

# 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 is a navigation bar with the Salesforce logo, a user profile icon, and links for Setup, System Log, Help, and Logout. A dropdown menu for 'Project' is visible. Below the navigation bar, the 'Projects Overview' section is highlighted. On the left sidebar, there are two main sections: 'My Upcoming Tasks' (labeled 4) and 'My Upcoming Milestones' (labeled 5). The 'My Upcoming Tasks' section shows two tasks: 'Preparing the ground' (overdue by 77 days) and 'Elevation of the str...'. The 'My Upcoming Milestones' section shows one milestone: 'Finish the building' (due in 357 days). The main content area features three tabs: 'My Projects' (labeled 1), 'New Projects' (labeled 2), and 'All Projects' (labeled 3). A 'Find Projects' search bar (labeled 6) is located above the tabs, with a 'Search' button and a 'Task ID' field. A 'Create New Project' button is also present. Below the tabs, a filter section shows 'ALL' selected, followed by a list of letters A-Z. A project titled 'Building a hospital' is displayed, showing 3 Tasks, 1 Milestones, and 1 Members. Navigation links for 'Previous Page (1 - 1)' and 'Next Page' are visible. The footer contains 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.

**Project Edit**  
New Project

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  
- High  
- Medium  
- Low

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

Days in a work week: 5 | 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  
...

Working hours: 8 | 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 Access to the new Project  
- Open  
- Closed  
- Private

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 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'. Red arrows and callout boxes highlight the 'New Task' link in the sidebar and the 'Click here to create a new Task' callout in the 'All Tasks' section.

**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 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**

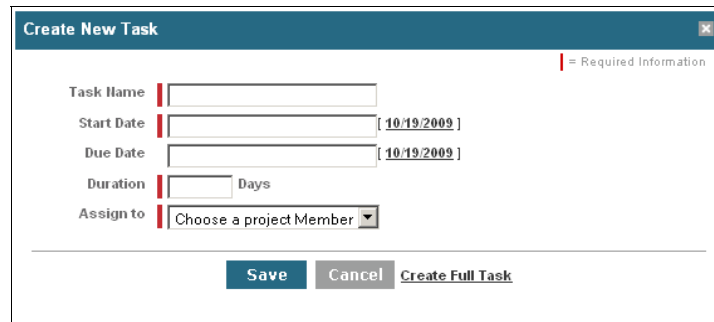
No Attachments Yet

[Attach a new file](#)

Home | Projects | All Tabs

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## Create new Task (Overlay)



**Create New Task** [X]

= Required Information

Task Name [ ]

Start Date [ ] [10/19/2009]

Due Date [ ] [10/19/2009]

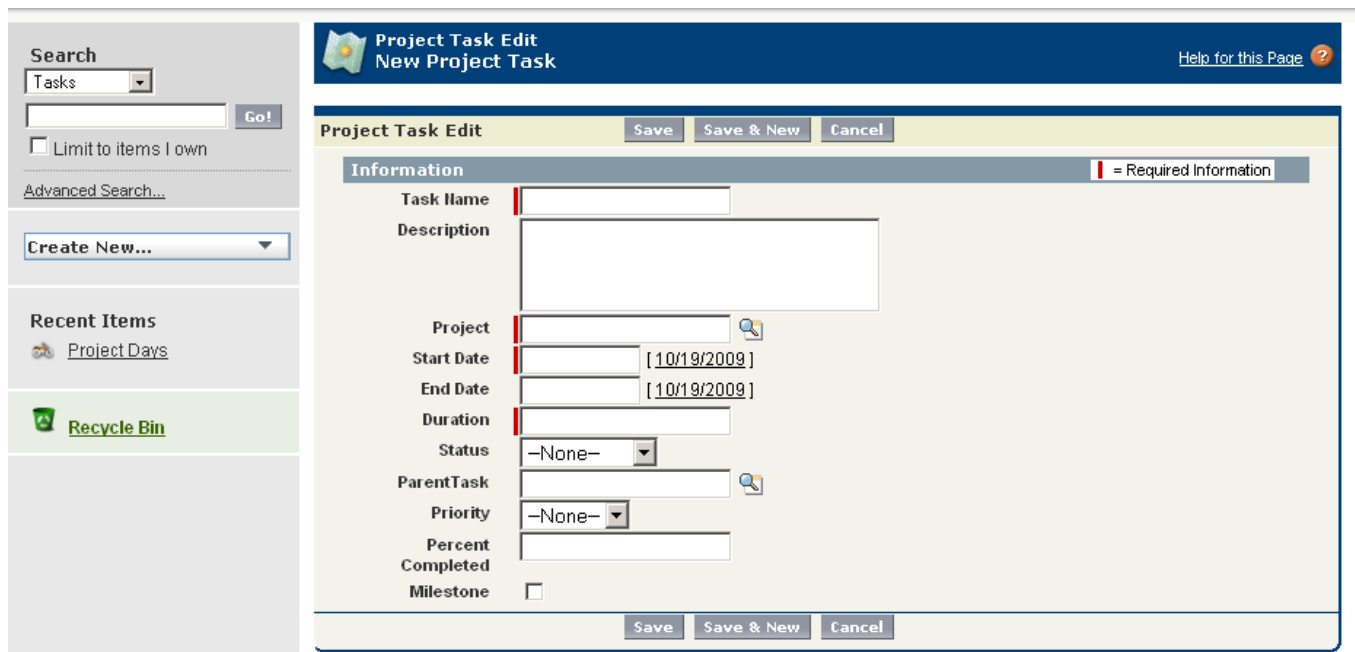
Duration [ ] Days

Assign to [ Choose a project Member ]

[ Save ] [ Cancel ] [ Create Full Task ]

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

## Create full Task



**Search**  
Tasks [ ] [ Go! ]  
☐ Limit to items I own  
[Advanced Search...](#)  
**Create New...** [ ]

**Recent Items**  
 [Project Days](#)  
 [Recycle Bin](#)

**Project Task Edit** [ Save ] [ Save & New ] [ Cancel ]

**Information** [ ] = Required Information

Task Name [ ]

Description [ ]

Project [ ] [ ]

Start Date [ ] [10/19/2009]

End Date [ ] [10/19/2009]

Duration [ ]

Status [ -None- ]

ParentTask [ ] [ ]

Priority [ -None- ]

Percent Completed [ ]

Milestone ☐

[ Save ] [ Save & New ] [ Cancel ]

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

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

**Search**

Tasks

☐ 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** I = Required Information

**Task Name**  **Write the name of the new Task**

**Description**  **Write the description of the new Task**

**Project**  **Select the Project where you are.**

**Start Date**  [10/19/2009] **Select the Start and End date of the task**

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

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

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

**ParentTask**  **Converts the Task in Milestone**

**Priority**  **Select the priority of the Task:**

**Percent Completed**  **Enter the percent completed of the Task**

**Milestone** ☐

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

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

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## 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

The screenshot displays the Salesforce ProjectForce interface. At the top, the 'force.com' logo is on the left, and navigation links 'Setup', 'System Log', 'Help', and 'Logout' are on the right. A search bar with 'Project' is also present. Below the header, the 'Project Detail' section for 'Building a hospital' is shown. It includes a 'Find Tasks' button, a 'Search' button, and a 'TaskID' field. A yellow callout box points to 'Delete', 'Edit', and 'Unjoin' buttons, stating: 'Click on these buttons to Delete or Edit the Project.' Another yellow callout box points to the 'Unjoin' button, stating: 'Click here to Unjoin of the Project. (Not will be more a Member of the Project)'. The project details include: 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 AM), and Last Modified By (Jose Iglesias, 10/19/2009 6:26 AM). The 'Project Quick Links' sidebar on the left includes links for 'New Task', 'New Milestone', 'Timeline', 'Task List', and 'Member List'. The 'Project Subscriptions' section has a 'Manage Subscriptions' link. The 'Project Members' section shows 'Jose Iglesias' with a 'See More' link. The 'All Tasks' section lists two tasks: 'Preparing the ground' (76 days late, due 8/4/2009) and 'Elevation of the structure' (due 11/17/2009), both assigned to Jose Iglesias. A yellow callout box points to the task name, stating: 'Click here to go to Task Details'. The 'Milestones' section shows a milestone 'Finish the building' assigned to Jose Iglesias. A yellow callout box points to the milestone name, stating: 'Click here to go to Milestone Details'. The 'Attachments' section shows an attachment 'Hospital plans.jpg' (36,330 Kb, created 10/19/2009 6:49 AM) by Jose Iglesias. A yellow callout box points to the attachment name, stating: 'Click here to download attached file'. Another yellow callout box points to the 'New Attachment' button, stating: 'Click here to add new attachment'. At the bottom, there are links for 'Home', 'Projects', and 'All Tabs', and a copyright notice: 'Copyright © 2000-2009 salesforce.com inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance'.

force.com 100

Setup · System Log · Help · Logout

force.com apps Project

Home Projects

Project 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 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

Project Quick Links

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

Project Subscriptions

[Manage Subscriptions](#)

Project Members

New | See More»

Jose Iglesias

All Tasks

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

Task Information Assignee Priority Status Percent Complete

Preparing the ground Jose Iglesias Medium Open 0%

76 days late, due 8/4/2009

Elevation of the structure Jose Iglesias Medium Open 0%

due 11/17/2009

Click here to go to Task Details

Milestones

New | Timeline | See More»

Milestone Information Assignee Date

Finish the building Jose Iglesias

Click here to go to Milestone Details

Attachments

New Attachment

Delete 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 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.

The screenshot shows the Force.com interface for a task detail. The top navigation bar includes the Force.com logo, a user profile icon with a '10' badge, and links for Setup, System Log, Help, and Logout. Below this is a breadcrumb trail: Overview > Building a hospital > Tasks List > Preparing the ground. The left sidebar contains 'Project Quick Links' (Timeline, Task List, Member List, All User Tasks) and a 'Members Widget' showing 'Jose Iglesias'. The main content area displays task details for 'Preparing the ground' (Id #24075). It includes fields for Task Name, Description, Project, Start Date, End Date, Duration, Status, Parent Task, Priority, Percent Completed, Milestone, Created By, Last Modified By, Status (with a progress bar), Files, Assigned To, Notes, and Comments. Action buttons at the top and bottom of the task details include 'Edit Task', 'Mark Complete', 'Delete', and 'PDF Export'. The bottom of the page features a footer with 'Home | Projects | All Tabs' and a copyright notice for 2000-2010 salesforce.com, inc.

force.com  10

Setup • System Log • Help • Logout

force.com apps Force.com

Home Projects

Project Building a hospital

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

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

Parent Task


Priority Medium


Percent Completed 50.00%

Milestone ☐


Created By Jose Iglesias, 3/15/2010 6:15 AM

Last Modified By Jose Iglesias, 3/15/2010 6:15 AM

Status 50% 

Files  Add New Attachment

Assigned To Jose Iglesias

Notes  Edit Notes

Comments

Save Comment

Edit Task Mark Complete Delete PDF Export

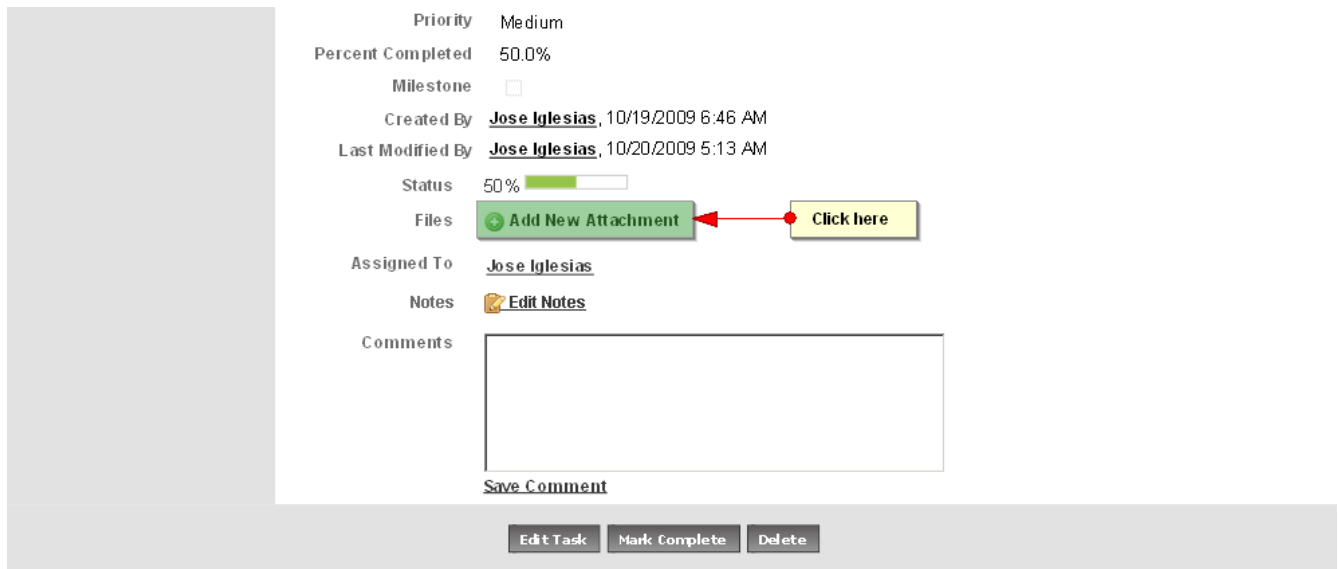
Home | Projects | All Tabs

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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.

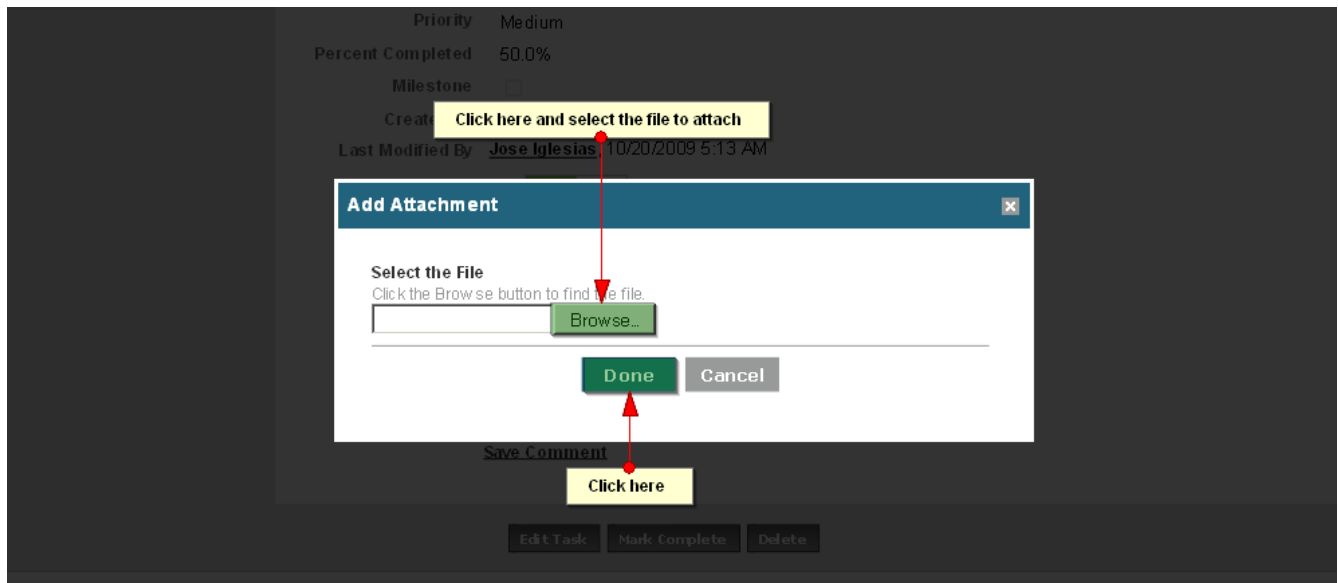


The screenshot shows a task details page with the following fields and values:

- 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 'Click here' callout)
- 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:

- 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
- Files: [Add New Attachment](#) (highlighted with a red arrow and a 'Click here' callout)
- Assigned To: [Jose Iglesias](#)
- Notes: [Edit Notes](#)
- Comments: [Save Comment](#)

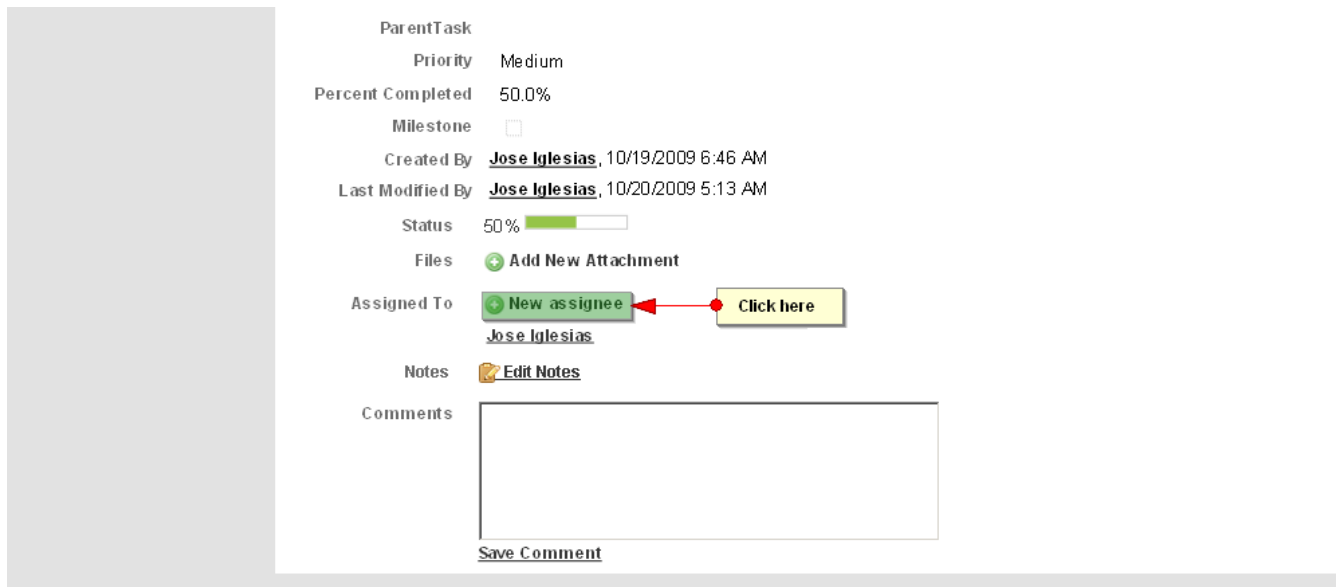
The 'Add Attachment' dialog box is open, showing the 'Select the File' section with the instruction 'Click the Browse button to find the file.' The 'Browse...' button is highlighted with a red arrow and a 'Click here' callout. The 'Done' button is also highlighted with a red arrow and a 'Click here'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

The file is added in the task or milestone.

## Add Assignees

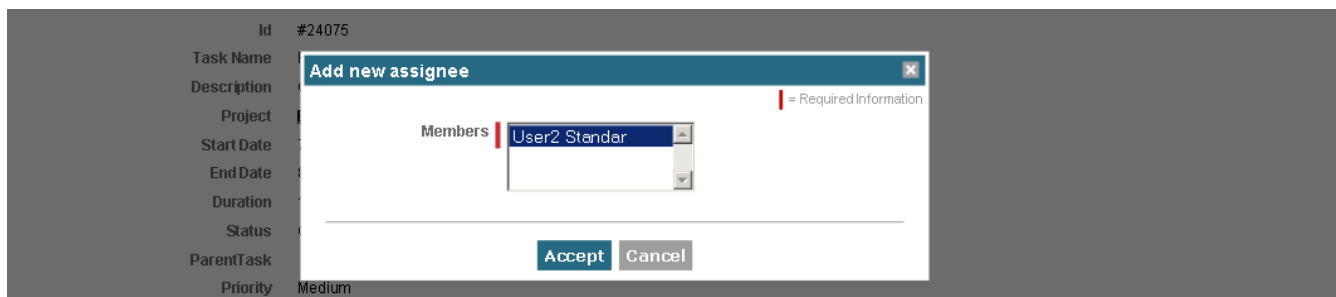
You can add Assignees to the task or milestone. To do this make the following steps.

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.

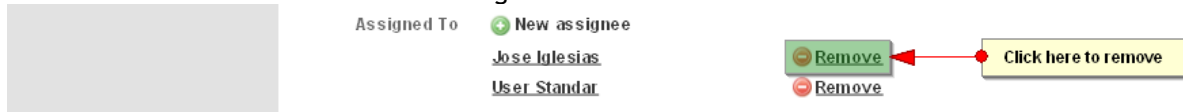
2. Select a member and click on Accept button. If you want to add more than one assignee, select them (multiselect) and click on Accept button.



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 shows 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'. A red arrow points from a yellow callout box labeled 'Click here to remove' to a 'Remove' button (with a minus icon) next to 'User 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. On the left, there are sections for 'Status' (50% progress bar), 'Files' (+ Add New Attachment), 'Assigned To' (+ New assignee, listing Jose Iglesias and User1 Standar with Remove buttons), and 'Comments'. The 'Comments' section has a text box containing 'This is a comment.' and a 'Save Comment' button. A callout box 'Write your comment of the task here' points to the text box. Another callout box 'Click here' points to the 'Save Comment' button. At the bottom, there are buttons for '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, but now the comment has been saved and is displayed in a green box. The comment text is 'Created By Jose Iglesias, Tue Oct 20 12:58:03 GMT 2009' followed by 'This is a comment.' and a 'Delete Comment' button. A callout box 'This is the newly added comment' points to the comment box. Another callout box 'Click here to delete the comment' points to the 'Delete Comment' button. The 'Save Comment' button is now a link. At the bottom, there are buttons for 'Edit Task', 'Mark Complete', and 'Delete'.

## 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](#)
- [User 1 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](#)
- [User 1 Standar](#) [Remove](#)

The diagram illustrates the relationship between the Notes and Comments sections. A yellow box labeled "Click here" is positioned above the Comments section, with a red arrow pointing to the "Edit Notes" button in the Notes section. The Comments section is shown below the Notes section, with a "Save Comment" button at the bottom.

**force.com**  Setup • System Log • Help • Logout

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**

**Task Notes**

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

Source |                   abc

X<sub>2</sub> X<sup>2</sup> |                   

Styles Format Font Size

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

Save Save & Exit Cancel



## Tasks and Milestones List

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

force.com 100

Setup · System Log · Help · Logout

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

Home | Projects | All Tabs  
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## User Tasks

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

force.com 100

Setup · System Log · Help · Logout

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

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 Salesforce Project Overview page. 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 search bar with the placeholder text 'Write a part of the project name you want to find here'. The main header has 'Projects Overview' and a 'Find Projects' button. A search input field contains the word 'hospital', and a 'Search' button is next to it. To the right of the search bar is a 'Task ID' field and a 'Go' button. Below the search bar, there are tabs for 'My Projects', 'New Projects', and 'All Projects', along with a 'Create New Project' button. A filter section shows 'ALL' selected, with a list of letters A through Z. Below the filter, there's a project card for 'Building a hospital' with 3 tasks, 1 milestone, and 1 member. The left sidebar contains 'My Upcoming Tasks' (with 'Preparing the ground' overdue) and 'My Upcoming Milestones' (with 'Finish the building' due in 358 days). The footer includes 'Home | Projects | All Tabs' and copyright information.

The screenshot shows the Salesforce Project Search results page. The navigation bar is the same as the previous page. The main header has 'Project Search' and a 'Find Projects' button. The search input field still contains 'hospital', and the 'Search' button is present. To the right of the search bar is a 'Task ID' field and a 'Go' button. Below the search bar, there's a results section. It starts with 'Results 1 - 1 of 1 for "hospital"' and a pagination bar showing 'Previous Page | Next Page'. Below this, there's a project card for 'Building a hospital' with the text 'In this project ....'. Below the project card, there's another results section with 'Results 1 - 1 of 1 for "hospital"' and a pagination bar showing 'Previous Page | Next Page'. The left sidebar is the same as the previous page. The footer includes 'Home | Projects | All Tabs' and copyright information.

## 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 and milestones for the project. The task "Preparing the ground" is highlighted. The task details are as follows:

Field	Value
Id	#6959
Task Name	Preparing the ground
Description	
Project	<b>Building a hospital</b>
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 tasks and milestones for the project. The task "Preparing the ground" is highlighted. The task details are as follows:

Field	Value
Id	#6959
Task Name	Preparing the ground
Description	
Project	<b>Building a hospital</b>
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

## 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, '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 includes a section for selecting email alerts. 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)

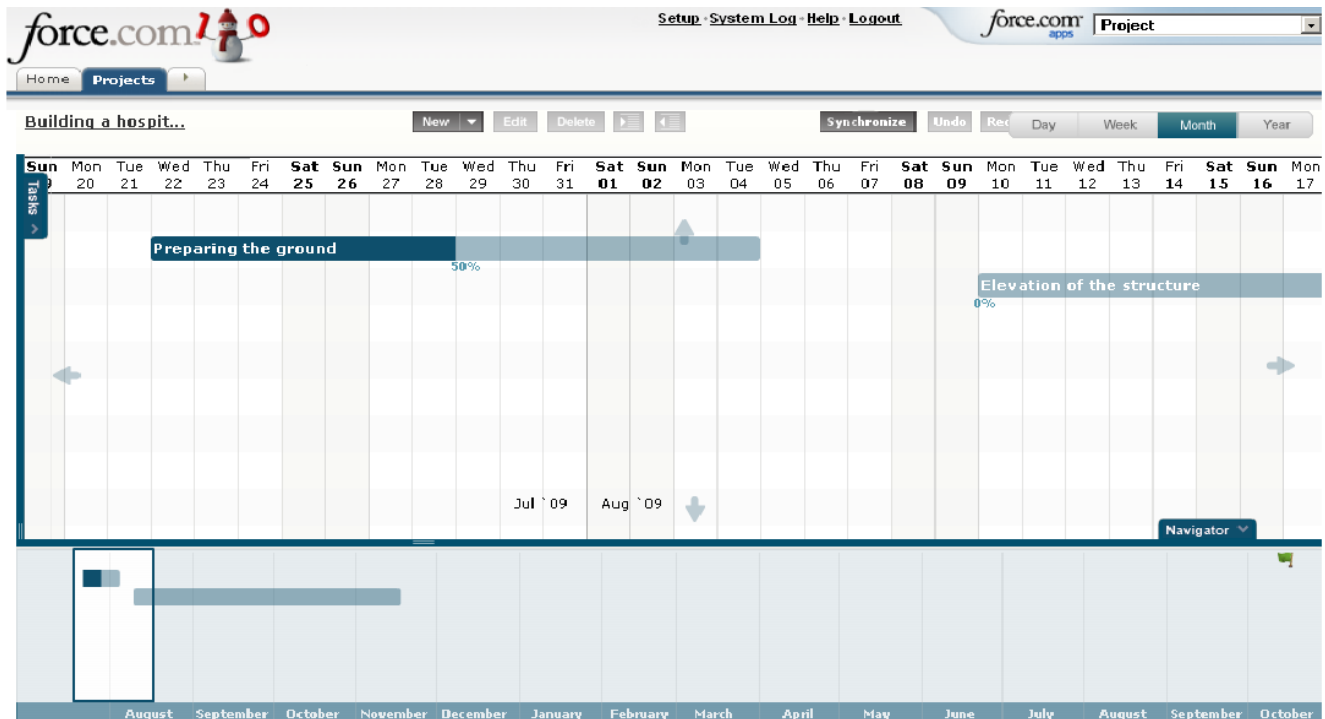
The Project timeline shows all the tasks in a dynamic interface in which users can interact with them.

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.

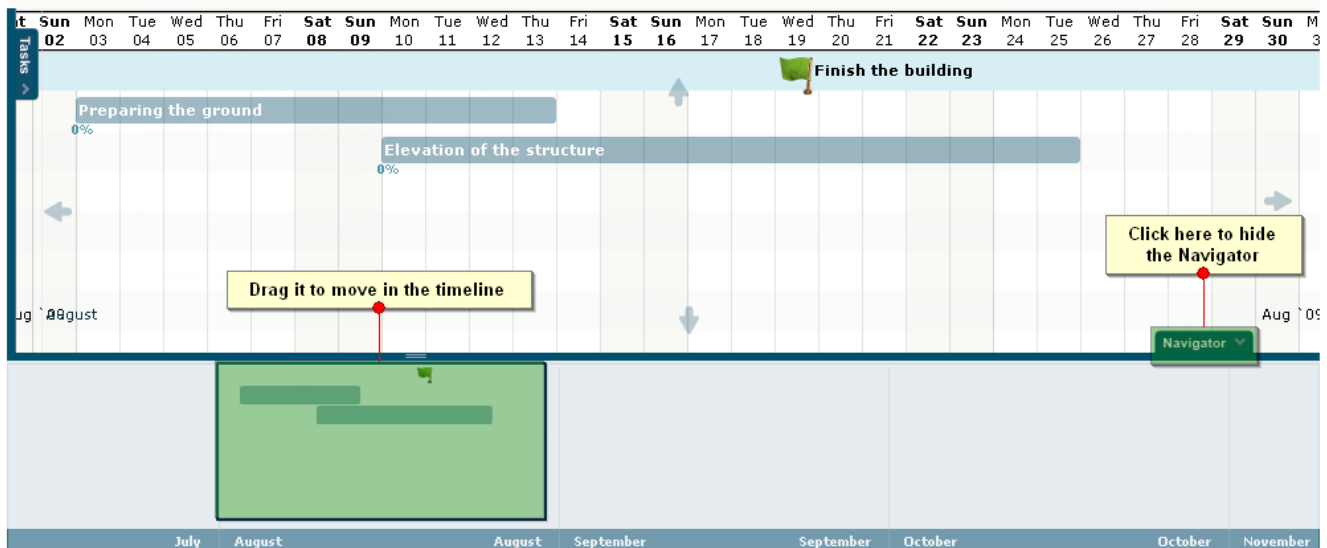
For drag the task or milestones you have to select the task, press the left button of the mouse, hold the left mouse button pressed, move the task to the right or left, and place it in the desired date.

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 'Home' and 'Projects' tabs, and a right sidebar with 'Tasks', 'Project', and 'Members' views. A calendar view at the bottom shows the month of January 2010.

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 'force.com' interface after a new task has been 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...
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	

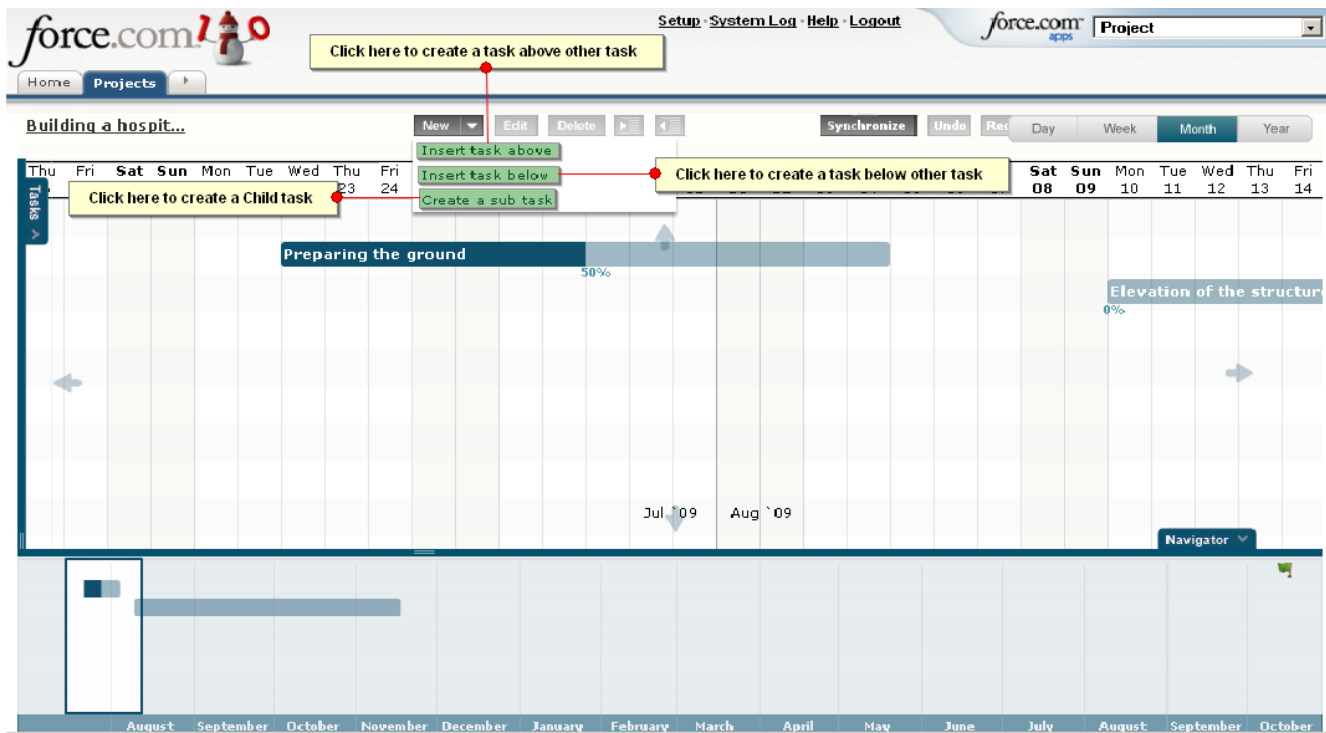
The interface is identical to the previous screenshot, but the calendar view at the bottom now shows the month of February 2010, indicating the task was created on the current date.



## 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

Task Name

Description

Start Date04/14/2010[04/14/2010]

End Date04/14/2010[04/14/2010]

Duration1Days

StatusOpen

PriorityMedium

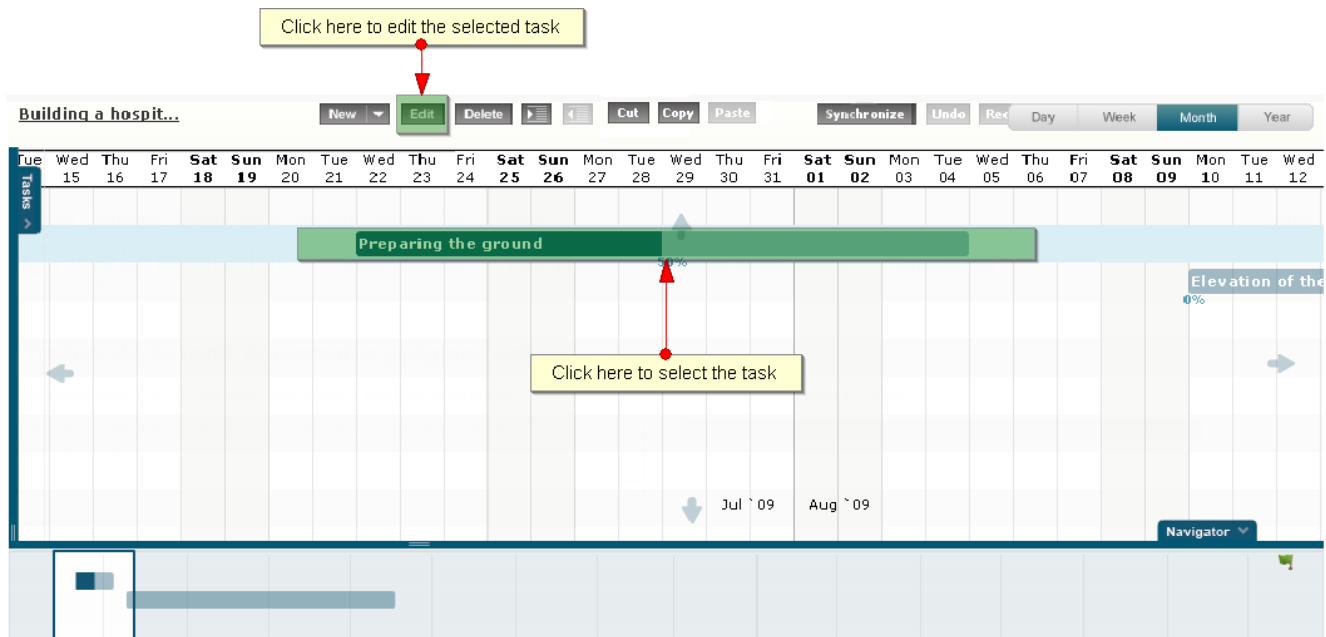
Percent Completed

Milestone

SaveCancel

## Edit tasks

You must have a selected task to editing.



Edit Task

Details

Task Links

Assignees

Task Name

Preparing the ground

Description

Get the materials to prepare the ground

Start Date

04/05/2010

[04/14/2010]

End Date

04/16/2010

[04/14/2010]

Duration

10

Days

Status

Open

ParentTask

Priority

Medium

Percent Completed

50

Save

Cancel

Create/Edit task has three tabs:

– Tab Details

**Create Task**

Details Task Links Assignees

■ = Required Information

Task Name

Description

Start Date  [04/14/2010]

End Date  [04/14/2010]

Duration  Days

Status

Priority

Percent Completed

Milestone ☐

Save Cancel

**Callouts:**

- Write the name of the task (points to Task Name)
- Write the description of the task (points to Description)
- Select the Start and End date (points to Start Date)
- Enter the duration of the task (in this project appears in days) (points to Duration)
- Select the Status of the task (points to Status)
- Select the Priority of the task:
  - High
  - Medium
  - Low
 (points to Priority)
- Write the Percent completed of the task (points to Percent Completed)
- Transform the task into a milestone (points to Milestone)

– Tab Task Links

**Create Task**

Details Task Links Assignees

**Callouts:**

- Select the Lag (in this case is on Days) (points to Lag)
- Select the Unit (points to Unit)
- Select the Type of the Task Link.
  - Finish to Start
  - (When finishes one task, begins the other task)
 (points to Type)
- Click here to delete the Task Link (points to Delete button)
- Select the task that will be linked (points to 'Choose a task.' dropdown)
- Click here to add another (points to 'Add New Task Link' button)

Save Cancel

– 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

Tasks

Pre est

Members

July

Navigator

July August August September September October October November

## Tab Project

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

Home Projects

**Building a hospital** New Edit Delete Cut Copy Paste Synchronize Undo Redo

**Project Information**

Project Name Building a hospital

Description In this project ...

Priority High

Display Duration Days

Days in a work week 8

Working hours 5

Image

Feb '10 Mar '10

Tasks Project Members

## Tab Members

In this Tab appears the information of all the Project Members.

Select a member of the list to see your information.

To add a new member:

- Write the name in the “Find” field
- Click on the button right to the field

To delete any member just click on “Trash” button beside him.

You must click on Save button to update any change.

Home Projects

**Building a hospital** New Edit Delete Cut Copy Paste

**Find**

First Name

Last Name

Company

Title

Profile

Project Owner

Member since

**Project Members**

Name

Jose Iglesias

User2 Standar

Save Cancel

Mon 22 Tue 23 Wed 24 Thu 25 Fri 26

Tasks Project Members

## 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 'Assign To' field is set to 'Jose Iglesias (0%)'. The 'Completed' field is set to '51%'. The 'Duration' is '7 Days'. The 'Start Date' is '08/07/2009' and the 'Due Date' is '08/17/2009'. The 'Priority' is 'Medium'. The 'Is milestone?' checkbox is unchecked. The 'Description' field is empty. The 'Name' field is 'Elevation of the structure'. The 'Parent' field is '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' dropdown menu is open, showing a list of tasks: 'none', 'Finish the building', 'Preparing the ground', and 'NEW TASK'. The 'Assign To' field is set to 'Jose Iglesias (0%)'. The 'Completed' field is set to '51%'. The 'Duration' is '7 Days'. The 'Start Date' is '08/07/2009' and the 'Due Date' is '08/17/2009'. The 'Priority' is 'Medium'. The 'Is milestone?' checkbox is unchecked. The 'Description' field is empty. The 'Name' field is 'Elevation of the structure'. The 'Parent' field is 'Select a task'.

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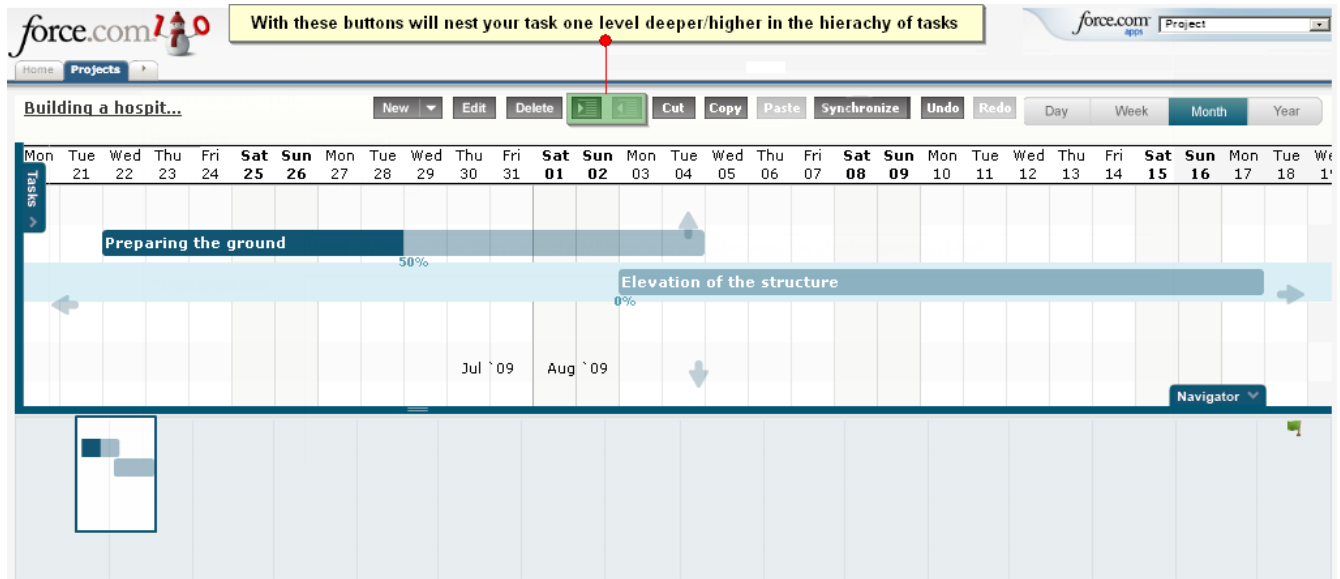
5. Click on Save button.

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.

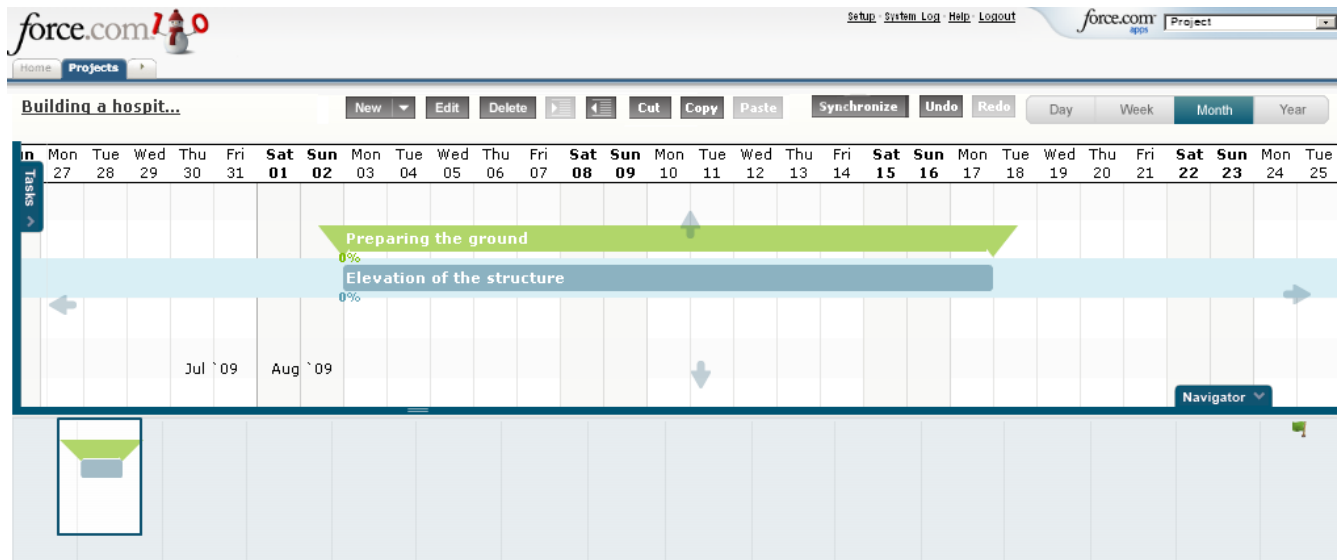
## 2. Using the left/right indentation button:

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.



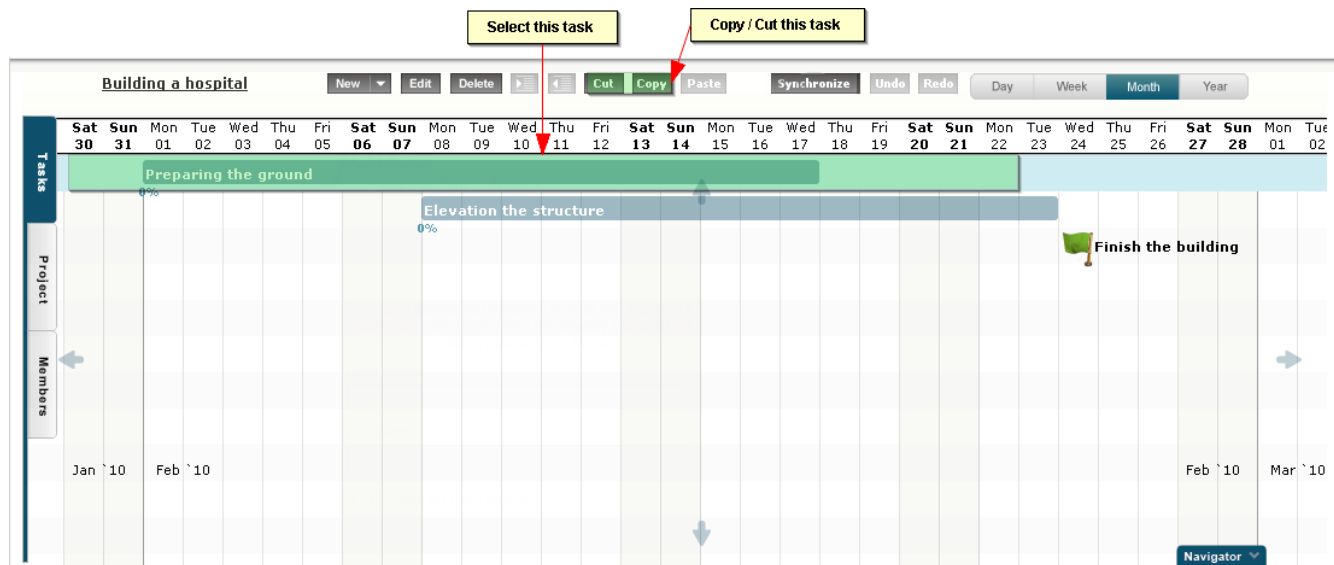
The selected task in the step 1, is now child of the task above. The parent task change the color to green and is resized to fit the child task.





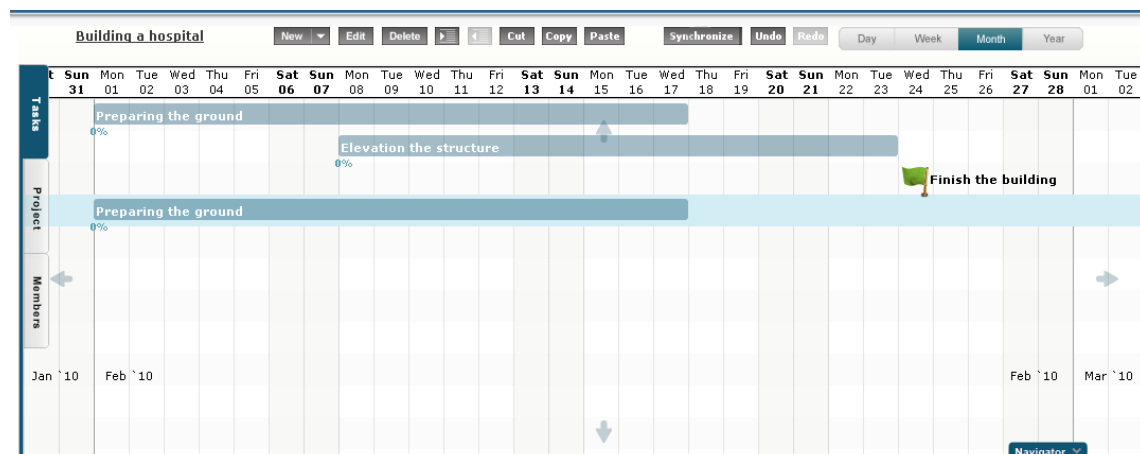
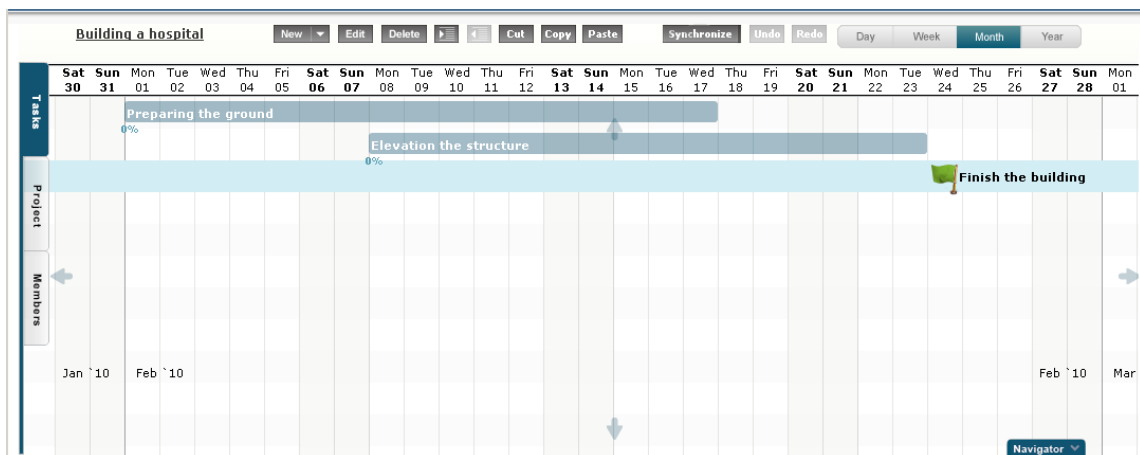
## Cut - Copy - Paste

To copy or cut any task, you must have it selected.



Suppose we copy the task. If you use the Paste button, this task is pasted below the selected.

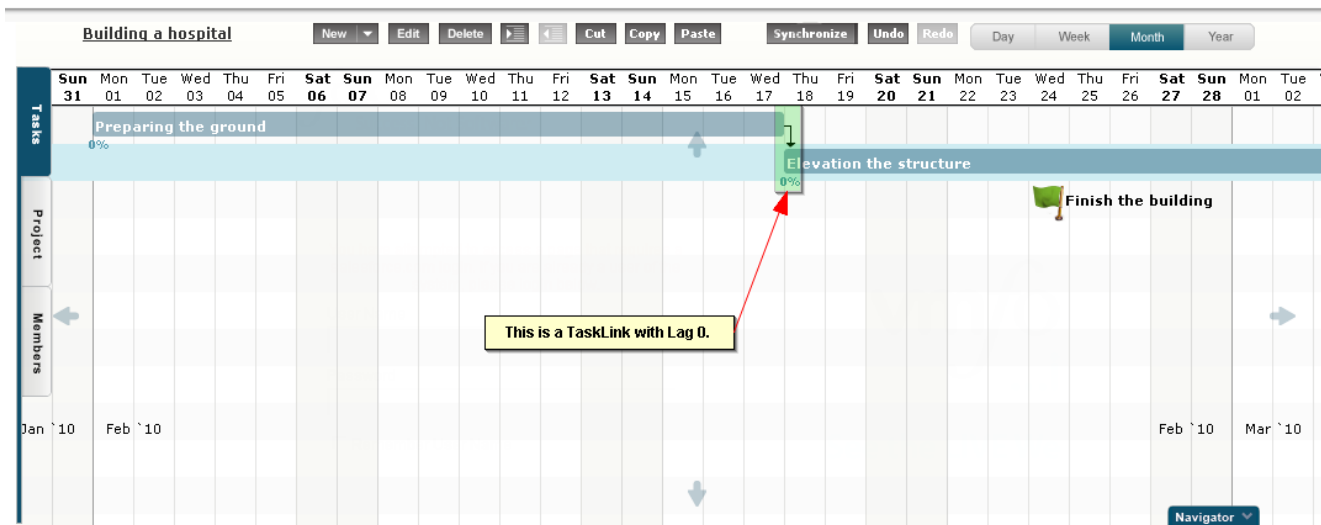
Now I select the milestone and then click on Paste button.



## Create a Task Link

To create a task Link you can drag a task onto another.

Another way to doing this is in the editable mode of the task (Task Links tab)



Lag: Minimum distance between the ending of a task and the beginning of the other.

## Other actions

