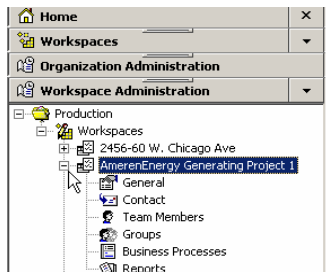


### Modifying an Existing Project Workspace

Only team members who are members of the Project Workspace Super Administration or the Administration group can perform the actions described in this guide.

After a project workspace has been created, administrators may need to

- Add, invite or remove team members,
- Create, modify groups to add or remove team members or groups, and
- Modify project workspace information.



From the left-hand navigation bar, select the Project Workspaces in the **Workspace Administration** tab

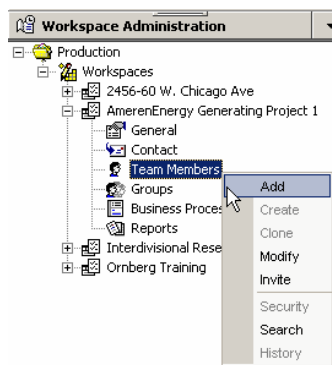
Click the + sign to **expand** a new project workspace.

### Add, Invite Or Remove Team Members

Before adding new team members it is recommended that these users already have Citadon CW accounts. New Citadon CW accounts are addressed in the **Quick Reference Guide – Organization Administration**. Refer to that guide for additional information.

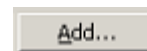
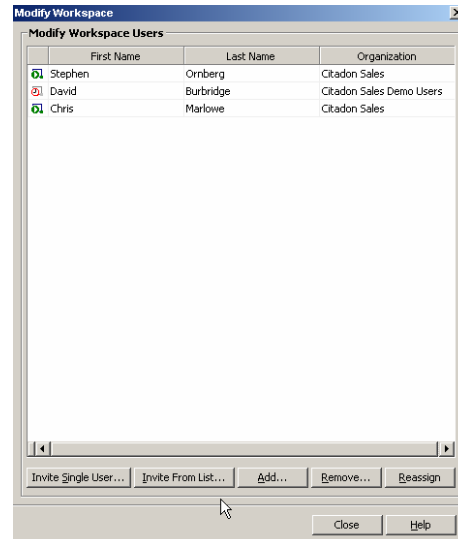
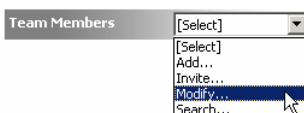
To add, invite, or remove team members, Select **Team members** and right click.

Selecting either **Add, Invite or Modify** opens the Modify dialog window.



Selecting **Search** opens up the Search window so you can search for specific users.

In addition to right clicking you can access the same dialog windows by selecting the drop down from the Summary page



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



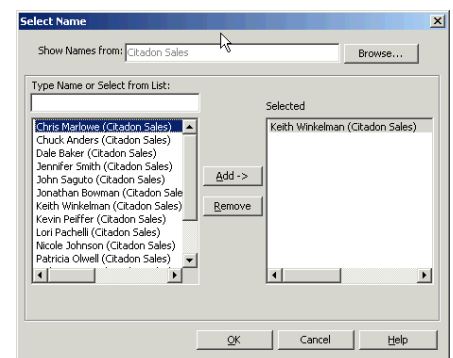
This option will allow you to invite new members to your project who are **not** part of your Organization



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

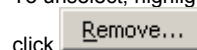
### Adding Additional Team Members from Your Organization


When adding additional members from **your** organization, you may click **Browse** to select the appropriate OU, and then 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  to add the members to the Team

### Inviting Users from Other Organizations

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 members from other

organizations to your project. The template provides fields for First name, Last name and Email Address.

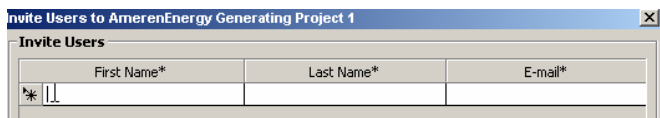
After you have filled in the **Invite User Template** spreadsheet, remember to save the file with an identifying name to your local hard drive or local network drive.

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**. The names will be imported into the above list
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.

### Invite Single User

Note: Pressing **ALT-N** on the above screen will allow you to enter member's names and email addresses a row at a time. This is the same as clicking on Invite Single User Button.

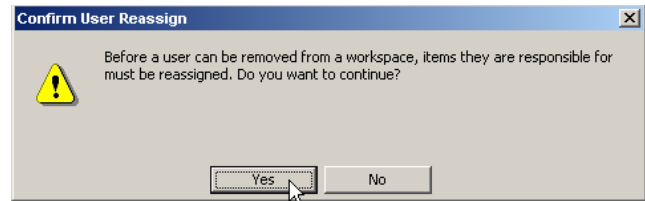


When finished, click on Invite to close the dialog box and send an email with instructions on joining the project workspace.

### Removing Team Members

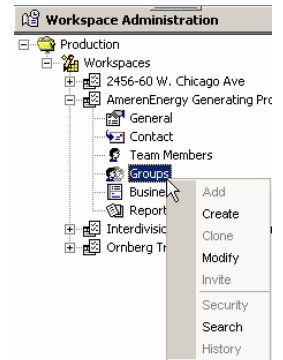
To remove a team member, select the team member in the team list and click **Remove...**

Next, a confirmation message will be displayed. Refer to the **Reassigning Users Quick Reference Guide** for details on how to reassign workspace items to a new user.



### Modifying Groups

To create or modify additional project workspace groups, right click on **Groups** and select **Modify** or **Create**. The Modify Workspace Group window will appear listing the current groups.



### Create a New Group

To create a new group from the Modify Workspace Groups window, click

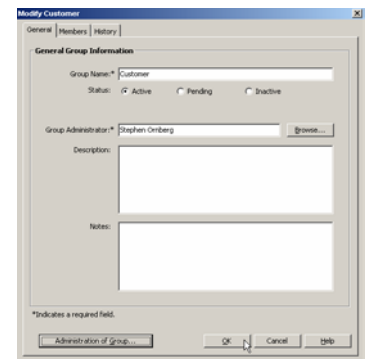


and follow the same process as when the groups were first created.

### Modify a Group

Select a group from the group listing and click the **Modify** button.

- Modify the Group name, if necessary.
- Set the Status of the group – Active, Pending or Inactive.
- Modify Group Administrator – By default the person who created the group is the administrator with full control permission for the group. To change the name of the owner of this group click on Administration of Group button. The Security Settings screen is displayed. Next Add, Remove or change the access rights for groups or individuals. Refer to Implementing Security Quick reference Guide for additional details on setting security.
- Modify a description of the group in the Description field.
- Add additional information in the Note field.
- Click **OK**

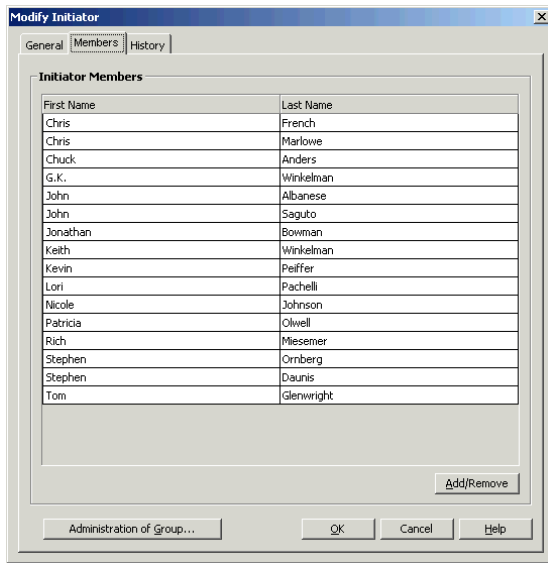


### Add/Remove Group Members

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

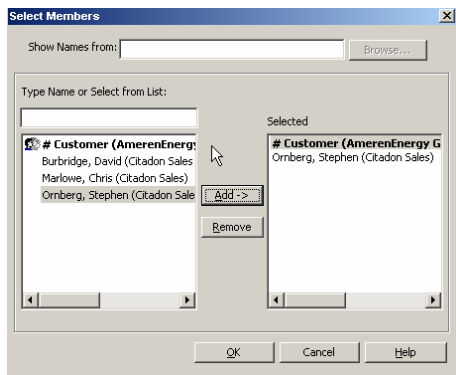


and click on



- From the **Modify** dialog, select the **Members** tab and click **Add/Remove**.

- Citadon CW will present a dialog box to select individuals or groups to Add or Remove.



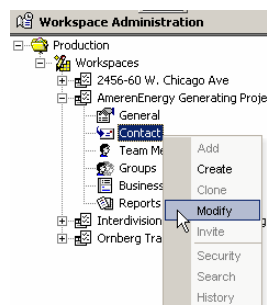
- To complete the changes, click **OK**.

## Add Organization Group to the Project Workspace

This option will allow the Workspace Administrator to add Organization groups to the project workspace. Refer to the *Quick Reference Guide for Addition of EP Groups to PWS*.

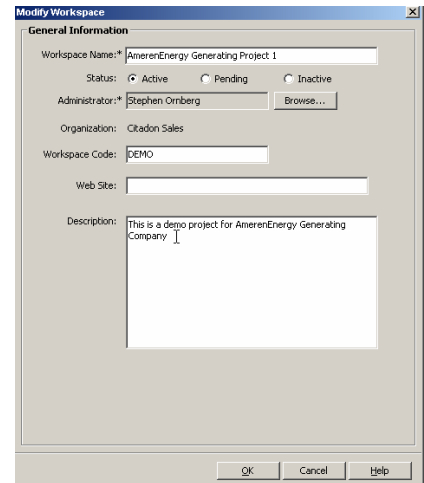
## Modify Project Workspace General Information

To modify the project general information right click on **General** and select **Modify**.



Modify the necessary General Project Information:

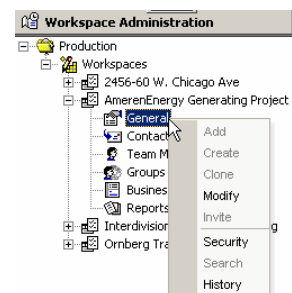
- **Workspace Name:** Changes to the workspace name will not be updated in the previously created Team, Super Admin or Admin groups. These will have to be manually changed. See section below on modifying Groups.
- **Status:** Change the status from Active to Pending or Inactive. **Note:** this is required prior to cloning.
- **Administrator:** A different Administrator can be assigned for the workspace. **Note:** Only members from your Organization or OUs can be selected. This person will automatically be added to the Super Administration group for the workspace.
- **Workspace Code:** This code can be a project identification number. This is an optional field.
- **Modify a Web Site:** This can be used to provide a link to an external web site, such as your company web site or web site of a web-based site camera.
- **Description:** You can provide a description for others to understand the purpose of the project when they see it in the Workspace Summary page.
- Click **OK** when finished with changes.



## Modify Project Workspace Contact Information

To modify the project contact information right click on **Contact** and select **Modify**

The Contact Information provides address, phone and email contact information for the primary



contact, typically the lead workspace administrator.

- Modify the Contact Type from the dropdown box.
- Modify 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 OK.

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



**Modify Workspace**

**Contact Information**

Contact Type: Office (Primary Address)  Primary Contact

Address1: 300 Sur Woods Dr

Address2:

Address3:

City: Effingham

Country/Region: U.S.A

State/Province: Illinois

Postal Code: 62401

Main: [Select] 630-369-5956

[Select]

[Select]

[Select]

E-mail: somberg@citadon.com

At least one Phone Number and E-mail is required for Primary Contact.

Clear

OK Cancel Help