

# 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
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| Create projects        | <ol style="list-style-type: none"><li>a. Select the customer, and select <b>Project &gt; Create Project..</b></li><li>b. In the <b>Project Name</b> box, type the project name.</li><li>c. (Optional) In the <b>Description</b> box, type information about the project.</li><li>d. In the <b>State</b> list, select the required project state.</li><li>e. (Optional) In the <b>Project Number</b> box, type a project number.</li><li>f. Click <b>Create</b>.</li></ol>                                                        |
| Manage project state   | <ol style="list-style-type: none"><li>a. Select a project and then select <b>Project &gt; Edit Project</b>.</li><li>b. In the <b>State</b> list, select the required project state.<br/><b>Note:</b> You can use the project state to filter the list of projects.</li><li>c. Click <b>Update</b>.</li></ol>                                                                                                                                                                                                                     |
| Edit projects          | <ol style="list-style-type: none"><li>a. Select a project and then select <b>Project &gt; Edit Project</b>.</li><li>b. In the <b>Project Name</b> box, edit the project name.</li><li>c. (Optional) Edit the information about the project.</li><li>d. In the <b>State</b> list, select the required project state.</li><li>e. (Optional) In the <b>Project Number</b> box, type a project number.</li><li>f. In the <b>Project End Date</b> box, select the end date for the project.</li><li>g. Click <b>Update</b>.</li></ol> |
| Move projects          | <ol style="list-style-type: none"><li>a. Select a project.</li><li>b. From the <b>Project</b> menu, select <b>Move Project</b>.</li><li>c. In the Move Project dialog box that appears, locate the customer, and click <b>Move</b>.</li></ol>                                                                                                                                                                                                                                                                                    |
| Delete projects        | <ol style="list-style-type: none"><li>a. Select a project.</li><li>b. From the <b>Project</b> menu, select <b>Delete Project</b>.</li><li>c. In the Delete Project dialog box that appears, click <b>Delete</b>.</li></ol>                                                                                                                                                                                                                                                                                                       |
| Create libraries       | <ol style="list-style-type: none"><li>a. Select the customer, and select <b>Library &gt; Create Library..</b></li><li>b. In the <b>Library Name</b> box, type the library name.</li><li>c. (Optional) In the <b>Description</b> box, type information about the library.</li><li>d. Click <b>Create</b>.</li></ol>                                                                                                                                                                                                               |

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| Edit libraries   | <ul style="list-style-type: none"> <li>a. Select the library and then select <b>Library &gt; Edit Library..</b></li> <li>b. In the <b>Library Name</b> box, edit the library name.</li> <li>c. (Optional) Edit the information about the project.</li> <li>d. Click <b>Update</b>.</li> </ul> |
| Move libraries   | <ul style="list-style-type: none"> <li>a. Select a library.</li> <li>b. From the <b>Library</b> menu, select <b>Move Library</b>.</li> <li>c. In the Move Library dialog box that appears, locate the customer, and click <b>Move</b>.</li> </ul>                                             |
| Delete libraries | <ul style="list-style-type: none"> <li>a. Select a library.</li> <li>b. From the <b>Library</b> menu, select <b>Delete Library</b>.</li> <li>c. In the Delete Library dialog box that appears, click <b>Delete</b>.</li> </ul>                                                                |