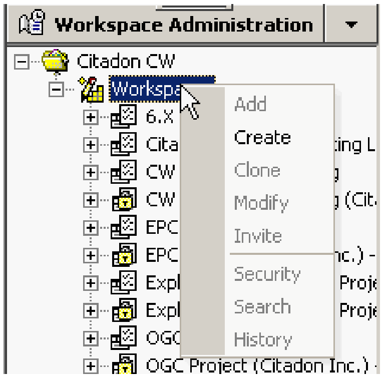
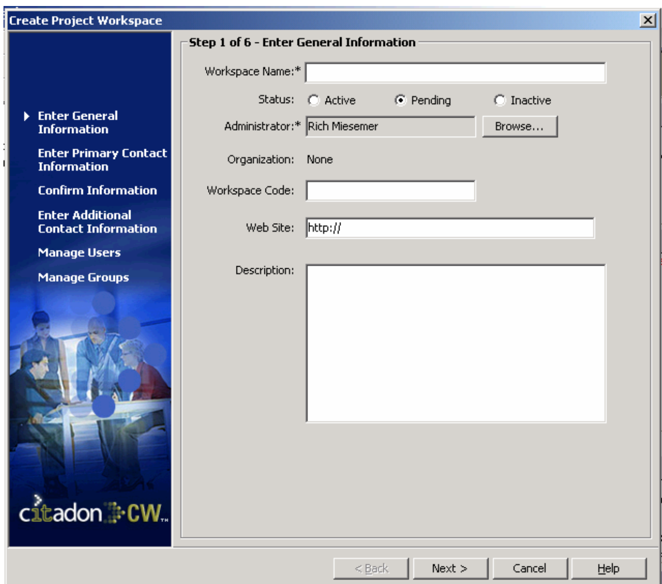
Create a new Project Workspace

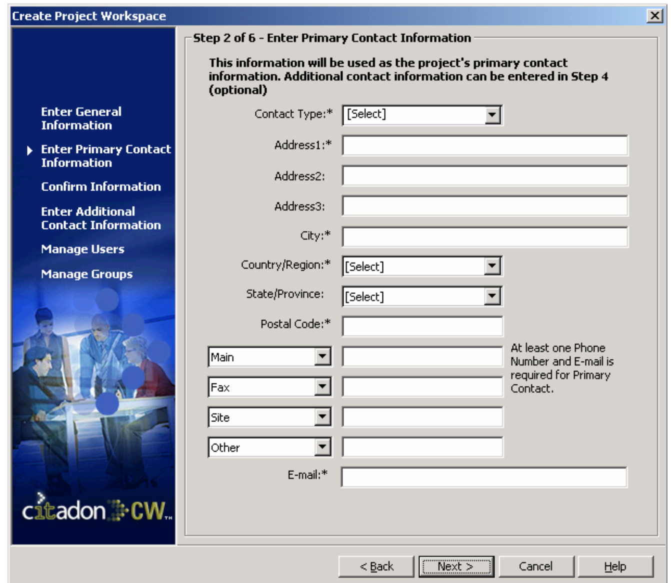
✍ Only users with Account Management administration privileges can create project workspaces.

1. From the left-hand navigation bar, select **Workspaces** in the **Workspace Administration** tab
2. Right-mouse click to **Create** a new project workspace.





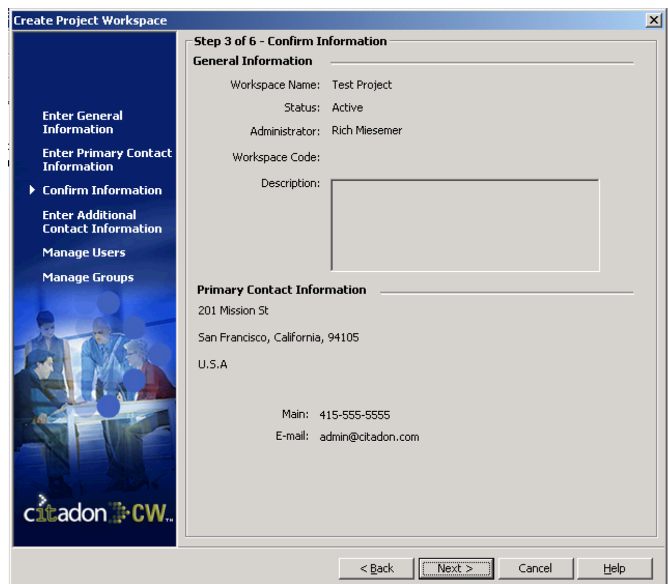
3. Enter the required General Project Information. Remember to:
   - Enter a **Workspace Name** (mandatory)
   - Change the status to **Active**
   - Select an **Administrator** for the workspace (mandatory)
   - Enter a **Workspace Code**
   - Enter **Description** for others to understand the purpose of the project.
   - Click on Next > to continue.



4. Select the **Contact Type** from the dropdown box.
5. Enter the **Project Address** information in all of the appropriate fields

✍ Citadon CW requires a **Primary Address** designation, so remember to check this box before you click on Next >.

6. Enter at least one Phone Number (mandatory)
7. Enter a valid email address for the primary contact (mandatory)

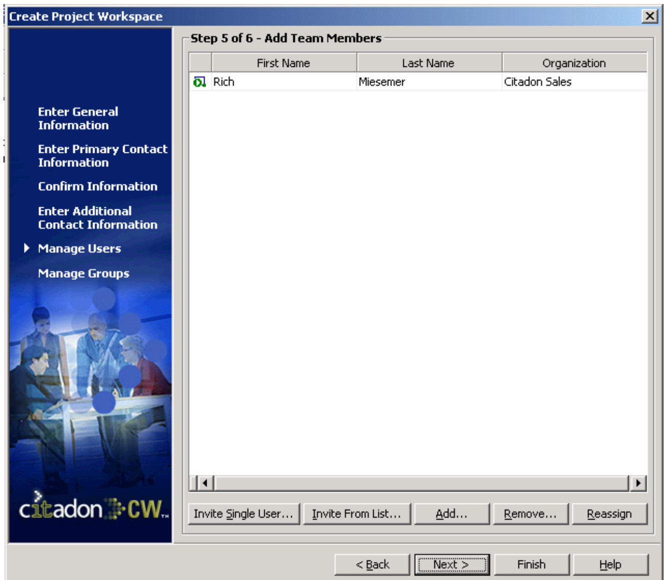


8. Review the contact information and then click on Next > to create the workspace.

✍ CW provides the opportunity to add additional contact information, or to exit the wizard.

Team

Once the project workspace is created, Citadon CW will provide you the opportunity to **Add** or **Invite** members to the Project.

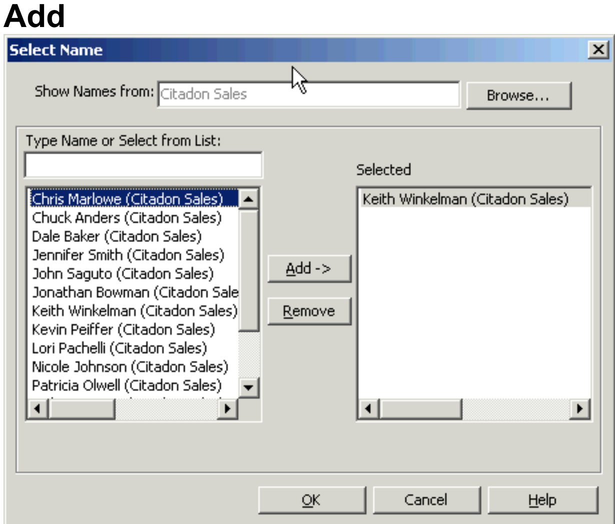


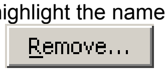
This option will allow you to add members from your Organization to the project.

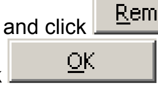
This option will allow you to invite new members to your project who are not part of your Organization

This option will allow you to invite a list of people to your project. You can either type the list by hand or import an Excel spreadsheet

Add

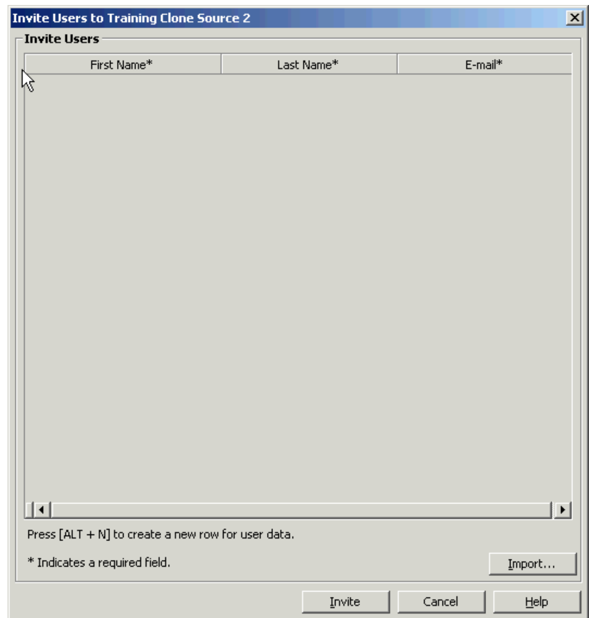


- When adding members from your organization, you may select members individually or in groups by using the **CTRL** or **SHIFT** keys. Once you have made your selections, click on the **>** icon to transfer the names to the window on the right.
- Use the **>>** icon to add all members.
- To unselect, highlight the name in the window on the right and click 

- Click 

to add the members to the Team

Invite



Citadon has provided an Excel template to be used when creating a list of users who should be invited to your project workspace. The template is located in the directory where you installed Citadon CW, e.g. C:\Program Files\Citadon\Citadon CW\Templates

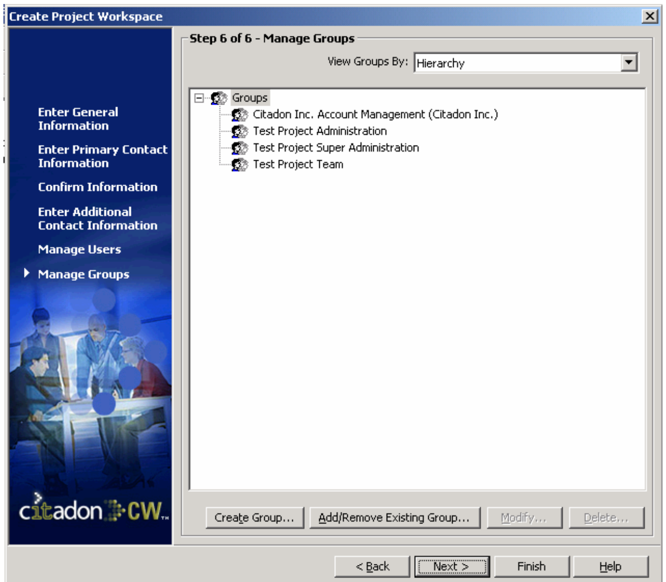
- **Invite Users Template**- This template is used to invite new members to a Project

After you have filled in the **Invite User Template** spreadsheet, remember to save the file to your local hard drive or local network drive.

1. While the **Invite User** dialog box is open, click on the **Import** icon
2. Locate the file from your local or network drive that has the import data and then click on **Open**.
3. Now click on **Invite** to close the dialog box.

All invited members will receive an email invitation with detailed instructions on how to accept and join the project workspace. Once the member has officially joined the project, the Workspace Administrator can handle additional access to folders and files.

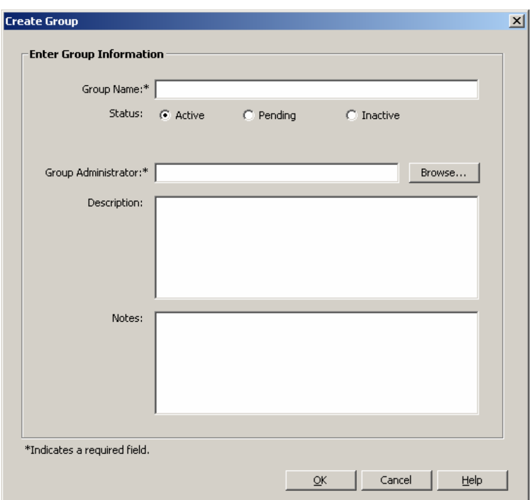
Groups



Create Group… This option will allow the Workspace Administrator to create new groups for a project workspace.

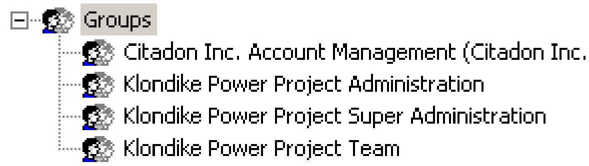
Add/Remove Existing Group… This option will allow the Workspace Administrator to add Organization groups to the project

Create Group

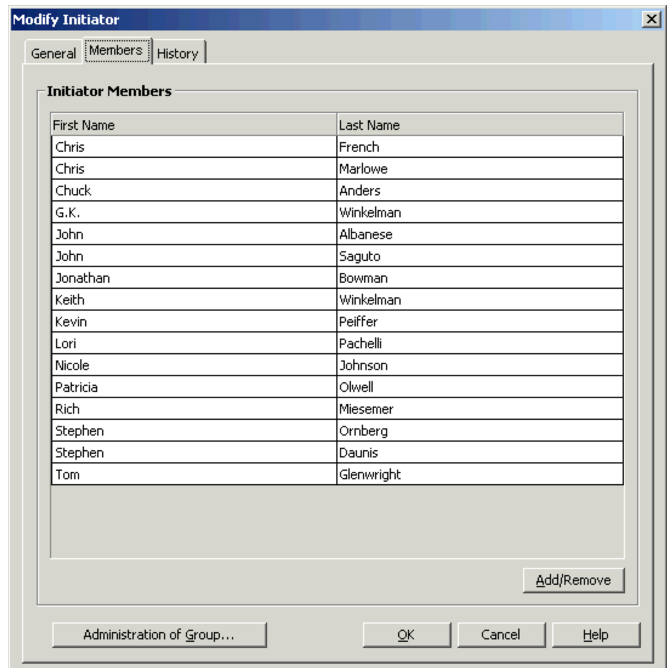


- Enter the Group Name.
- Select the **Status** of the group – **Active, Pending** or **Inactive**.
- **Group Administrator**- Select the name of the owner of this group. (Mandatory)
- Enter a description of the group in the **Description** field.
- Enter additional information in the **Note** field.
- Click OK

Add Members to the new Group



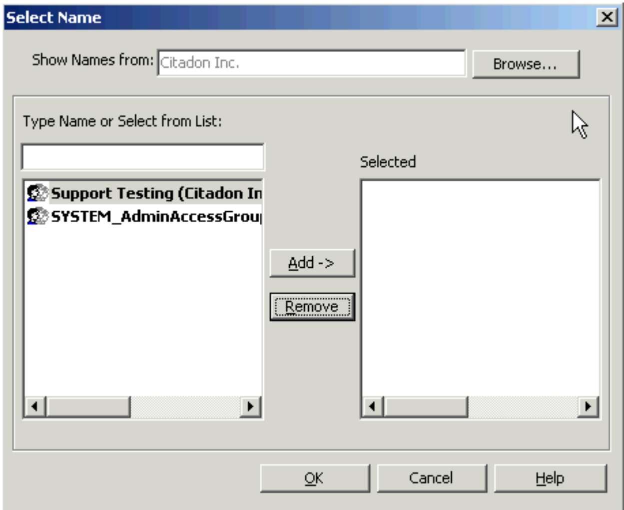
From the **Manage Groups** dialog box, double click on the name of the group you would like to add members or select the group and click on Modify…



- From the **Modify** dialog, select the **Members** tab and click on the Add/Remove button.
- Citadon CW will present a dialog box to select members.
- Use the Administration of Group… button to set **security** on the group.
- To complete the changes, click OK.

Add Organization Group to the Project Workspace

6. From the Modify Workspace Group dialog, click Add/Remove Existing Group… to add groups to this workspace.

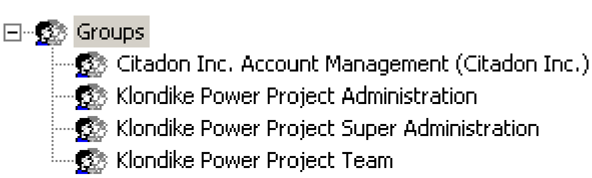


1. Use Browse... to find the Organization group that you wish to add to the project workspace.
2. Select the groups to be added and then click Add -> to add them to the workspace.
3. When finished, click OK to confirm the selection.

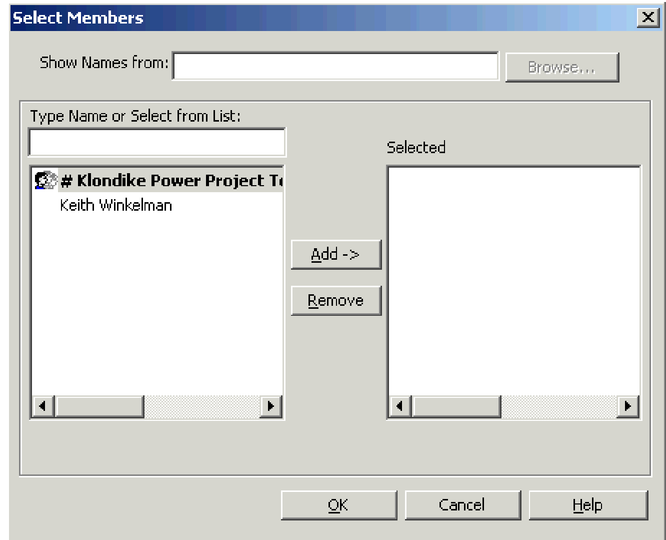
Setting Group Administration Rights

This section explains how to setup administration rights on the groups that were created for this project workspace, e.g. who can add members, remove members, etc. This section does not explain how to setup access control rights for the groups, e.g. what folders, documents, binders, business plans, etc. can the group access and what type of access control the group has on the object.

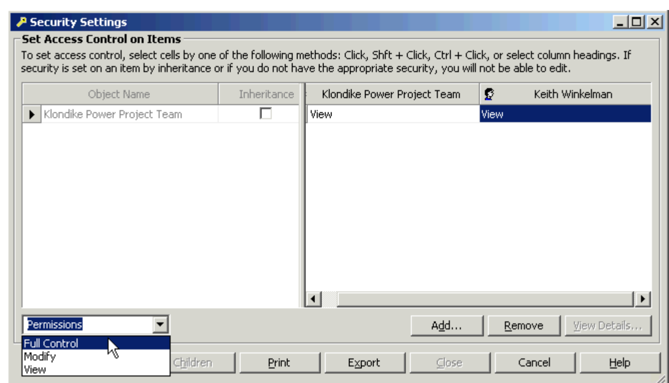
From the **Create Project** dialog box, double-click on the group and then click Administration of Group...



➢ In the Security Setting dialog box, click Add... to add groups or individual members.



➢ When selecting members or groups, you may select members/groups individually or in groups by using the **CTRL** or **SHIFT** keys. Once you have made your selections, click on the **>** icon to transfer the names to the window on the right.
➢ Use the **>>** icon to add all members.
➢ To unselect, highlight the name in the window on the right and click Remove...
➢ Click OK to complete your selection



➢ The security dialog box will now appear and allow you to modify the rights for each member or group by selecting the field under the name.
➢ After making the selection use the pull down dialog box in the left corner to set the associated security:
   - **Modify**- Ability to view, update and change
   - **View** – Ability to read
   - **Full Control**-Ability to view, update, delete and change.
➢ To complete the setting of Group Administration rights, click on Apply
➢ Repeat these steps for each member or group that you have added.