

Project Central Help Knowledge Base PDF

**Created on: 07/10/2023 5:04 am
CDT**

Table of Contents

Plan a Project	4
Access Project Central	4
Initiate a Project	9
Plan a Project	10
(Exercise) Plan a Project	11
Manage a Project	12
Collaborate as a Project Team	12
Track and Adjust a Project	14
Close a Project	16
(Exercise) Manage a Project	18
Manage Across Projects	19
Manage Across Tasks	19
Manage Across Projects	20
Manage Across Accounts	21
(Exercise) Manage Across Projects	24
Get Started	25
What is Project Central?	25
Navigating Project Central	26
Getting Started Guide	28
Training	31
Feature Glossary	32
Release Notes	32

Access Project Central

Login Securely to Project Central

You can access Project Central at <https://www.projectcentral.com/login/> and when prompted, enter the same work email credentials that you use to access your organization's Microsoft 365 environment.

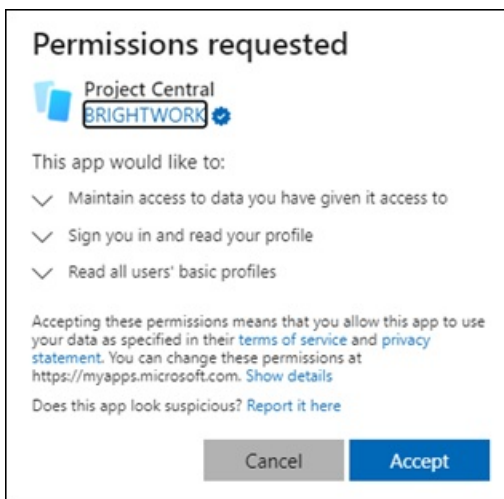


Welcome Back!

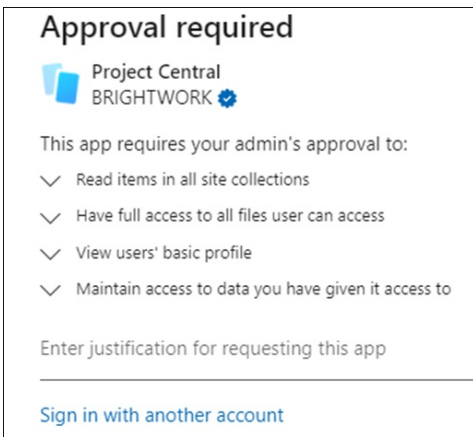
----- Sign in with Microsoft 365 Work Email -----



Since Project Central is a safe and secure environment that uses your existing Microsoft 365 tenant, the first time you access Project Central you'll be presented with a permissions request. Depending on how your organization's infrastructure is setup, you may need the assistance of one of your IT colleagues for the very first login.



In some customer environments Project Central will require additional admin approval.



These permissions are related to Microsoft [Graph permissions](#). Below is an explanation of these additional approval requests:

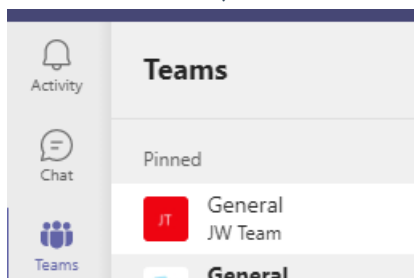
- **Read items in all site collections:** Project Central requires this permission to display a list of sites the user has access to when connecting to a SharePoint library through Project Central. It will only read items the user has permission to access, not all sites and libraries in SharePoint Online. See also [Connect a SharePoint Library](#).
- **Have full access to all files user can access:** Project Central requires this permission to display a list of files the signed-in user has permission to access in SharePoint Online, and allow them to read, create, update and delete files they have access to. See also [Add Files to a Project](#).
- **View users' basic profile:** This is a standard permission required by Azure AD applications that access the Microsoft Graph API. This allows the app to see users' basic profile information including name, picture and user name.
- **Maintain access to data you have given it access to:** This is a standard permission required by Azure AD applications for token exchange. See also [Graph Permissions Reference](#).

Invite Others to Access Project Central

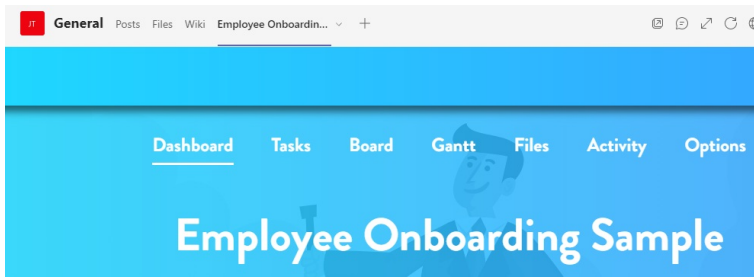
You can invite collaborators from [within your organization](#) as well [external guests](#) to work with you on Project Central projects.

Access Project Central from Microsoft Teams

1. In Microsoft Teams, click on the channel you previously configured to work with your Project Central project.



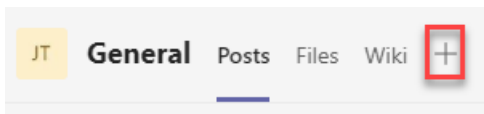
2. Click on the project tab you configured earlier and start using Project Central.



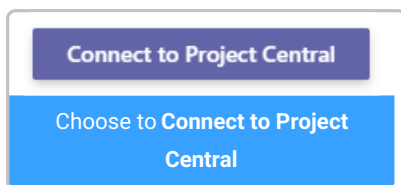
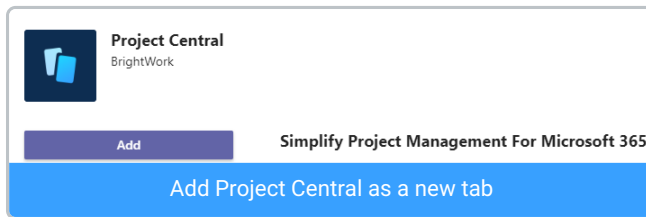
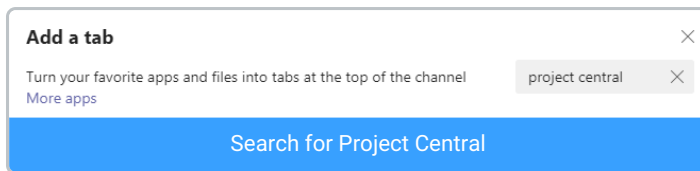
NOTE: Drag and drop on mobile is not supported at this time.

Configure Microsoft Teams Integration

1. Add a new tab from within your Microsoft Teams channel or chat by clicking the "+" icon to the right of your existing tabs at the top of your screen:



2. On the "Add a tab" screen, search for "project central" in the Microsoft Teams App store, and add it as a new tab.



3. You will be prompted to accept a permissions request - accept the request in order to proceed.

Permissions requested



This app would like to:

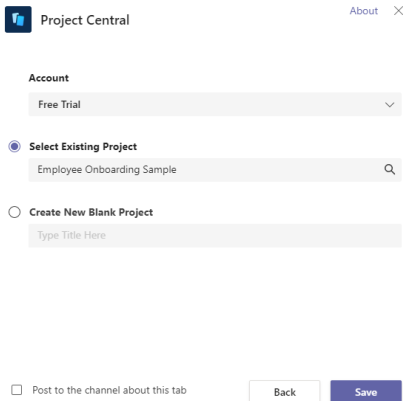
- ✓ Maintain access to data you have given it access to
- ✓ Sign you in and read your profile
- ✓ Read all users' basic profiles

Accepting these permissions means that you allow this app to use your data as specified in their [terms of service](#) and [privacy statement](#). You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

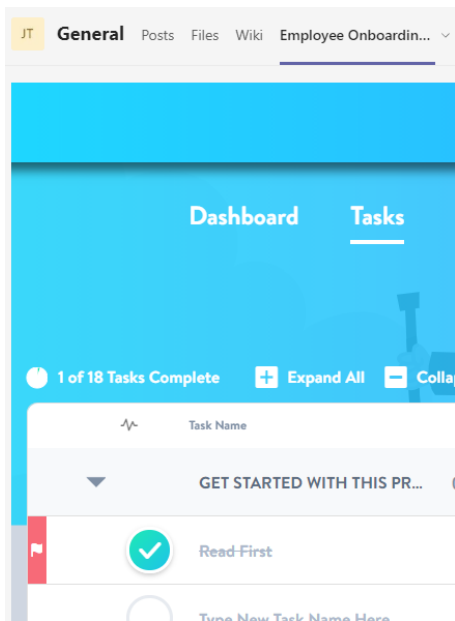
Does this app look suspicious? [Report it here](#)



4. Choose the account you would like to connect Teams to and an existing project (you can click the search icon to get a list of all existing projects), or choose Create New Blank Project, and click Save.

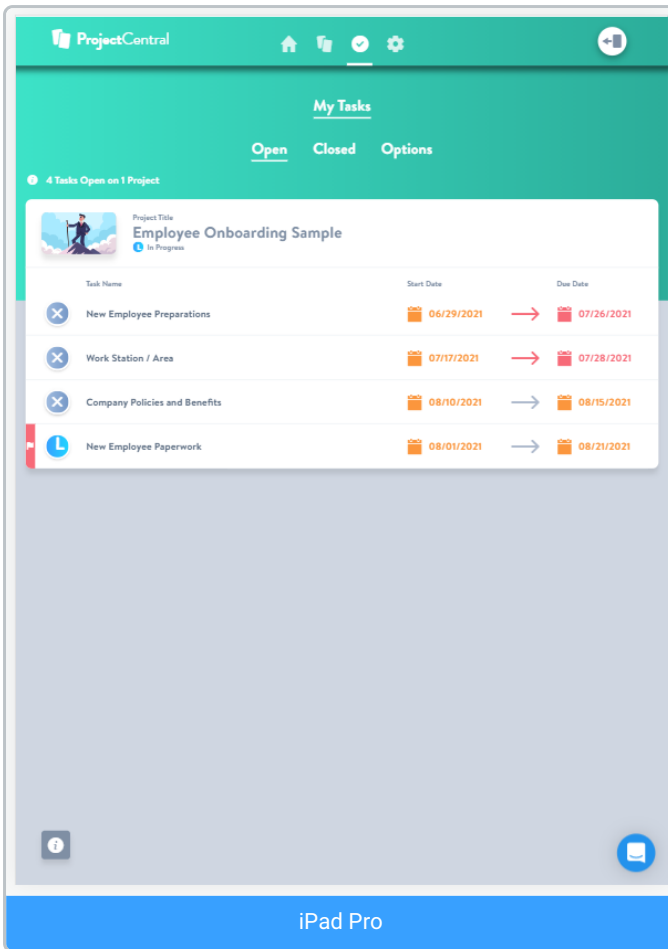


5. Congratulations! You can now manage your Project Central project from within Teams.



Access Project Central from Other Devices

Project Central is fully responsive with Desktop-5K, Desktop-HD, Desktop-SD, Tablet, Tablet-7inch, and is phone responsive for many areas of the app.



Access Tasks on External Calendars

Project Central tasks can also be accessed via [external calendars](#).

What's next?

- [Initiate a Project](#)

Initiate a Project

Tip It is often said that "a good start is half the battle" and so it is with managing a project. It can be very worthwhile to think through and agree the objectives and scope of the project with some of the stakeholders. It is also very helpful to invite your project team at this early stage to understand the boundaries of the project, so everyone knows what needs to be completed in order for the project to be considered a success.

What's next?

- [Plan a Project](#)
-

Plan a Project

Tip Planning a project well will help you steer the ship for the full duration of the project. Although it might be tempting due to expediency for a project manager to think through the steps needed to achieve the project's goal on their own, planning is definitely a team sport, and gaining input and understanding from the larger project team will be helpful. The project roadmap will be paved with high level summary tasks that can be broken down a bit into smaller child chunks of work with start and finish dates, which can optionally be grouped together into sections. And you can attach related files to help further flesh out the project.

What's next?

- [\(Exercise\) Plan a Project](#)
-

(Exercise) Plan a Project

1. Create a new project in your Project Central account.
2. Complete any of the options from these two sections, [Initiate a Project](#) - and - [Plan a Project](#), that you think would be helpful for you and your team to plan the upcoming project. Feel free to select as many or as few as you deem helpful. Ideally complete this exercise collaboratively with some or all of your project team members.
3. Schedule time with your entire project team (and perhaps your project sponsor) and together review your project setup (and in particular the team members invited, the task list and schedule, and the key connected files / deliverables).

What's next?

- [Manage a Project](#)
 - [Collaborate as a Project Team](#)
-

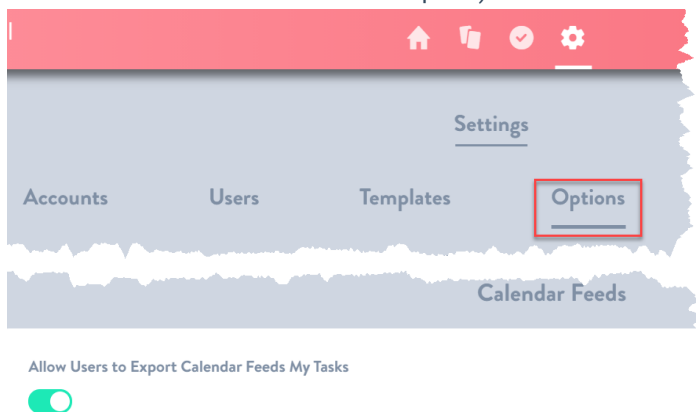
Collaborate as a Project Team

Tip After going through the important process of planning out all the tasks and related scheduling for your initiative, it's time to help your colleagues have an easy time keeping track of all the comings and goings of the project. You can send automated gentle reminders to task assignees, and they can in turn make updates to their tasks to show all the progress they're making. And remember to check reports and dashboards to see everyone's activity in one convenient place.

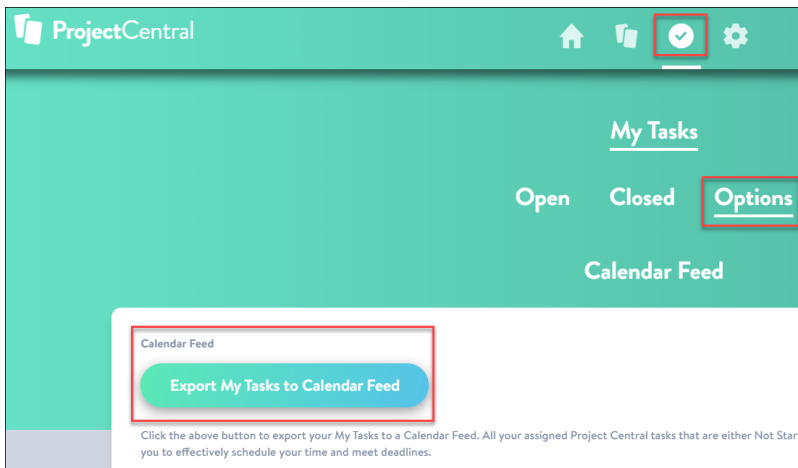
View Tasks on an External Calendar

Users can one-way sync their **My Tasks** list of tasks (only those with Due Dates) to an external calendar of their choice with iCal export. Each task will appear as an all-day event on the Due Date of the task. The calendar event includes a URL to open the task in Project Central's Task Side Panel. Note that this calendar connection will be ongoing and will reflect any new task information added to Project Central.

1. Confirm that the account administrator has enabled the option **Allow Users to Export Calendar Feeds My Tasks** in the **Calendar Feeds** section of **Account Settings | Options** (a project manager who is not also an account admin will not be able to enable this option):

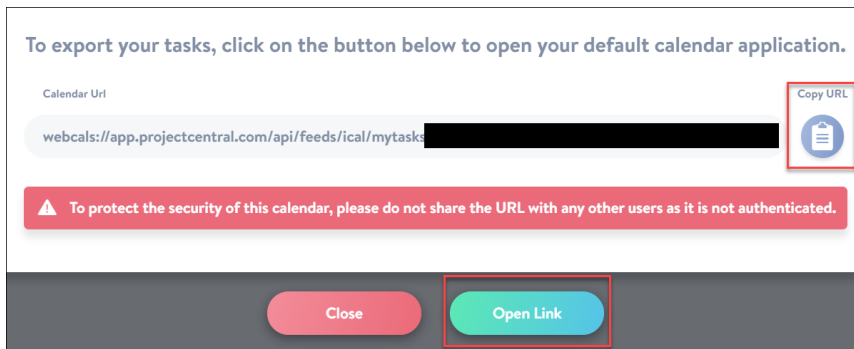


2. Once enabled, team members can then visit the **My Tasks | Options | Calendar Feed** section of the account and choose **Export My Tasks to Calendar Feed**.

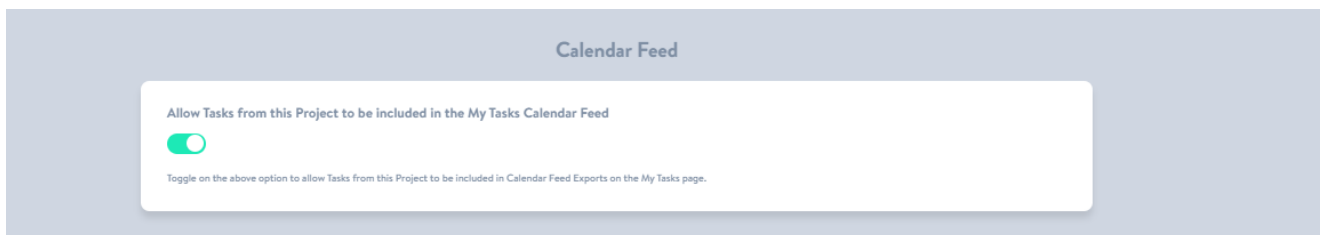


3. Users will then be presented with two options for exporting to an external calendar:

- Click **Copy URL** which allows users to manually paste the link into the relevant section of their choice of calendar.
- Click **Open Link** which will automatically add the tasks to the default calendar set in their operating system.



Once enabled on an account level, **Calendar Feed** can be enabled or disabled on a project level by the project manager in the project's **Options** screen.



What's next?

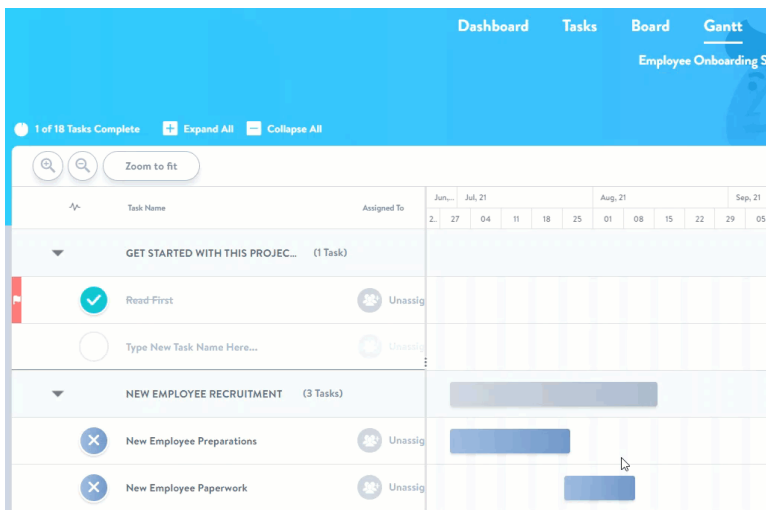
- [Track and Adjust a Project](#)

Track and Adjust a Project

Tip A project is not a project without surprises along the way - that's what makes projects interesting! Tasks that need some extra attention can be flagged to make it easy to find and act on them through filtered reports. Filtered reports also make it easy to narrow down views based on various characteristics. And Dashboards provide an easy way to report on a project's overall status and health, attributes your stakeholders are likely very interested in seeing.

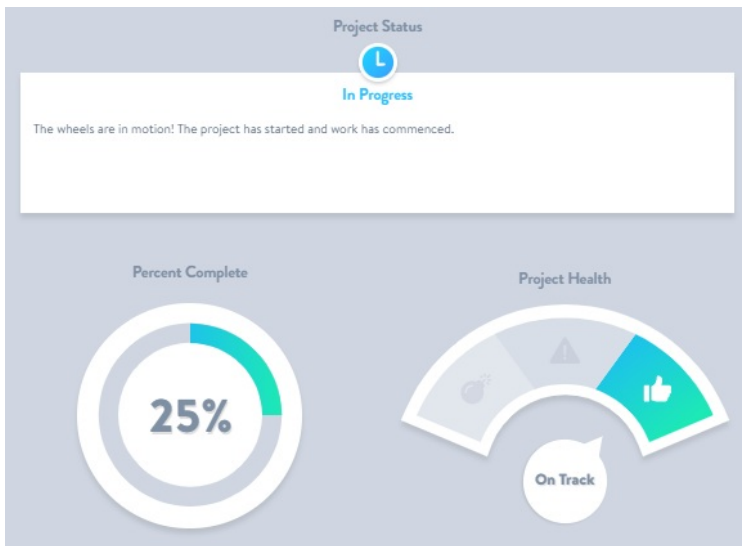
Adjust the Schedule on a Gantt Chart

We can check the Gantt Chart to see how we are doing time-wise and make any needed adjustments, now that the project is moving along:



Update Project Dashboard

Tracking and adjusting the project would not be complete without making updates to the project dashboard. The project dashboard has many important higher level sections including Project Status, Percent Complete, and Project Health:



What's next?

- [Close a Project](#)

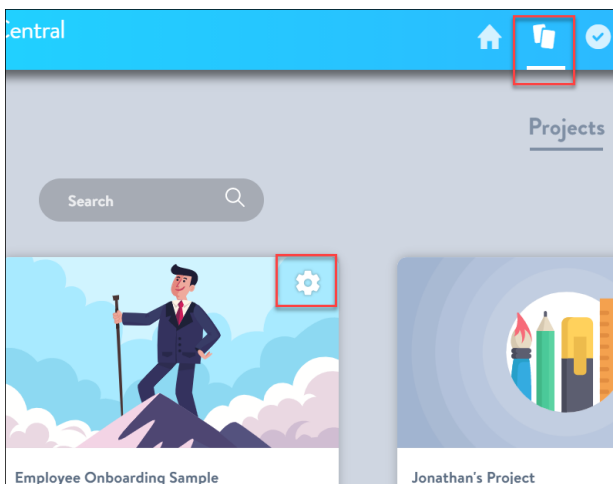
Close a Project

Tip As you get ready to close a project, be sure to make any final adjustments to it including project status and other elements that can be found on the dashboard screen. Project Templates save you from having to reinvent the wheel each time you're ready to kickoff a new project by allowing you to choose a previously saved template that was based on a prior similar project.

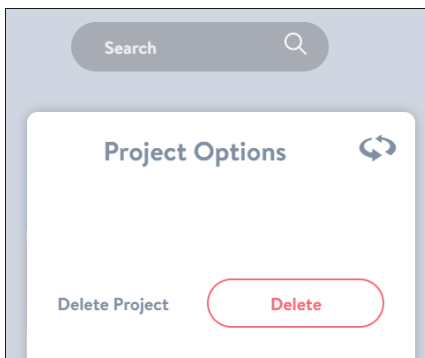
Delete a Project

Need to delete a project? It only takes a couple of clicks.

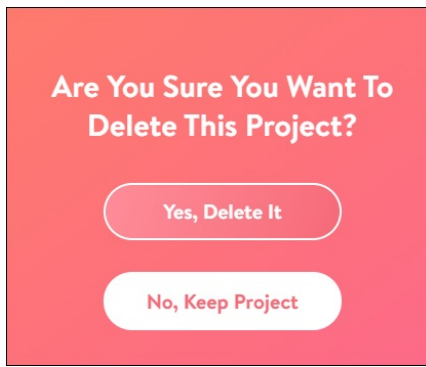
1. Click into the **Projects Dashboard** page, and click the relevant project card's **Options** gear icon.



2. Click Delete.



3. Confirm.



What's next?

- [\(Exercise\) Manage a Project](#)

(Exercise) Manage a Project

1. Review the options from these two sections, [Collaborate as a Project Team](#) - and - [Track and Adjust a Project](#), to identify practices that you think would be helpful for you and your team to collaborate, track and manage the upcoming project. Feel free to select as many or as few as you deem helpful. Ideally complete this review exercise collaboratively with your some or all of your project team members.
2. Schedule time with your project team and together review and commit to the 'Manage a Project' practices selected.
3. After a few weeks, gather the team and review the effectiveness of the 'Manage a Project' practices selected, and adjust as necessary.

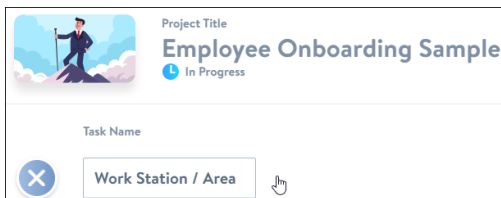
What's next?

- [Manage Across Projects](#)
 - [Manage Across Tasks](#)
-

Manage Across Tasks

Edit Tasks Inline

You can easily make inline changes to a task's Title, Progress, and Dates.



What's next?

- [Manage Across Projects](#)
-

Manage Across Projects

Tip Cross-project reporting provides an easy way to view high level status information on one screen from across all of your projects. And you have options including sorting and filtering that makes the job of reporting across all of your projects simple.

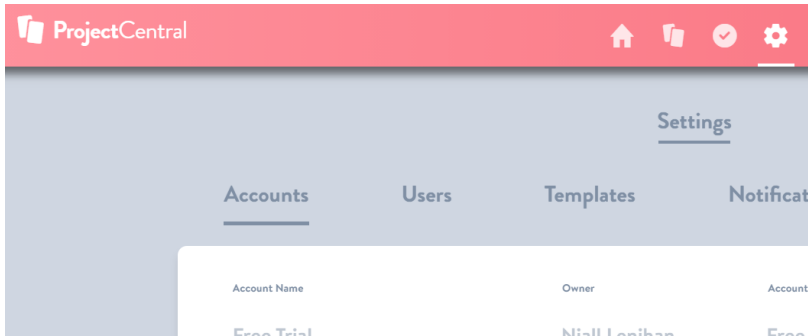
What's next?

- [Manage Across Accounts](#)
-

Manage Across Accounts

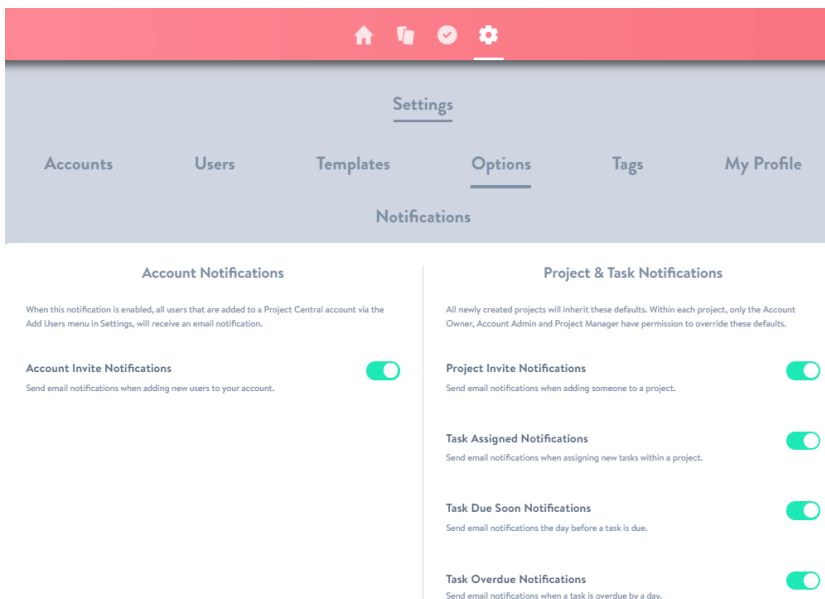
Manage Accounts

Project Central allows the setup of different Accounts, each of which could have many projects within them; this lets you keep sets of projects very separate. For example, Sales, Marketing, and HR can each have their own accounts with their own projects. Note that each account will require its own subscription.



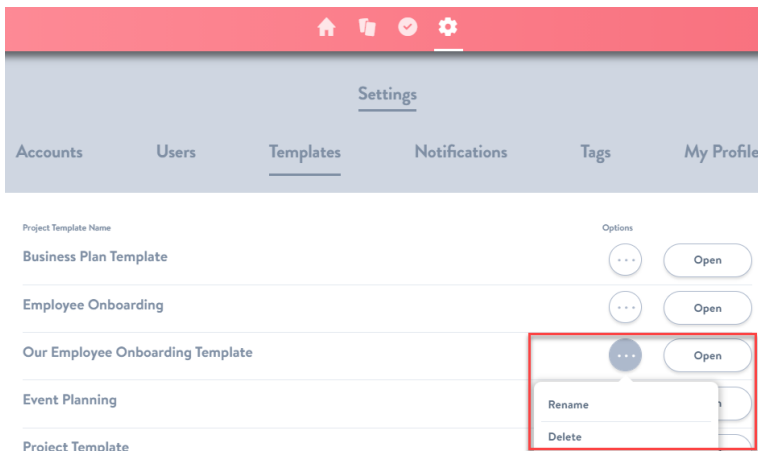
Manage Notifications

You can configure Project Central to automatically send notification emails about tasks (assigned, due soon, and overdue) from across all projects:



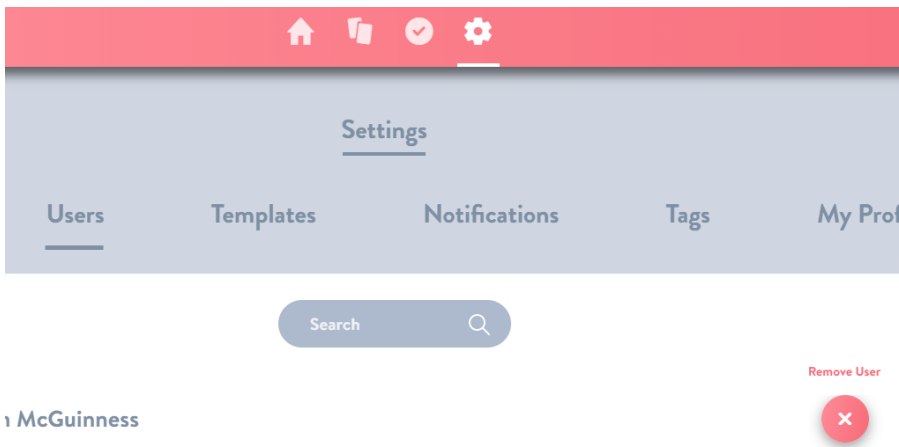
Manage Templates

To make changes to a previously saved project template click into the account settings screen, and then the Templates option:



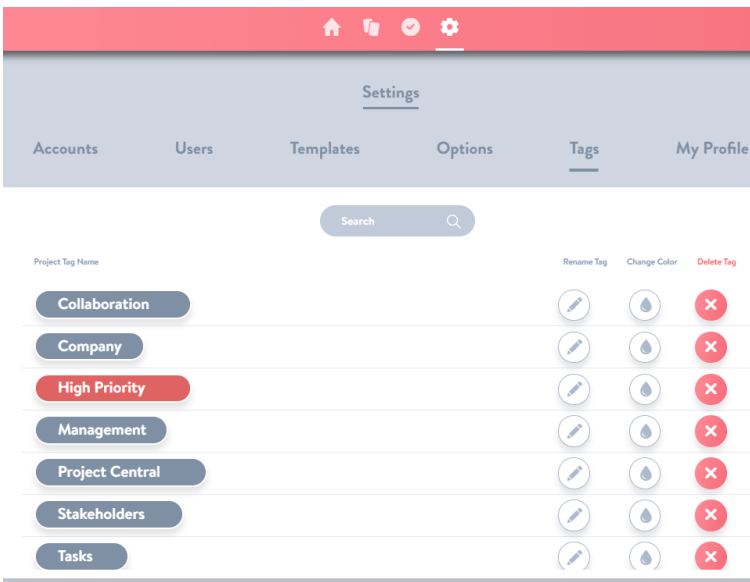
Manage Users

In the account settings screen, you have the ability to remove users from the entire account and associated projects (for example, if someone leaves your organization):



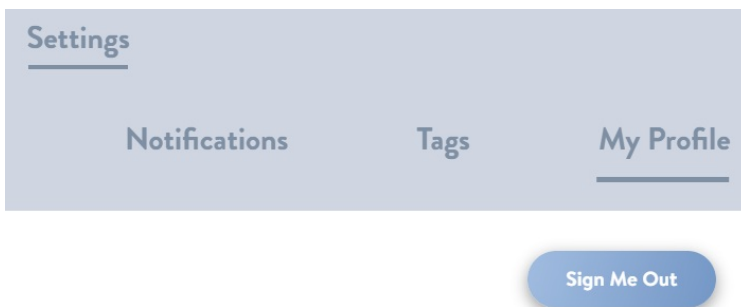
Manage Tags

You can rename, change color, or delete Tags for all projects with Settings > Tags:



Manage Your Profile

Need to sign out of Project Central? Click into My Profile and click Sign Me Out:



What's next?

- (Exercise) Manage Across Projects

(Exercise) Manage Across Projects

1. Review the options from these two sections, [Manage Across Tasks](#) - and - [Manage Across Projects](#), to identify practices that you think would be helpful for you and your team to manage across multiple projects. As before, feel free to select as many or as few as you deem helpful. Ideally complete this review exercise collaboratively with your some or all of your project team members.
 2. Schedule time with your project teams and together review and commit to the 'Manage Across Project' practices selected.
 3. After a few weeks, gather the team and review the effectiveness of the 'Manage Across Projects' practices selected, and adjust as necessary.
-

What is Project Central?

Project Central is a simplified project management solution built to help you collaborate easily and effectively with your team. By seamlessly integrating with your own Microsoft 365 environment, its clean, no-fuss interface makes project management a breeze, enhancing performance, reporting and results. Project Central is designed to lighten your manual workload and essentially make everyone on your team a project manager and team member.

Project Central in Under 2 Minutes:

What's next?

- For additional overview information including other resources and [pricing](#), see our [Project Central website](#).
 - Learn about [navigating Project Central](#).
-

Navigating Project Central

Top Navigation Bar

At the very top of the Project Central screen you'll find the Top Navigation Bar icons, not specific to any one project, but rather settings that relate to all projects in the account:



Home screen with Projects Overview



The cards icon will take you to the Projects screen where you can choose which project to dive into



My Tasks will show you all open tasks assigned to you across all projects



The settings gear will take you to account settings options for accounts, users, templates, notifications, tags, and your own personal profile

Project Navigation Bar

When you are within a specific project, you'll find a series of options towards the top of that project's screen:



Dashboard: Think of the Dashboard as command central for the project, where you will find start and end dates, project status information, project team members, and project tags.

Tasks: All the tasks that have been created for the project, optionally organized in sections.

Board: The Board page displays the project's tasks in a card view (instead of the traditional list view).

Gantt: If you'd like to see your tasks laid out in a calendar view, use the Gantt page.

Files: The files page is a one-stop location for links to project assets such as documents and images.

Activity: Activity will show you a running history of various project related items such as status comments, start/end date changes, and files.

Options: On the Options page you can change notification settings, save the current project as a reusable template, set the project to be private, and delete the project.

Note You can exit most dialogs by clicking away, using the Esc key, or the clicking the Close button.

What's next?

- [Get Started](#)
-

Getting Started Guide

We've prepared a video and article to help guide you through your initial usage of Project Central:

Plan a Project

Your project management journey with Project Central begins with three major activities: accessing Project Central, initiating a project, and then planning the tasks, steps, and resourcing for the project together with your team.

Access Project Central

Project Central can be accessed at <https://www.projectcentral.com/login/>, and when prompted, enter the same work email credentials that you use to access your organization's Microsoft 365 environment - no need to remember a separate username and password just to get your project day started. Since Project Central is a safe and secure environment that uses your existing Microsoft 365 tenant, the first time you access Project Central you'll be presented with a permission request. Depending on how your organization's infrastructure is setup, you may need the assistance of one of your IT colleagues with the first login. See [Access Project Central](#).

Initiate a Project

Once you've logged in successfully, you will have the option to create a brand new, clean project, or to create a project based on a template that's been conveniently supplied with the product. See [Initiate a Project](#).

Plan a Project

You're now at the final stage of planning out your project, prior to hitting the ground running. You and your team will appreciate the thoughtfulness that went into this project stage as it allows for true collaboration among team members, and leads to a realistic path towards project completion success. See [Plan a Project](#).

Manage a Project

Ready to see the fruits of all your planning labor? Let's move on to managing a project where you'll work on the execution stage of the project with your team, track and make some adjustments to the project plan, and finally close out the project.

Collaborate as a Project Team

Collaboration is the name of the game when it comes to a successful (and enjoyable) project experience. With the collaboration elements built right into Project Central, you can share files, comments, status updates, and a whole lot more with your colleagues. See [Collaborate as a Project Team](#).

Track and Adjust a Project

Now it's time to track progress of all the tasks going on throughout your project, with attributes such as task overall status, percent complete, and task comments. As you're tracking all this info, you may very well determine that adjustments need to be made; even the best thought out plan needs tweaking along the way. Project Central makes it easy to do just that, as well as viewing all the wonderful progress through our dashboards and reports. See [Track and Adjust a Project](#).

Close Project

On to closing the project, when you show the world what true project management heroes you and your team are. Just a few more steps to take before wrapping things up completely. See [Close Project](#).

Manage Across Projects

Manage Across Tasks

Wouldn't it be great if you had a one-stop place to go to view all of the tasks assigned to you, across all the projects you're contributing to? Project Central has you covered with our account My Tasks report where you can easily view all of your open and closed tasks. See [Manage Across Tasks](#).

Manage Across Projects

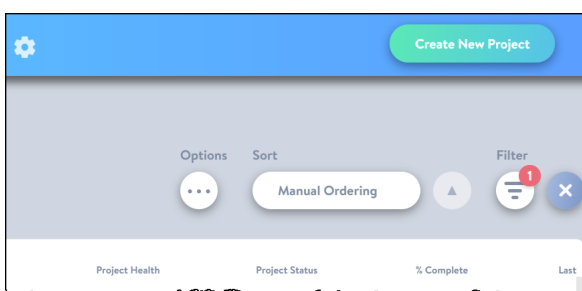
You'd probably also appreciate one place to go to see all the high-level info about the projects themselves - no problem. With our account project dashboard pages you can conveniently see an overview of the health of your projects, which deadlines are approaching, recent updates, and important metric data about each project. See [Manage Across Projects](#).

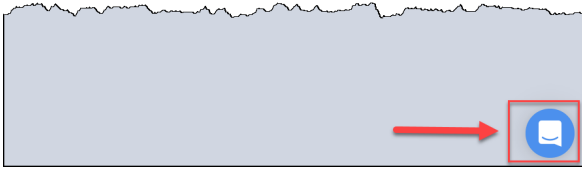
Manage Across Accounts

Project Central allows you to establish more than one Account, and within each you have the flexibility to configure the all important areas of notifications, templates, users, your profile, and more. See [Manage Across Accounts](#).


We're Here to Support You!

Choose a time that works best for you and [arrange a call](#) with our Customer Success Team, send an email to support@projectcentral.com, or use our in-app chat in the corner of the app screen.






Start a conversation

 Our usual reply time
🕒 **A few minutes**

[➤ Send us a message](#)

[See all your conversations](#)

Project Central Help



[How can we help you today?](#)
Click here to open the Help where you can get answers to common queries about the app, plus a range of step-by-step instructions on how to get the most value out of its

What's next?

- [More Getting Started Tips](#)
- [Plan a Project](#)
- [Access Project Central](#)

Training



Niall Lenihan

Project Central Training

Duration: 1 hour

Web Conference Details: Provided after you [book your meeting](#).

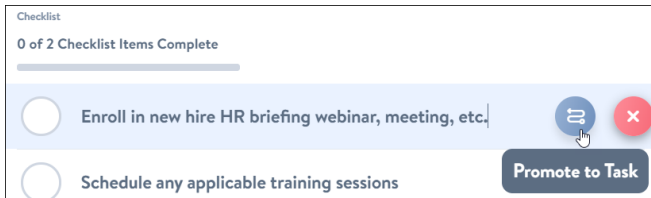
Project Central's onboarding services are here to support you and your team, every step of the way.

Release Notes

Release 20

Task Side Panel Checklist - Promote Checklist Items to Tasks

- [Checklist promotion](#) provides the ability to easily change a checklist item into a project task along with its current status.



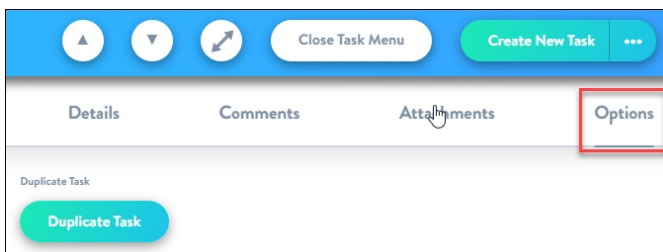
Performance Improvements

- This release includes behind the scenes improvements to increase performance.
-

Release 19

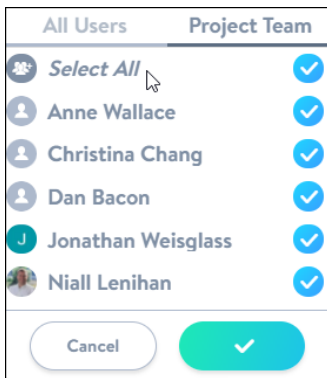
Task Duplication

- Project Managers now have the ability to [duplicate a task](#) with a choice of task details from the Options tab in the Task Side Panel in the Task List and My Tasks screen. This is a convenient way of creating a duplicate of any one task, so you can save time creating tasks with no need to input the same details entered previously.



Updated Task Assignee Picker

- When assigning resources to tasks you can now choose to [select all team members](#) simultaneously in the Task Side Panel of the Task List, Board and Gantt. This updated assignee picker provides a convenient way to assign tasks to your team and add new users to the project so you can intuitively assign work to keep the project running effectively.



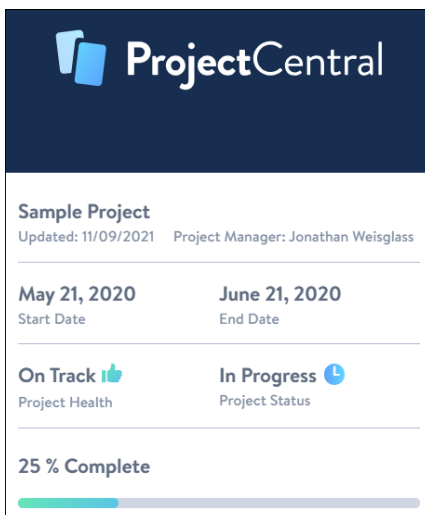
Release 18

Connect your Document Library to an Individual Folder

- For Project Files, users now have the ability to select a specific folder to connect to and not just the top level folder. This ensures that project managers have flexibility while still maintaining a single repository for project deliverables.
- For more information see [Connect a SharePoint Library](#).

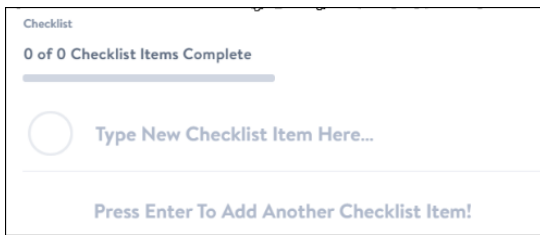
See Project Manager Listed On the Project Card

- The user that is currently assigned as the Project Manager on a project will appear on the Project Card on the Projects page. This helps senior executives see if anyone is over-burdened or who to go to for an update on any project at any time.



Add Multiple Items to a Task Checklist at Once

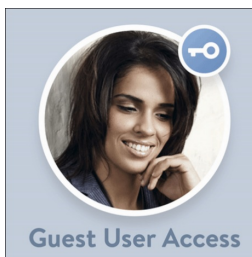
- The user now has the ability to paste a list of checklist items into a field, in a similar manner to how they can do so for the task list and task side panel. This will speed up project planning and ensure that tasks are filled out with all the details required to finish the work.
- For more information see [Add Checklists to Tasks](#).



Release 17

Guest Access – Working with External Contributors in Project Central

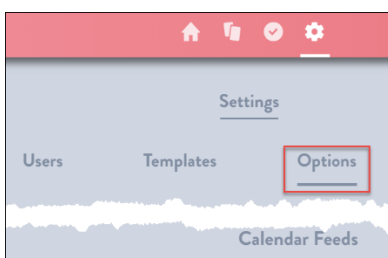
- Project success is dependent on many contributors, both internal and external to your organization. The latest release from Project Central allows users to invite any person from any Microsoft Azure Active Directory to collaborate in projects.
- With this latest update, external project team members, contractors, or stakeholders can be added to individual or multiple projects without creating unique logins. They can simply be invited to collaborate using their existing Microsoft work account.
- For more information see [Guest Access](#).



Release 16

Calendar Feed Export

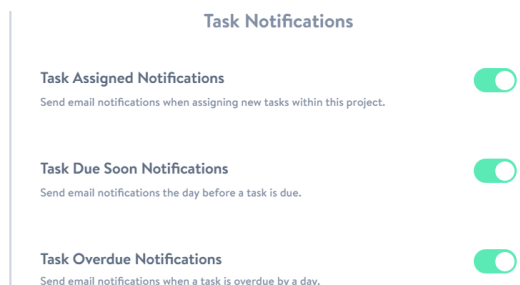
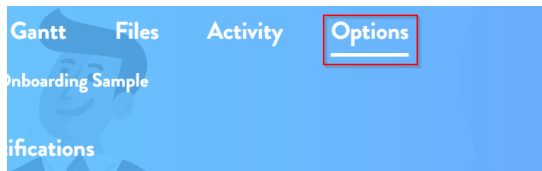
- You can export and sync your "My Tasks" list of tasks (only those with Due Dates) to an Internet calendar of your choice. Each task will appear as an all-day event on the Due Date of the task. The calendar event includes a URL to open the task in Project Central's Task Side Panel. Note that this calendar connection will be ongoing and will reflect any new task information added to Project Central.
- For more information see [Collaborate as a Project Team](#).



Release 15

Overdue Task Notifications

- When a task is now overdue by 24 hours , to prevent your team from falling behind the project timeline we will send a task overdue notification to get everyone back on track.
- This notification can be managed by the Project Manager directly in the project options.
- All newly created projects will inherit this default notification.
- Within each project, only the Account Admin and Project Manager have permission to override these options.
- For more information see [Collaborate as a Project Team](#).



Admin Permissions

- Project Mangers now have total control over each project including:
 - Project Manager Status
 - Project Invite Notifications
 - Task Assigned Notifications
 - Due Soon Notifications
 - Task Overdue Notifications
 - Privatizing a Project
 - Who can delete a project

App Performance Upgrade

- Project Central has been upgraded to improve speed and user experience.

Release 14

Project Central for Microsoft Teams

- The Project Central app is now available in the Microsoft Teams app store.
- Project Central for Microsoft Teams is built to enable you to transform conversations into structured work and

collaborate on Project Central Projects and Tasks right in Microsoft Teams, ensuring that your team can perform their best and accomplish more. See [Access Project Central](#).

