
Installation Guide

Cloud Coach Fundamentals

Project Management for Salesforce



How to Navigate this Installation Guide

1. This installation guide is designed to walk users through the necessary steps of installing, configuring, and setting up Cloud Coach Fundamentals.
2. Each section contains several clickable links:
 - a. *Knowledge Base Links* (Our Cloud Coach knowledge base is a resource we provide to all our customers to assist with technical set-up and configurations)
 - b. *YouTube Videos* (Short instructional videos to reference in addition to the knowledge base articles)
3. Follow this installation guide by utilizing all the resources included to successfully install and configure Cloud Coach Fundamentals

Downloading and Installing Cloud Coach Fundamentals

Overview

Whether you're focused on customer on-boarding, consulting, implementations, marketing campaigns, or any other type of projects, Cloud Coach Fundamentals makes project management easy.

1. Find the Fundamentals listing on AppExchange: [Get It Now](#)
2. Install the package in your desired Org:
 - a. Installation questions? Check out [Salesforce's Application Installation Guide](#)
 - b. License questions? Check out [Salesforce's Assign Licenses for Managed Packages](#)
3. Resources for self-installation:
 - a. [Knowledge Base](#)
 - b. [Weekly Webinar](#)
 - c. [Website](#)
 - d. [Getting Started Page](#)

Assigning Permission Sets

Overview

In order for the users in an organization to use Cloud Coach Fundamentals, they must have a permission set assigned. There are two ways to add users to Cloud Coach Fundamentals; (1) from an individual user's profile, or (2) bulk assign them from the permission set itself. Assigning permission set(s) to a user allows them to create projects and templates, manage tasks with My Assignments, monitor the Gantt views, or have admin privileges.

1. Cloud Coach Fundamentals Permission sets:
 - a. *CCMI | Admin Permissions* - allows users to go to getting started and access sample data
 - b. *CCMI | Minimum User Permissions* - allows users to create projects and templates, manage tasks with My Assignments, and monitor the Gantt views
2. To assign permission sets by the individual user, go to Setup → Users → Select an Individual to edit
 - a. Scroll down to Permission Set Assignments and click Edit Assignments
 - b. Select the permission set(s) from the Available Permission Sets for the user, click Add so they display in the Enabled Permission Sets.
 - c. Click Save
3. To assign permission sets in bulk, go to Setup → Permission Sets → Select CCMI | Admin Permissions or CCMI | Minimum User Permissions
 - a. Scroll down to System Permissions and click to edit
 - b. Click Manage Assignments → Add Assignments → Select Users
 - c. Click Assign

Knowledge Base

1. [Assign Permission Sets](#) [Article ~2 minutes]
2. [Adding Users](#) [Video ~3 minutes]

Building a Cloud Coach Project

Overview

A new project in Cloud Coach is created at the click of a button. Whether it's created from scratch or from a template, the project can be customized with tasks, subtasks, dependencies, start dates, and resource assignments. Projects can be saved as a template to be re-used as needed. One of the great aspects of the Salesforce platform is the variety of tools that can be leveraged to automate key business processes. With Cloud Coach, we provide you with invocable code to make automating project creation a snap.

Knowledge Base

1. [Creating a Project or Template](#) [Article ~3 minutes]
2. [Project Creation](#) [Video ~3 minutes]
3. [Editing a Project or Template](#) [Article ~2 minutes]
4. [Auto Creating Projects](#) [Article ~4 minutes]
5. [Add Create Project Button to Opportunities](#) [Article ~1 minute]
6. [Automating Project Creation](#) [Video ~8 minutes]

Additional Configuration for Field Sets

Overview:

Cloud Coach makes use of Field Sets, allowing each org to customize what data is shown and where. Field Sets allow for different combinations of Fields to be displayed and can be both Managed and Custom Fields on the Managed Objects. They're easy to edit and do not require custom coding knowledge to use, making them a great solution to allow admins to make a change on the fly to improve views for Users. *Though the Field Sets for External Project View, Time Entry, and Timecard are listed on Fundamentals objects, access is limited to customers who have purchased the Professional upgrade from Fundamentals.*

1. Field Sets on the Project Object (CCMI_Milestone_Project__c):
 - a. *Column Headers - (CCMI_column_headers)*
 - i. Controls the Column Headers for the Project List View on the Cross Project Gantt
 - b. *Gantt - (CCMI_gantt)*
 - i. Deprecated; Field set no longer applicable
 - c. *New Project - (CCMI_new_task)*
 - i. Controls Fields in the Project Creation Wizard for new Projects and Templates
 - d. *Side Panel - (CCMI_sidepanel)*
 - i. Controls the Fields in the Side Panel for the Project on the Cross Project Gantt View
2. Field Sets on the Project Task Object (CCMI__Milestone_Task__c):
 - a. *Column Headers - (CCMI__column_headers)*
 - i. Controls the Column Header Fields for the list view on the My Assignments page
 - b. *New Task - (CCMI__new_task)*
 - i. Controls the Fields in the modal when creating a new Task
 - c. *Side Panel - (CCMI__sidepanel)*

- i. Controls the Fields displayed in the side panel of a Task
- d. *Timelines - List - (CCMI__timelines_list)*
 - i. Controls the Column Headers for the list view on Project Timelines List View

Knowledge Base

1. [Field Sets in Cloud Coach](#) [Article ~2 minutes]

Additional Resources

Overview

This section contains resources for reports and dashboards, ways to add more detail to projects and tasks, and more information on Cloud Coach's several views.

Knowledge Base

1. [Create a Project Health Traffic Light](#) [Article ~3 minutes]
2. [Alerting Users that their Task is Due to Start](#) [Article ~3 minutes]
3. [Task Assignment](#) [Article ~3 minutes]
4. [Customize Tabs](#) [Article ~2 minutes]
5. [Project Timelines View](#) [Article ~5 minutes]
6. [Project Timelines View](#) [Video ~6 minutes]
7. [Cross Project View](#) [Article ~5 minutes]
8. [Cross Project View](#) [Video ~4 minutes]
9. [Project Documents View](#) [Article ~3 minutes]
10. [Project Documents View](#) [Video ~2 minutes]
11. [Project Resources View](#) [Video ~4 minutes]
12. [Project Summary View](#) [Video ~2 minutes]
13. [My Assignments](#) [Article ~6 minutes]
14. [My Assignments](#) [Video ~2 minutes]