Collaborate on projects using Docs

Collaborate with team members, save notes, create project charters, and project briefs using Docs.

Before you begin

Role required: it_project_user

Procedure

1. Open a project in Project Workspace.
   For information, see Access the new Project Workspace.

2. Open the docs page of the project by selecting **Docs** from the list.

3. From the Pages section, select **Create page** and then select **Create Page from template** if you want to add a template for your document.
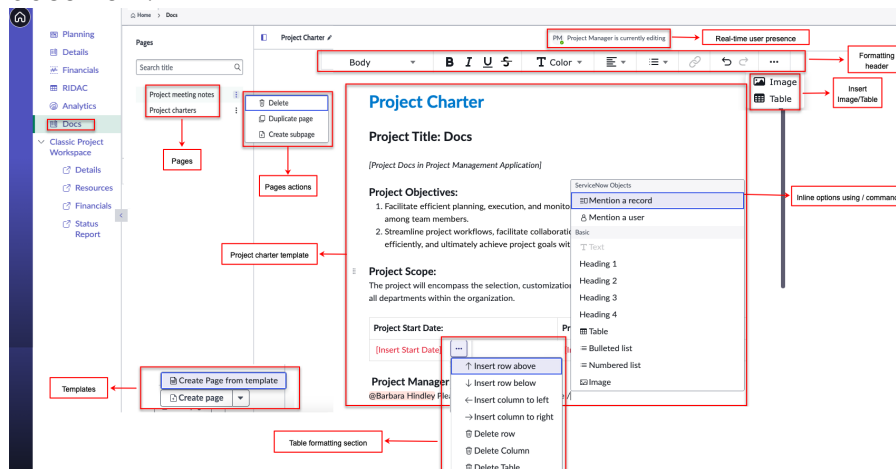
4. You can perform these tasks under the **Docs** page:

   • Use the forward slash on the keyboard to open a list of actions, including **Mention a user** or **Mention a record** as required.

   • Use the feature of live presence to see who is opening or working on a Doc.

Terms of Use Privacy Statement

- Create templates for documents such as project charters, project briefs, and meeting notes.

- Add meeting notes to record discussions, decisions, action items, and any relevant information discussed during meetings.

- Store information related to your tasks, add images or tables and collaborate in real-time using Docs.

- Select the more actions menu to delete, duplicate, or create child pages in the pages section.

- Apply rich text paragraph formatting, which includes headings, lists, alignment, and other styling options.