## Collaborate as a Project Team

Project Central Options to Help You Collaborate as a Project Team:

- Manage Task Notifications
- Update Tasks
- Flag Tasks for Attention
- Add Checklists to Tasks
- Add Comments to Tasks
- Add Files to Tasks
- Monitor Project Activity
- View Tasks on an External Calendar

**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.

## Manage Task Notifications

There are optional project notifications we can use for task assignments, tasks due soon, and tasks overdue:

Gantt Files Inboarding Sample	Activity	Options	
	Task Not	ifications	
Task Assigned No Send email notification	otifications as when assigning new tag	sks within this project.	
Task Due Soon N Send email notification	otifications as the day before a task is	due.	
Task Overdue No Send email notification	tifications as when a task is overdue	by a day.	

# Update Tasks

Members of the project team who have tasks assigned to them can make updates to task progress as progress occurs. By clicking on empty space to the right of a task name in the task list, they can update the task status, add additional task description details, a checklist to break the task down into smaller parts, flag tasks that are of particular importance (or are in trouble), add comments with @mentions to push emails to team members with updates or questions, and attach files to the task and project library.

Details	Comments	Attachments	Options
Task Progress	Flagged		
Not Started		Not Flagged	
Task Name			
New Employee Pape	rwork		
Start Date	Due Date		
No Start Date —	-> 🞽 07/17/2	2021	
Assigned To			
Unassigned Ta	sk		
Description			
B I U ∓ ?? 8≣ ½			
	,	need new employees to	complete and
help them get it dor	e when they join.		
Checklist			
0 of 4 Checklist Items Com	blete		
Identify HR po	oint of contact for	new hire	
Provide Contr	act of Employmen	t and role offer	

### **Change Task Progress**



# Flag Tasks for Attention

You can flag a task for attention by clicking into the task and setting the Flagged option in the task pane. This will set an indicator icon (flag) next to the task.



## Add Checklists to Tasks

There may be times when you would like to break a task down into a series of smaller steps - Project Central allows you to do just that with the Checklist feature. Bring up the Task Side Panel, click into the Details tab, scroll down to the Checklist section and enter a new Checklist item:





You also have the option to copy multiple items from a spreadsheet column and paste them all into a Checklist simultaneously. After initiating the paste into a single cell in the Checklist you'll be presented with an option to create separate items.

#### Promote a Checklist Item to a Task

You can decide at any time to convert a checklist item to a task. The converted task will be placed under the task the checklist item was originally part of (except in the Board view) and will maintain its original status. To promote a checklist item to a task:

- 1. Open the Task Side Panel of a task and click to the side of a checklist item.
- 2. Click the Promote to Task button.



# Add Comments to Tasks

Comments can be added from within the Task Side Panel. Comments help keep team members fully informed on how important aspects of a project are proceeding. If you would like to direct a comment to a specific Project Central user, use @ to mention them, and they will then be notified of the comment by email.



# Add Files to Tasks

The team can also attach files (already in the Project Library) or upload new files (to the Task and by extension to the Project library), from within the Task Side Panel:

	Close Tasl	k Menu Creat
Details	Comments	Attachments
Attachments		
Attach Project Files	Upload & Add Fil	les

# **Monitor Project Activity**

The Activity Feed provides transparency for changes made within the project over time, and displays who made the changes. This type of ongoing data flow takes the guess work out of knowing what is going on within the project, and allows the team to have very open, honest, and productive team meetings.

Dashboard	Tasks Board	Gantt Files	Activity	Options
	Emplo	yee Onboarding Sample		
All Activity Team Activity	Status Comments	Project Status	Start/End Dates	Project Tags Files
Jonathan Weisglass Changed the Project Image		•		Jul 9, 2021 4:12 PM
Jonathan Weisglass Added 2 Project Tags		0		Jul 9, 2021 4:12 PM
Company Collab	poration			
		0		
Jonathan Weisglass Updated the Health		0		Jul 9, 2021 4:12 PM
On Track				

### 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.

 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):

1		A 1	•	
		Se	ttings	
Accounts	Users	Templates	Options	
			Calendar Feeds	
Allow Users to Exp	ort Calendar Feeds My	7 Tasks		

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.

ProjectCentral	A	🗤 🕑 🌣
	Open	<u>My Tasks</u> Closed <u>Options</u> Calendar Feed
Calendar Feed Export My Tasks to Calendar Feed Click the above button to export your My Tasks to a Calendar Fe you to effectively schedule your time and meet deadlines.	ed. All your assigned Pro	ject Central tasks that are either Not Starte

- 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.

To export your tas	ks, click on the but	ton below to	open your	default cale	ndar application.
Calendar Url					Copy URL
webcals://app.project	central.com/api/feeds/ical.	/mytasks			
▲ To protect the sec	urity of this calendar, pleas	se do not share th	he URL with any	other users as it	is not authenticated.
	Close		Open Link		

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.

Calendar Feed
Allow Tasks from this Project to be included in the My Tasks Calendar Feed

#### What's next?

• Track and Adjust a Project