Installation Guide

Cloud Coach Professional

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 Professional.

2. Each section contains several clickable links:

   a. *Walk-through Videos* (Short sections from a 7 part video series covering the start to finish process of installing and configuring Cloud Coach Professional)

   b. *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)

   c. *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 Professional

Downloading and Installing Cloud Coach Professional

Overview

Cloud Coach Professional builds upon & adds to the great capabilities that you get with our always FREE Fundamentals tier, putting you in the driver's seat to Project Success.

1. Find the Professional listing on AppExchange: [Get It Now](#)

   a. If you have <u>NOT</u> installed Cloud Coach Fundamentals yet, make sure you install that package <u>BEFORE</u> installing Cloud Coach Professional

      i. Download Cloud Coach Fundamentals: [Here](#)

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. [Walkthrough Playlist](#)

Walkthrough Video

1. [Downloading and Installing Cloud Coach Professional](#) [Video ~5 minutes]

Assigning Permission Sets

Overview

In order for the users in an organization to use Cloud Coach Professional, they must have a permission set assigned. There are two ways to add users to Cloud Coach Professional; (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. In Professional, users are also granted access to Phases, Time Entries, and Timesheets.

1. Cloud Coach Professional 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

   c. *CCPR | Minimum User Permissions* - grants access to Phases, Time Entries and Timesheets

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

Walkthrough Video

1. Assigning Permission Sets [Video ~3 minutes]

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 invokable code to make automating project creation a snap.

Walkthrough Video
1. [Creating, Templatizing, and Automating Project Creation](#) [Video ~15 minutes]

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

    e. *Site - (CCMI_external)*

        i. Controls the Fields on the Summary Page of the External Project View

    f. *Timecard Project Assistant - (CCMI_timecard_project_assistant)*

        i. Controls the column headers for the Project assistant tab in the time section of My Assignments

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

    e. *Phase View - (CCMI_new_task)*

        i. Controls the Fields in the Column Headers on the Phase View in Timelines

    f. *Site - (CCMI_external)*

        i. Controls the Fields shown on the summary page of the External Project View

3. Field Set on the Time Entry Object (CCMI__Work__c):

    a. *Quick Entry - (CCMI_quick_entry)*

        i. Controls the Fields for creating a time entry in the (1)Side Panel and when using the (2) 'Create Time Entry' button in the Time Section of the My Assignments page

Walkthrough Videos

1. [Configuring the Project](#) [Video ~8 minutes]
2. [Configuring the Project (continued)](#) [Video ~8 minutes]

Knowledge Base

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

Setting Up the External Project View and Timecard

Overview

The External Project View (EPV) is a live, read-only URL that can be provided to anyone with a web browser displaying the latest information pertaining to your Project. A Cloud Coach and/or Salesforce license is not required to view the link. It is commonly used to keep external stakeholders, sponsors, or clients informed with the latest data related to the Project and creates trust with your clients by providing transparency with your progression. Lastly, it will save time by providing data that would otherwise be a meeting or email correspondence.

Though the *Timecard* can be used effectively without additional configuration, there are options available to customize what and how users interact with it. Buttons for Create Time Entry and Submit For Approval are available to be added to the Timecard page using Custom Settings that are part of the Professional Package.

In order to have *Cloud Coach's 'Genius'* time tracking feature detect the correct changes to selected record fields, you need to enable feed tracking. Users can select up to 20 fields per object to have tracked and every change made to the selected record will be reflected in Cloud Coach's 'Genius' as a reminder to track time.

Walkthrough Videos

1. [External Project View and Timecard Configuration](#) [Video ~13 minutes]

2. [Cloud Coach's 'Genius' and Feed Tracking](#) [Video ~5 minutes]

Knowledge Base

1. [Configure Timecard Time Entry](#) [Article ~1 minute]

2. [Configure Timecard Project Assistant](#) [Article ~1 minute]

3. [Timesheet Approval Process](#) [Article ~2 minutes]

4. [Timecard Custom Settings](#) [Article ~1 minute]

5. [Feed Tracking](#) [Article ~3 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.

Walkthrough Video

1. [Reports and Dashboards](#) [Video ~7 minutes]

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]