '-None-' selected.
 - Percent Completed**: Text input field.
 - Milestone**: Checkbox.
- Buttons**: 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

Projectforce [Setup](#) · [System Log](#) · [Help](#) · [Logout](#) **force.com** apps **Project**

[Home](#) [Projects](#)

Search

Tasks

Go!

☐ Limit to items I own

[Advanced Search...](#)

Create New...

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

New Project Task

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] | **Select the Start and End date of the task**

End Date **9/15/2009** [10/19/2009]

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 | **Enter the percent completed of the Task**

Milestone ☐ | **Converts the Task in Milestone**

[Save](#) [Save & New](#) [Cancel](#)

Select the Status of the Task

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

Select the priority of the Task:

- High
- Medium
- Low

Create a new Milestone

Project Detail

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 Details

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»

No Tasks

[Create New Task](#)

Milestones

New | Timeline | See More»

No Milestones

[Create New Milestone](#)

Attachments

No Attachments Yet

[Attach a new file](#)

Home | Projects | All Tabs

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Create new Milestone (Overlay)

Create New Milestone

Milestone Name

Start Date

[10/19/2009]

Assign to

Choose a project Member


Save

Cancel

Create Full Task

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

Other links

force.com  [Setup](#) [System Log](#) [Help](#) [Logout](#) [Project](#)

[Home](#) [Projects](#)

Project Detail

[Building a hospital > Detail](#)

[Find Tasks](#) [Search](#) TaskID: [Go](#)

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 Information

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](#)

Click here to go to Task Details

Task Information	Assignee	Priority	Status	Percent Complete
Preparing the ground 78 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](#)

Click here to go to Milestone Details

Milestone Information	Assignee	Date
Finish the building	Jose Iglesias	

Attachments

[New Attachment](#)

Name	Weight(Kb)	Created Date	Created By
Delete  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**

Links of the Widgets

The screenshot shows the 'Project Detail' page for a 'PRIVATE Proj'. The page has a navigation bar with 'Home' and 'Projects' tabs. Below the navigation bar, there's a 'Find Tasks' search bar. The main content area is divided into several sections:

- Project Quick Links:** A list of links with star icons: 'New Task', 'New Milestone', 'Timeline', 'Task List', 'Member List', and 'All User Tasks'. Red arrows point from each link to a corresponding callout box on the right.
- Members Widget:** A section showing a list of members. A red arrow points from the 'New Member' link to a callout box. The member 'Jose Iglesias' is listed below.
- Project Subscriptions:** A section with a 'Manage Subscriptions' link. A red arrow points from this link to a callout box. Below the link, there are three checkboxes.

Callout boxes (from top to bottom):

- Click here to go to Timeline and see all the tasks with a dynamic interface.
- Click here to go to Task List. In this page appears a list of all tasks of this Project.
- Click here to see the list of all Members of the Project.
- Click here to go to All User tasks. In this page appears a list of all tasks of the logged User.
- Click here to add a new member of the Project.
- Configure sending e-mails when there are changes on 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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force.com apps Force.com

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

Project
 Building a hospital

Enter Task name...

 Task ID:

[Overview](#) > [Building a hospital](#) > [Tasks List](#) > **Preparing the ground**

Project Quick Links

- ★ [Timeline](#)
- ★ [Task List](#)
- ★ [Member List](#)
- ★ [All User Tasks](#)

Members Widget

[New Member](#) | [See More>](#)

Jose Iglesias

Edit Task

Mark Complete

Delete

PDF Export

Id	#24075
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	50.00%
Milestone	<input type="checkbox"/>
Created By	Jose Iglesias , 3/15/2010 6:15 AM
Last Modified By	Jose Iglesias , 3/15/2010 6:15 AM
Status	50% <div style="width: 50%; height: 10px; background: linear-gradient(to right, green, white);"></div>
Files	Add New Attachment
Assigned To	Jose Iglesias
Notes	Edit Notes
Comments	<div style="border: 1px solid #ccc; min-height: 100px;"></div> <div style="text-align: center; margin-top: 5px;">Save Comment</div>

Edit Task

Mark Complete

Delete

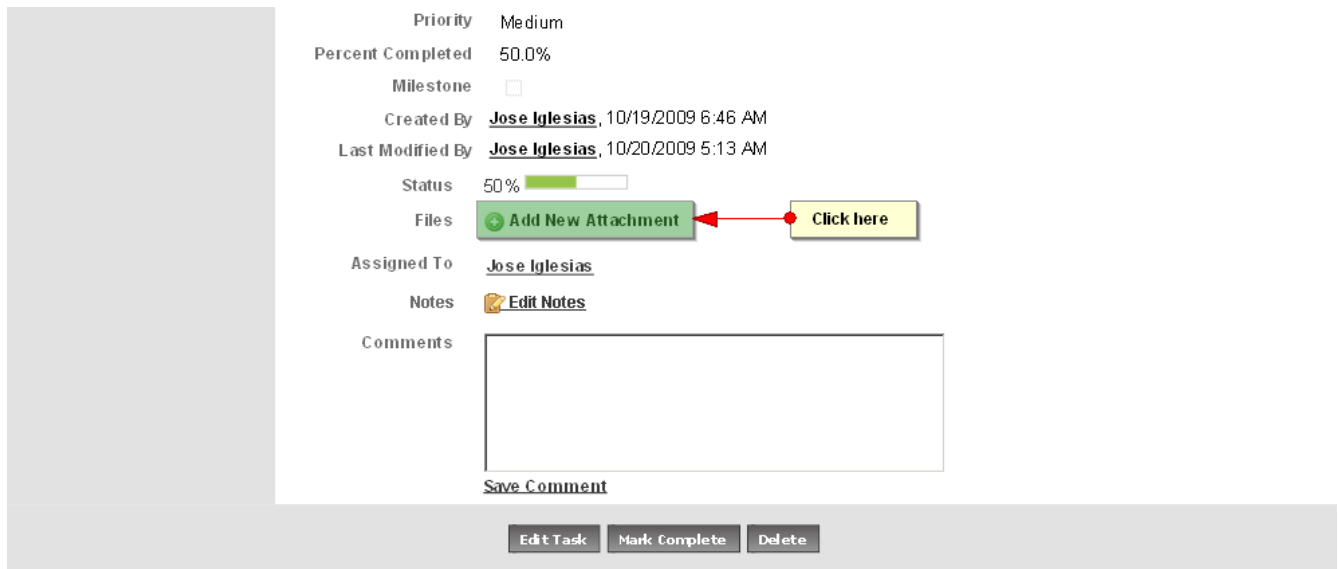
PDF Export

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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.

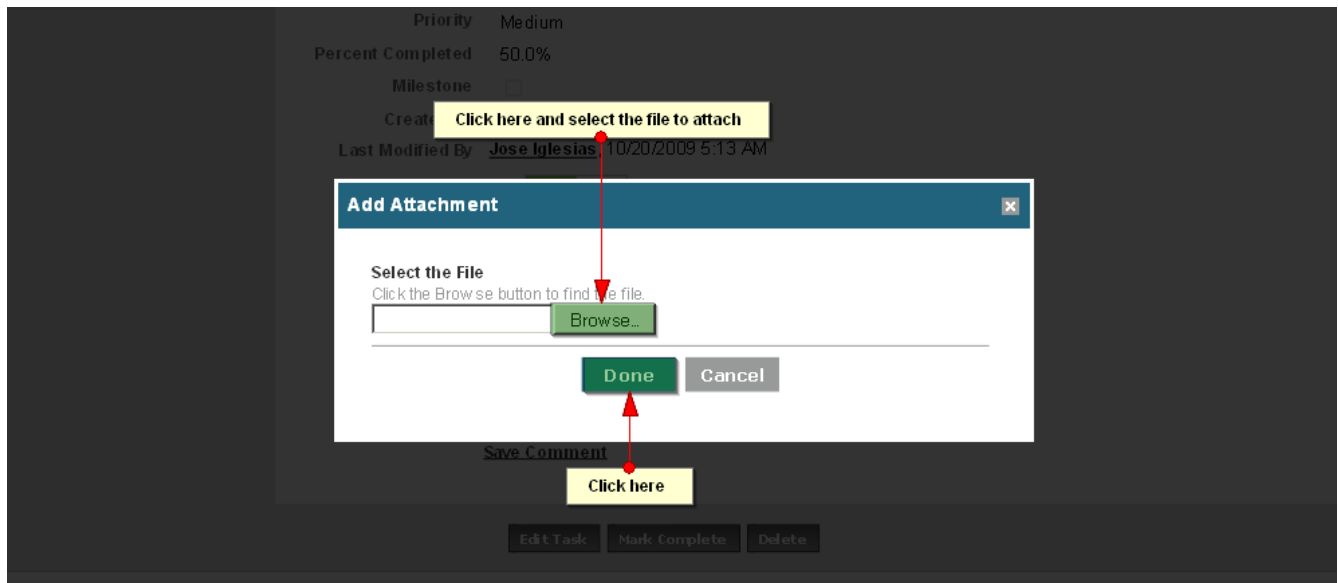


The screenshot shows a task details page with the following fields and values:

- 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 yellow box labeled "Click here")
- Assigned To: [Jose Iglesias](#)
- Notes: [Edit Notes](#)
- Comments:
[Save Comment](#)

At the bottom of the page 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:

- Header: **Add Attachment** (with a close button)
- Select the File:

Click the Browse button to find the file.

[Browse...](#)
- Buttons: [Done](#) (highlighted with a red arrow and a yellow box labeled "Click here"), [Cancel](#)

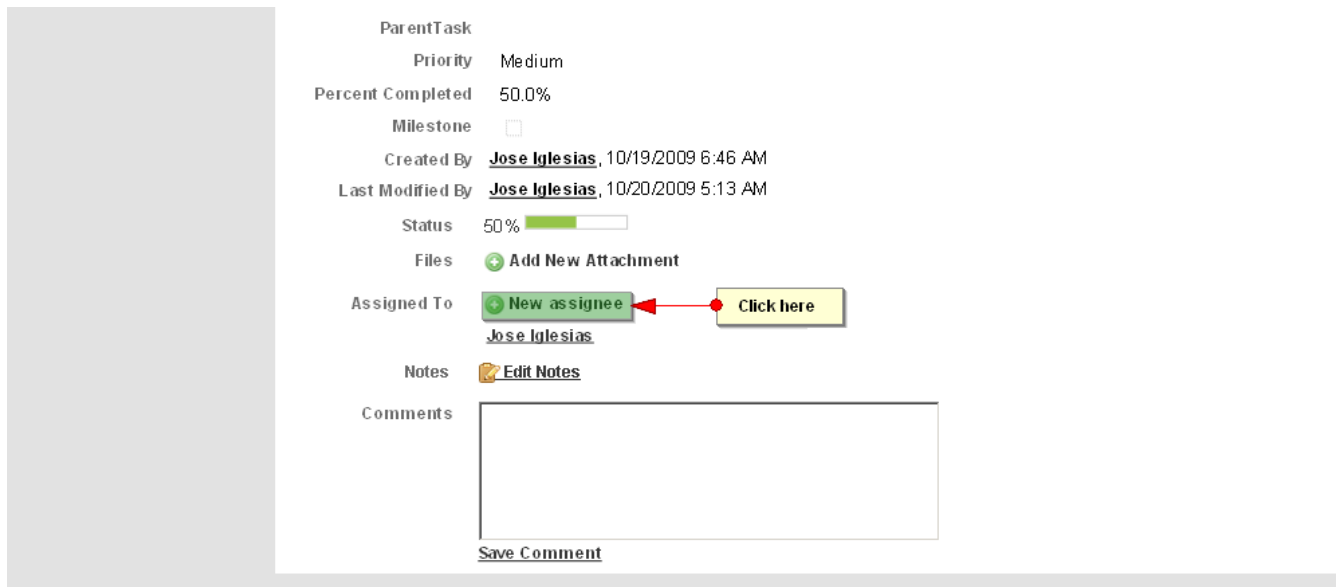
Below the dialog box, the [Save Comment](#) link is visible, and at the bottom of the page are three buttons: [Edit Task](#), [Mark Complete](#), and [Delete](#).

The file is added in the task or milestone.

Add Assignees

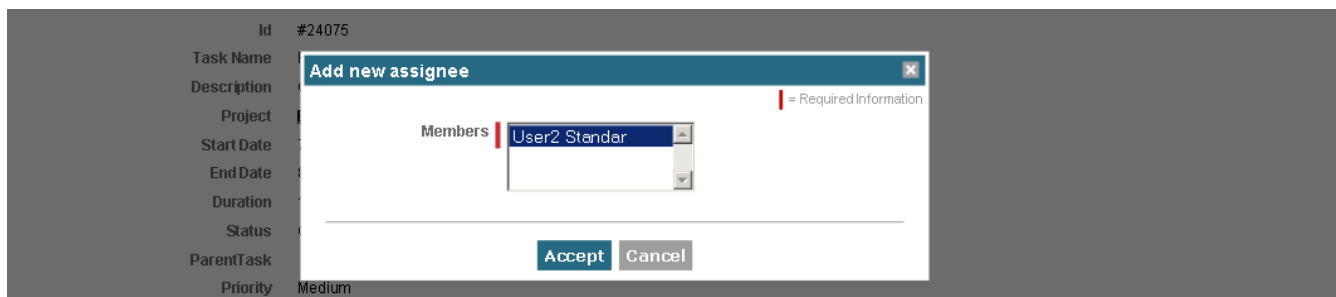
You can add Assignees to the task or milestone. To do this make the following steps.

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



The screenshot shows a task details page. On the left is a grey sidebar. The main content area displays task information: 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), Notes (Edit Notes), and Comments (text area with Save Comment button). A red arrow points from a yellow callout box labeled 'Click here' to the 'New assignee' button.

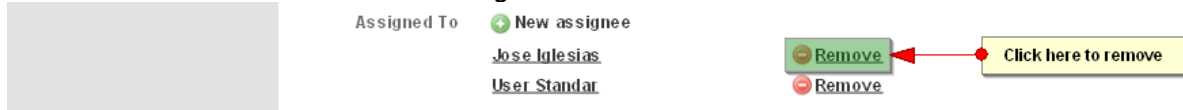
2. Select a member and click on Accept button. If you want to add more than one assignee, select them (multiselect) and click on Accept button.



The screenshot shows a modal dialog box titled 'Add new assignee'. It has a close button (X) in the top right. A red vertical bar indicates required information. The 'Members' section contains a dropdown menu with 'User2 Standar' selected. At the bottom are 'Accept' and 'Cancel' buttons. The background shows a task list with columns for Id, Task Name, Description, Project, Start Date, End Date, Duration, Status, ParentTask, and Priority (Medium).

The assignee is added in the task or milestone.

Click on Remove button to delete an Assignee.



The screenshot shows the 'Assigned To' section of the task details page. It lists 'New assignee', 'Jose Iglesias', and 'User Standar'. Each name has a 'Remove' button next to it. A red arrow points from a yellow callout box labeled 'Click here to remove' to the 'Remove' button next to 'Jose Iglesias'.

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, User1 Standar, with 'Remove' links for each.
- Comments:** A text box containing 'This is a comment.' and a 'Save Comment' button.
- Buttons:** Edit Task, Mark Complete, Delete.

Callout boxes and arrows indicate:

- 'Write your comment of the task here' pointing to the comment text box.
- 'Click here' pointing to the 'Save Comment' button.

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, but with the comment displayed below the text box. The comment box is empty. The displayed comment includes:

- Created By:** Jose Iglesias, Tue Oct 20 12:58:03 GMT 2009
- Text:** This is a comment.
- Buttons:** Delete Comment

Callout boxes and arrows indicate:

- 'Click here to delete the comment' pointing to the 'Delete Comment' button.
- 'This is the newly added comment' pointing to the entire comment block.

Mark complete a task/milestone

Project Building a... Find Tasks Search Task ID: Go

Building a hospital > Tasks > Preparing the ground [Edit Task](#) [Mark Complete](#) [Delete](#) [PDF Export](#)

Project Members New | See More»

- User 2 Standar
- User 1 Standar
- Jose Iglesias

Task Details:

- 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: ☐
- 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: [New assignee](#)
- [Jose Iglesias](#) [Remove](#)
- [User1 Standar](#) [Remove](#)

Project Building a... Find Tasks Search Task ID: Go

Building a hospital > Tasks > Preparing the ground [Edit Task](#) [Delete](#) [PDF Export](#)

Project Members New | See More»

- User 2 Standar
- User 1 Standar
- Jose Iglesias

Task Details:

- 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: ☐
- Created By:

This task has been marked complete
- Last Modified By: Jose Iglesias, 10/20/2009 5:13 AM
- Status: 100%
- Files: [Add New Attachment](#)
- Assigned To: [New assignee](#)
- [Jose Iglesias](#) [Remove](#)
- [User1 Standar](#) [Remove](#)

Task Notes


Notes

Comments

[Edit Notes](#) [Click here](#)

[Save Comment](#)

In this page you can add specific notes of the task.

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Home Projects

Project Task Notes

Find Tasks Enter Task name... Search Task ID: Go

Overview > Building a hospital > Tasks List > Preparing the ground > Project Task Notes

Project Quick Links

- ★ Timeline
- ★ Task List
- ★ Member List
- ★ All User Tasks

Task Notes

Source

Styles Format Font Size

(32k character limit counting HTML tags) - Html Characters remaining: 32000

Save Save & Exit Cancel

Home | Projects | All Tabs

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Tasks and Milestones List

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

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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 childs. If a Parent is deleted, all of your childs 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

Quickfilter: 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

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User Tasks

From here you can see the list of all the assigned tasks to the logged User.

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force.com apps Force.com

Home Projects

Project Project Detail

Find Projects Enter Project name... Search Task ID: Go

Overview > User Tasks

Select Project: Building a hospital

Select a Project

Name: Building a hospital
Description: In this project...
Priority: High
Duration: Days
Days in work week: Mon - Fri

Number of records: 1
Records per page: 10

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Name	Project	Start Date	End Date	Status	Priority	Milestone	Duration	% Complete
Preparing the ground	Building a hospital	7/22/2009	8/4/2009	Open	↓		10.0	50%

Here you can see all the assigned tasks of this Project

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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 Force.com Projects Overview page. At the top, there is a navigation bar with links for Setup, System Log, Help, and Logout. A search bar is present with the text "Write a part of the project name you want to find here". Below this, the "Find Projects" section is active, showing a search for "hospital". The results show a project titled "Building a hospital" with 3 tasks, 1 milestone, and 1 member. The left sidebar contains sections for "My Upcoming Tasks" (with tasks like "Preparing the ground" and "Elevation of the str...") and "My Upcoming Milestones" (with a task "Finish the building").

The screenshot shows the Force.com Project Search page. The search bar at the top contains the text "hospital". The results section displays "Results 1 - 1 of 1 for 'hospital'" and shows a project titled "Building a hospital" with the text "In this project". The left sidebar is identical to the previous screenshot, showing "My Upcoming Tasks" and "My Upcoming Milestones".

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 Force.com Project Detail page for a project named "Building a hospital". The page has a header with the Force.com logo, navigation links (Home, Projects), and a search bar. A yellow callout box points to the search bar with the text "Write a part of the task or milestone name that you want to find here". The search bar contains the word "elevation". The page displays a list of tasks for the project, with the first task being "Preparing the ground". The task details are shown on the right side of the page.

Field	Value
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

The screenshot shows the Force.com Project Search page. The search bar contains the word "elevation". The page displays a list of search results for the project "Building a hospital". The first result is "Preparing the ground", which is marked as "Overdue" and "76 days late, due 8/4/2009". The second result is "Elevation of the structure", which is marked as "Due in 29 days (11/17/2009)". The page also includes a "My Upcoming Tasks" section on the left side.

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

Home | Projects | All Tabs

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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 ProjectForce application. A modal dialog titled 'Add new member to' is open. The dialog has a text input field with the placeholder 'Add colleagues (enter name or email)'. Below the input field, a list of suggested users is displayed, including 'user1' and 'User1 Standar'. To the right of the input field, a yellow callout box says 'Enter the name of the User to add on this Project. When a list is displayed, select it.' Below the list of users, there are two checkboxes: 'Email notifications' and 'Make Members Administrators'. To the left of these checkboxes, two yellow callout boxes provide instructions: 'Send an e-mail notification to the new member added.' and 'User/s added becomes administrator of the Project'. At the bottom of the dialog are 'Send' and 'Cancel' buttons. A yellow callout box points to the 'Send' button with the text 'Click here'. The background shows the ProjectForce interface with a sidebar containing 'Project Quick Links' and 'Project Sub' sections.

Manage Subscriptions

From this page you can select an option , and when the selected option happen 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 displays the Salesforce interface for managing project subscriptions. At the top, there's a navigation bar with 'force.com' logo, links for 'Setup', 'System Log', 'Help', and 'Logout', and a 'Project' dropdown menu. 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 includes a section for selecting email alert scenarios. The sidebar on the left provides quick links to various project-related features.

- "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)

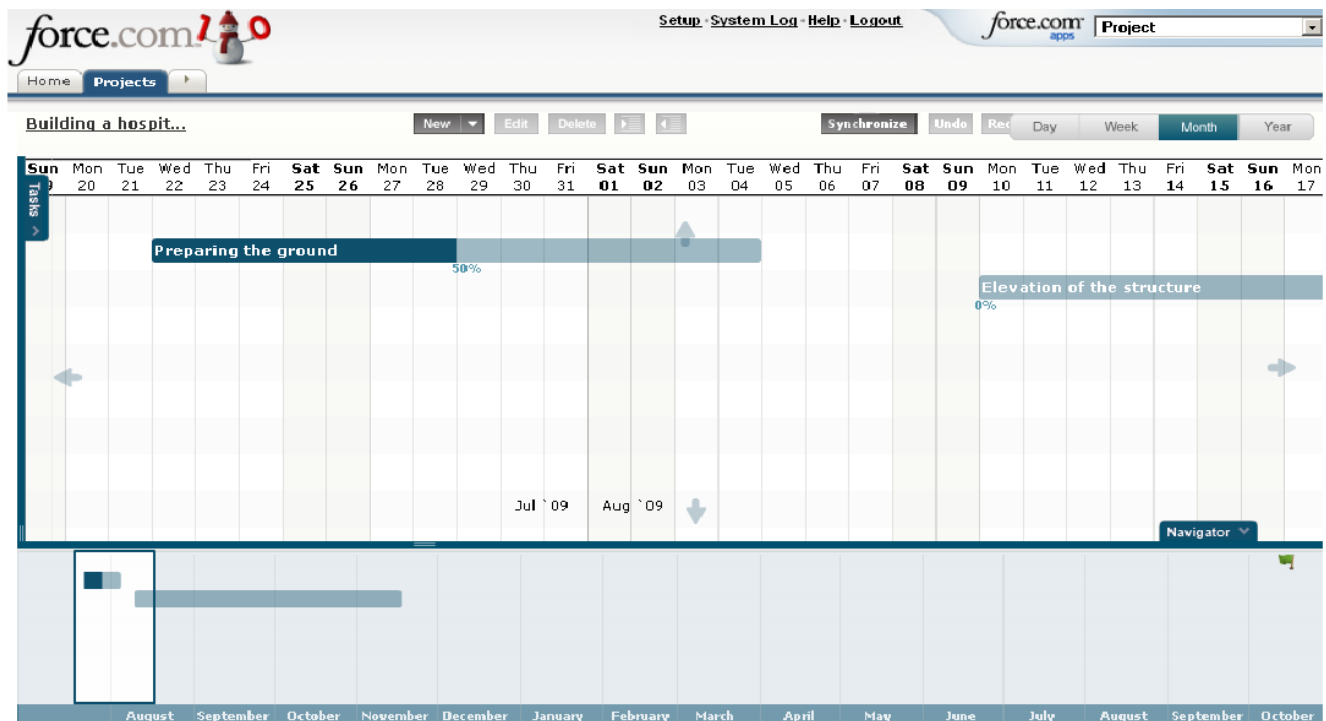
The Project timeline shows all the tasks in a dynamic interface in which users can interact with them.

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 this 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.

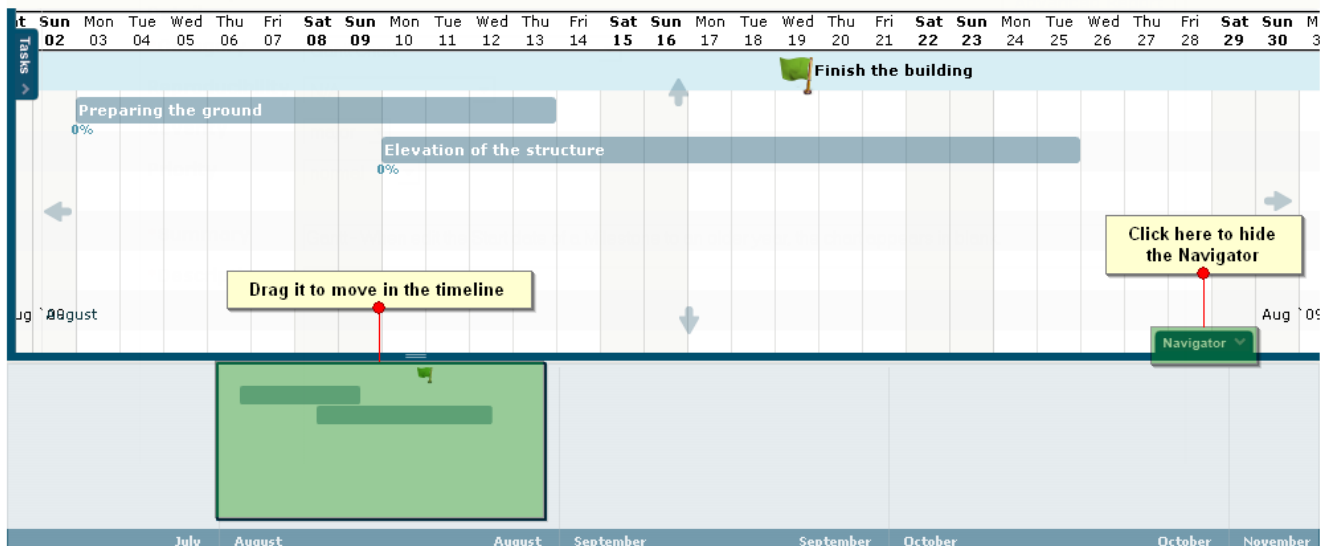
For drag the task or milestones you have to select the task, press the left button of the mouse, hold the left mouse button pressed, move the task to the right or left, and place it in the desired date.

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 empty Task Name box.
2. Enter the name of the task.

The screenshot shows the force.com interface for a project named 'Building a hospital'. The task list table is as follows:

	Task Name	Duration (Days)	Start Date	End Date	% Completed	Assignee
1	Preparing the ground	10	07/22/2009	08/04/2009	50	Jose Iglesias(0)
2	Finish the building	1	02/01/2010	02/01/2010	0	User2 Standar(0),Jose I...
3	Elevation the structure	46	12/28/2009	03/01/2010	0	Jose Iglesias(0)
•	new Task	1	03/15/2010	03/15/2010	0	

The interface includes a top navigation bar with 'force.com' logo, 'Setup', 'System Log', 'Help', and 'Logout'. Below the project name, there are buttons for 'New', 'Edit', 'Delete', 'Cut', 'Copy', 'Paste', 'Synchronize', 'Undo', and 'Redo'. A right sidebar shows 'Tasks', 'Project', and 'Members' tabs. A calendar view at the bottom shows months from August to March.

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.

This screenshot shows the same 'Building a hospital' project page, but with an additional task added. The task list table is now:

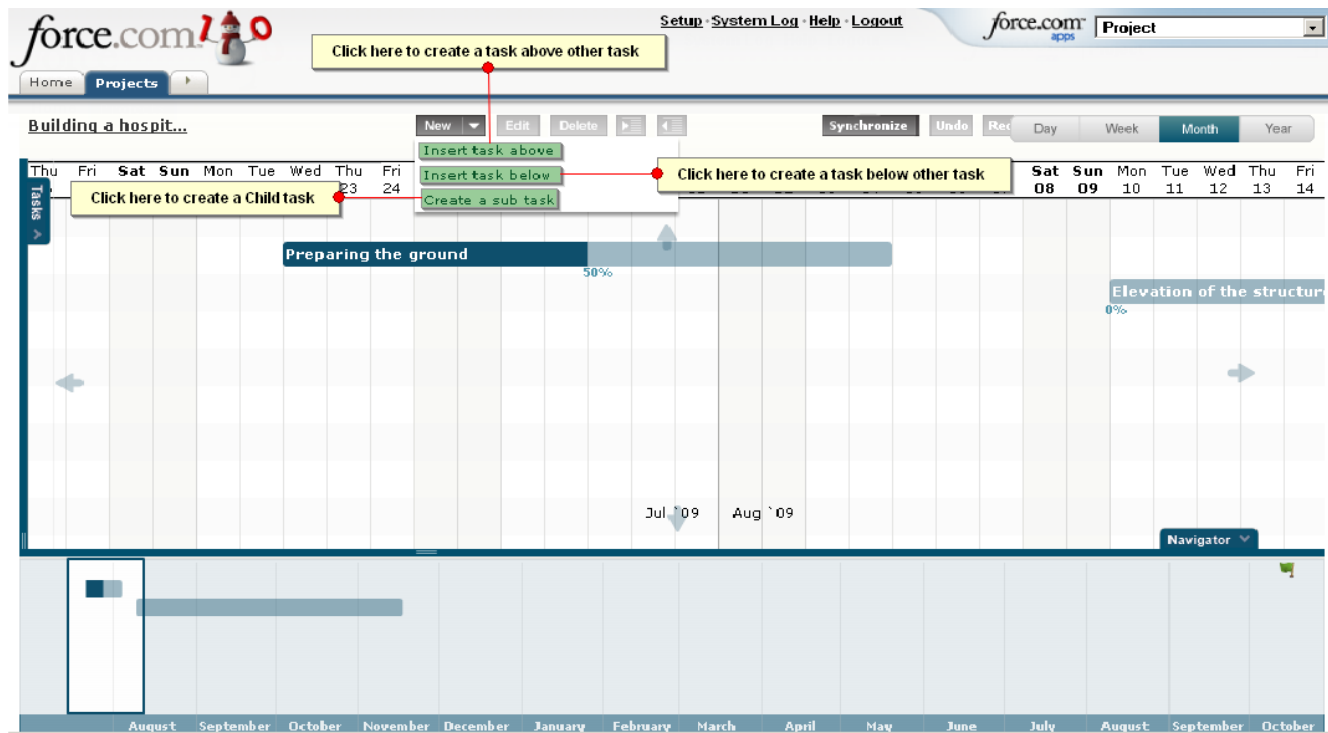
	Task Name	Duration (Days)	Start Date	End Date	% Completed	Assignee
1	Preparing the ground	10	07/22/2009	08/04/2009	50	Jose Iglesias(0)
2	Finish the building	1	02/01/2010	02/01/2010	0	User2 Standar(0),Jose I...
3	Elevation the structure	46	12/28/2009	03/01/2010	0	Jose Iglesias(0)
4	new Task	1	03/15/2010	03/15/2010	0	Jose Iglesias(0)
•		1	03/15/2010	03/15/2010	0	

The interface elements are consistent with the previous screenshot, showing the project name, action buttons, sidebar, and calendar view.

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

Medium

Start Date

10/20/2009

[10/20/2009]

Due Date

10/20/2009

[10/20/2009]

Duration

1

Days

Completed

0 %

Assign To

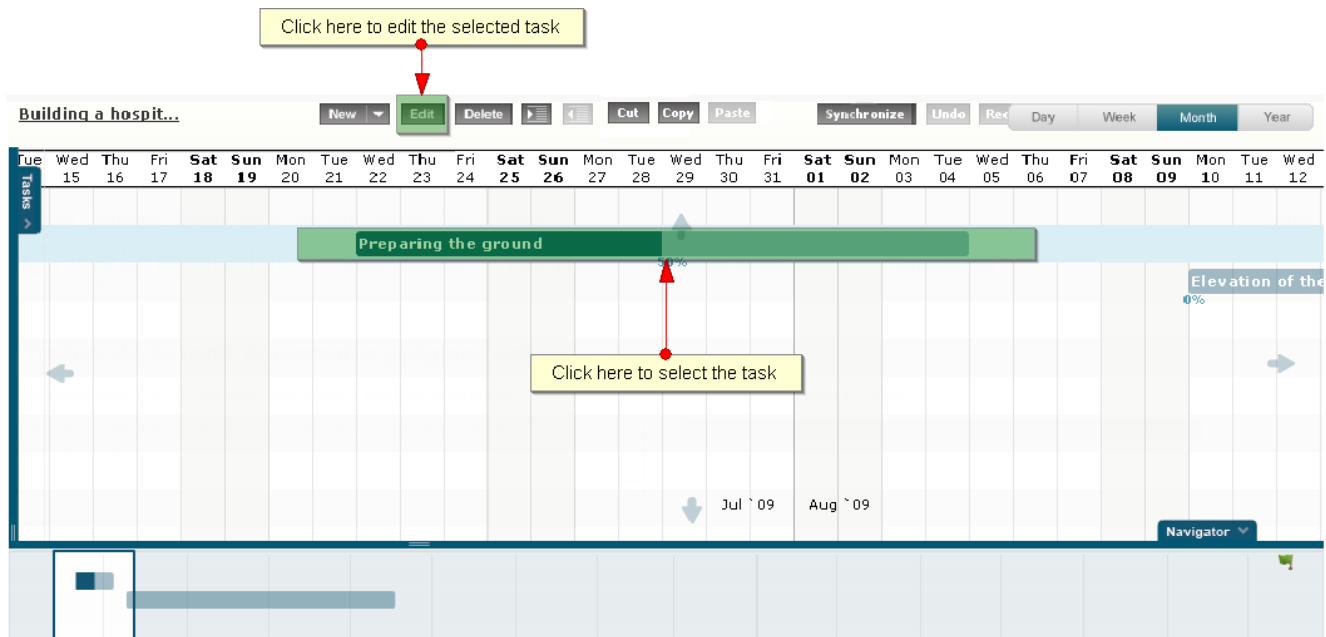
Add Assignee

Save

Cancel

Edit tasks

You must have a selected task to editing.



Edit Task

Details

Task Links

Assignees

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

The 'Create Task' dialog box has three tabs: 'Details', 'Task Links', and 'Assignees'. The 'Details' tab is active. It contains the following fields and annotations:

- Name:** A text input field with a red asterisk. Annotation: 'Write the name of the task'.
- Description:** A text input field with a red asterisk. Annotation: 'Write the description of the task'.
- Is milestone?:** A checkbox. Annotation: 'Transform the task into a milestone'.
- Priority:** A dropdown menu with 'Medium' selected. Annotation: 'Select the priority of the task' with a list: '- Low', '- Medium', '- High'.
- Start Date:** A date input field with '10/20/2009' and a calendar icon. Annotation: 'Select the Start and End date'.
- Due Date:** A date input field with '10/20/2009' and a calendar icon.
- Duration:** A text input field with '1' and a unit dropdown with 'Days' selected. Annotation: 'Enter the duration of the task. (In this project appears in Days)'.
- Completed:** A dropdown menu with '0 %' selected. Annotation: 'Select the percent completed'.
- Assign To:** A button labeled 'Add Assignee'. Annotation: 'Click here to add an assignee. (All tasks at least have one assignee)'.

At the bottom are 'Save' and 'Cancel' buttons. A legend indicates that a red asterisk means 'Required Information'.

– Tab Task Links

The 'Create Task' dialog box has three tabs: 'Details', 'Task Links', and 'Assignees'. The 'Task Links' tab is active. It contains the following fields and annotations:

- Delete:** A button. Annotation: 'Click here to delete the Task Link'.
- Choose a task:** A dropdown menu with a list: 'Finish the building', 'Preparing the groui', 'Elevation of the str'. Annotation: 'Select the task that will be linked'.
- Lag:** A text input field with '2' and a unit dropdown with 'Days' selected. Annotation: 'Select the Lag (in this case is on Days)'.
- Unit:** A dropdown menu with 'Days' selected. Annotation: 'Select the Unit'.
- Type:** A dropdown menu with 'finish to sta' selected. Annotation: 'Select the Type of the Task Link. - Finish to Start (When finishes one task, begins the other task)'.

At the bottom are 'Add New Task Link', 'Save', and 'Cancel' buttons. Annotation for 'Add New Task Link': 'Click here to add another assignee.'

– Tab Assignees

Create Task Select percent dedicated

Details Task Links **Assignees**

Assignee	% Dedicated
<div>Select one user</div> <div>User1 Standar User2 Standar Jose Iglesias</div>	<div>0 %</div> <div>–</div> <div>Delete this assignee</div>

+ Add Another Assignee Click here to Add another assignee

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 column display the assignee of the task or milestone.

Click on this box to change the name of the task

force.com [Setup](#) [System Log](#) [Help](#) [Logout](#) [Project](#)

Home [Projects](#)

Building a hospit...

Click here to change the Duration. With the Up and Down arrows can be changed too.

With double click appears the Tab "Assignees"

Click here to open and close the Task List. You can also drag it.

Undo Redo Day Week Month Year

	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)
▶						

Click here to change the percent complete. With the Up and Down arrows can be changed too.

If you click here displays a calendar widget

Navigator

July August August September September October October November

Tab Project

In this tab appears the information of the Project (not editable)

The screenshot shows the 'Project Information' tab for a project named 'Building a hospital'. The interface includes a top navigation bar with 'Home' and 'Projects' tabs. Below the navigation bar is a toolbar with buttons for 'New', 'Edit', 'Delete', 'Cut', 'Copy', 'Paste', 'Synchronize', 'Undo', and 'Redo'. The main content area is divided into two sections: 'Project Information' on the left and a calendar view on the right. The 'Project Information' section contains the following details:

- Project Name:** Building a hospital
- Description:** In this project ...
- Priority:** High
- Display Duration:** Days
- Days in a work week:** 8
- Working hours:** 5
- Image:** A small image of a modern building.

The calendar view on the right shows a grid for the month of February 2010, with columns for days of the week and rows for dates. The 'Project' tab is selected in the sidebar.

Tab Members

In this Tab appears the information of all the Project Members (not editable).
Select a member of the list to see your information.

The screenshot shows the 'Project Members' tab for the same project 'Building a hospital'. The interface is similar to the previous tab, with a top navigation bar and a toolbar. The main content area is divided into two sections: 'Find' on the left and 'Project Members' on the right. The 'Find' section contains a search bar and a list of member details:

- Name:** Jose Iglesias
- First Name:** Jose
- Last Name:** Iglesias
- Company:**
- Title:**
- Profile:** Project Administrator
- Project Owner:** Yes
- Member since:** 03/15/2010

The 'Project Members' section shows a list of members with the following details:

- Name:** Jose Iglesias
- User2 Standar:**

At the bottom of the 'Find' section are 'Save' and 'Cancel' buttons. The 'Members' tab is selected in the sidebar.

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.

The screenshot shows the 'Edit Task' overlay for a task named 'Elevation of the structure'. The 'Parent' field is highlighted with a red dot and a yellow callout box that says 'Click here'. The 'Parent' field is currently empty, and the 'Click here' button is next to it. The 'Parent' field is labeled 'Select a task'.

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

The screenshot shows the 'Edit Task' overlay for a task named 'Elevation of the structure'. The 'Parent' field is highlighted with a red dot and a yellow callout box that says 'Select the task which is going to be a Parent'. A 'Tasks' list is shown, listing tasks: 'none', 'Finish the building', 'Preparing the ground', and 'NEW TASK'.

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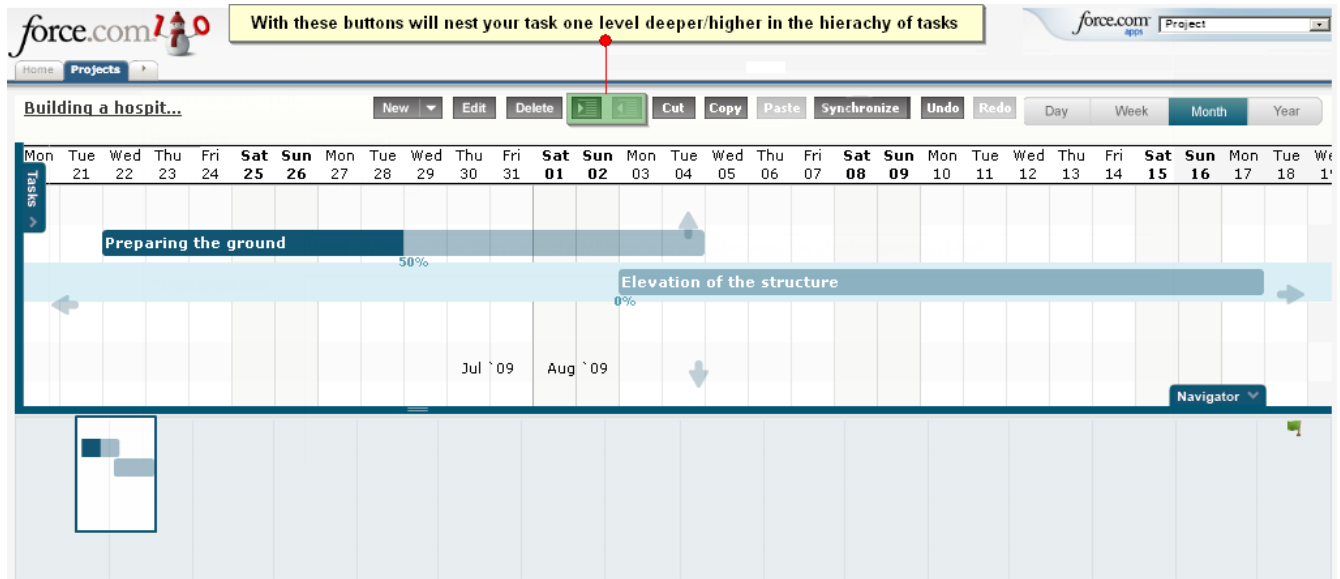
5. Click on Save button.

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.

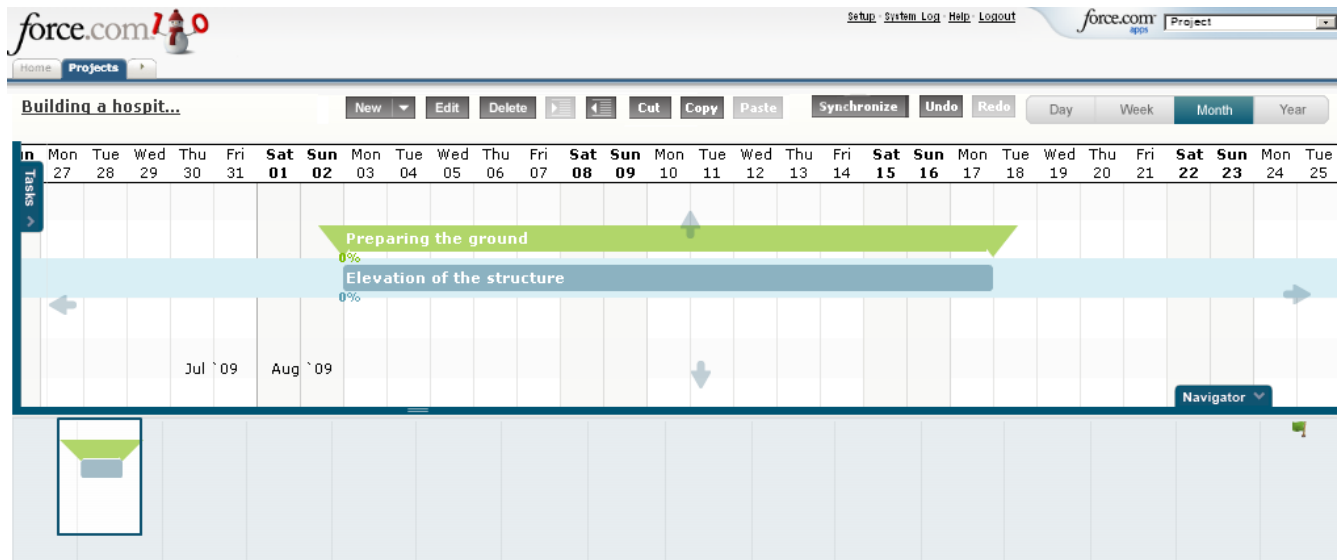
2. Using the left/right indentation button:

With the Indent/outdent buttons will nest your task one level deeper/higher in the hierarchy 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.



Other actions

Click here to paste the last copied task

Click here to copy the selected task

Click here to cut the selected task

Click here to update the timeline

Click here to Undo/Redo changes

Home Projects

Building a hospital

New Edit Delete

Cut Copy Paste

Synchronize Undo Redo

Tasks

Project

Members

ed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
8	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	01	02	03	04	05	06	07	08	09
Preparing the ground																																
50%																																