Working with projects and libraries

Note: In an integrated system, under **JOBS** page, click the **View Projects & Libraries** button to open the InSite Creative Workflow web interface for the customer. You may have to select a specific customer under the **JOBS** page in order to see the **View Projects & Libraries** button enabled. You have to have a project or library role assigned to you in order to see the **View Projects & Libraries** button enabled.

1. Perform the following actions:

To perform this action	Do this
Create projects	a. Select the customer, and select **Project** > **Create Project**.. b. In the **Project Name** box, type the project name. c. (Optional) In the **Description** box, type information about the project. d. In the **State** list, select the required project state. e. (Optional) In the **Project Number** box, type a project number. f. Click **Create**.
Manage project state	a. Select a project and then select **Project** > **Edit Project**. b. In the **State** list, select the required project state. **Note:** You can use the project state to filter the list of projects. c. Click **Update**.
Edit projects	a. Select a project and then select **Project** > **Edit Project**. b. In the **Project Name** box, edit the project name. c. (Optional) Edit the information about the project. d. In the **State** list, select the required project state. e. (Optional) In the **Project Number** box, type a project number. f. In the **Project End Date** box, select the end date for the project. g. Click **Update**.
Move projects	a. Select a project. b. From the **Project** menu, select **Move Project**. c. In the Move Project dialog box that appears, locate the customer, and click **Move**.
Delete projects	a. Select a project. b. From the **Project** menu, select **Delete Project**. c. In the Delete Project dialog box that appears, click **Delete**.
Create libraries	a. Select the customer, and select **Library** > **Create Library**.. b. In the **Library Name** box, type the library name. c. (Optional) In the **Description** box, type information about the library. d. Click **Create**.

Edit libraries	a. Select the library and then select **Library** > **Edit Library**.. b. In the **Library Name** box, edit the library name. c. (Optional) Edit the information about the project. d. Click **Update**.
Move libraries	a. Select a library. b. From the **Library** menu, select **Move Library**. c. In the Move Library dialog box that appears, locate the customer, and click **Move**.
Delete libraries	a. Select a library. b. From the **Library** menu, select **Delete Library**. c. In the Delete Library dialog box that appears, click **Delete**.