Manage your Workspaces

Creating a Workspace

• Go to organization settings in the Workspaces tab.

2D	RAN	sit ≡							요 Select a workspace 👻 🙎
Home /	Organizatio	n Settings / Workspaces							
	Information	Workspaces	ழி Users	음 External Users	() Activities	Access Rules	음 Cust	tom Roles 🛛 🗖 Billing	
Wo	rkspaces								() Create
		2D Transit	\$	All Modules	\$	All Status	\$	Enter workspace name	Q
I	No workspa	ces							
2D Transi	it © 2021								

• Click the **Create** button.

2D RANSIT =	& Select a workspace ▼
Home / Organization Settings / Workspaces	
① Information (맘 Workspaces) & Users 合 External Users ⓒ Activities ⓒ Access Rules 合 Custom Roles 🚍 Billing	
Workspaces	← Create
2D Transit All Modules All Status Enter workspace name Enter workspace name 	Q
No workspaces	

• Fill-in the name and click the **Add** button to proceed.

2DTRANSIT =	& Select a workspace 👻 🙎
Home / Organization Settings / Create new workspace	
Add new Workspace © Back	
Name	

Updating Workspace Name & Color

We have two options in updating name and color for workspaces. See the options below.

- First Option
 - Go to organization settings in the **Workspaces** tab.

Information Worksp	aces 🔒 Users 🔒	External Users (S) Activities	🖲 Access Rules 🛛 🔂 Custom Roles	🚍 Billing
Workspaces				• Creat
2D Transit	♦ All Modu	All Status	Enter workspace name	Q
Name	Status	Created		Actions
Workspace 1	Enabled	13 minutes ago by Olive	Tree	🚳 Manage 👻

• Find the workspace that you want to update and click the **Manage** dropdown button then select the **Edit** menu.

() Information	aces 🔒 🚯 Users 🔒 E	xternal Users () Activities	⊗ Access Rules 🔒 Custom Roles	a 🚍 Billing
Norkspaces				() Creat
2D Transit	All Modul	es 🗢 All Status	♦ Enter workspace name	Q
Name	Status	Created		Actions
Workspace 1	Enabled	13 minutes ago by Olive	Tree	🕲 Manage 💌
				Hereit Modules

• Update the workspace name field or select color from the color picker.

Vorkspaces					•) Creat
2D Tran	sit	 All Modules 	All Status	\$	inter workspace name	
Name	Status	Created		Actions	Edit Workspace	
Workspace 1	Enabled	13 minutes ago by Olive Tree		🕲 Manage 👻	Name Workspace 1 Dashboard Button Color #1985ac	

• Once you're set, click the **Update** button to proceed.

- Second Option
 - Click the **Home** menu in the sidebar and you will see the list of workspaces. Find the workspace you want to update it and click the **cog** icon to redirect in the workspace settings.

	${\mathbb B}$ Select a workspace $$	Q	
Home			
Olive Company		@ Ma	nage
Workspace 1			

• In the **Information** tab, update the workspace name field or select color from the color picker.

	Ξ	요 Workspace: Workspace 1 ▼ 🗘	
Home / Workspace Settings			
(1) Information	এ Users 끎 Modules ⓒ Access Rules 合 Custom Roles		
Workspace Informatic	n		
Name Workspace 1			
Dashboard Button Colo #1985ac			
O Update	_		

• Once you're set, click the **Update** button to proceed.

Managing Workspace Users

- To Invite a User
 - In the workspace setting in the **Users** tab, click the **Invite** button.

				요 Workspace: Workspace 1 - 🧟
Home / Workspace Settings / Users				
① Information ③ Users 🗄 Modules	() Access Rules	습 Custom Roles		
Users				→ 🗐 Invite 🕑 Add
	All Roles	Search for name or email	Q	
Avatar First Name	Last Name	Email	Base Role	Status Actions
Olive	Tree	treeolive55@gmail.com (You)	Owner	Enabled Ø Manage 🔻

• Fill-in the needed information and click the **Invite** button once you're done.

/ Workspace Settings / Users / Inv	nte			
nvite Members				⊕ Bac
Email	First name	Last name	Role	
user1@email.com	User	Transit	Workspace Admin 🗢	() Remove
				⊕ Add more

• (Optional) If you want to add more users, just click the **Add more** button.

				요 Workspace: Workspace 1
e / Workspace Settings / Users / Inv	vite			
Invite Members				⊕ Back
Email	First name	Last name	Role	
user1@email.com	User	Transit	Workspace Admin	⊕ Remove
Email	First name	Last name	Please choose a role	
				Add more
✓ Invite				

 Please note that inviting any users will need confirmation on their end using their email. If the invited user was new, the user needed to set the password but if the user already existed, the user only needed to click the confirmation link.

• To Add a User

• In the workspace setting in the **Users** tab, click the **Add** button

				요 Wor	kspace: Workspace 1 -
Home / Workspace Settings / Users					
① Information ① Users 第 Modules	Access Rules	☆ Custom Roles			
Users					Invite ⊕ Add
	All Roles	Search for name or email	Q		
Avatar First Name	Last Name	Email	Base Role	Status	Actions
Olive	Tree	treeolive55@gmail.com (You)	Owner	Enabled	🗇 Manage 🔻

Fill-in the needed information and click the Add button once you're done. Please note that there
is already a password provided. Don't forget to save it as this will be used by the user that you
directly added.

2		=				& Workspace: Workspace 1			
Hom	e / Workspace Settings /	/ Users / Add							
	Add Members					🕒 Back			
	This will force adding new members with a password. But if that user already has an account in this system, their password won't be overridden.								
	Email	First name	Last name	Role	Password				
	user1@email.com	User	Transit	Workspace Admin	¢ q9KjMuLjm3	⊗ Remove			
						Add more			
	⊲ Add								

• (Optional) If you want to add more users, just click the **Add more** button.

					요 Workspace: Workspace 1
/ Workspace Settings / Users	/ Add				
Add Members					(···) Bac
his will force adding new memb	ers with a password. But if that user alree	ady has an account in this system, their pa	ssword won't be overridden.		
Email	First name	Last name	Role	Password	
user1@email.com	User	Transit	Workspace Admin	¢ q9KjMuLjm3	⊗ Remove
Email	First name	Last name	Please choose a role	♦ UXVD8Je1O6	⊗ Remove
					• Add more
⊲ Add					

- Update User Permission
 - In the workspace setting in the **Users** tab, find the user that you want to update the permission and click the **Manage** dropdown button then select **Permissions** menu.

	ыт ≡				& Workspace: Workspace 1▼ ↓
ome / Workspace Se	ettings / Users				
(i) Information	(Users B M	Iodules 🛞 Access Rules	습 Custom Roles		
Users					✓ Invite
		All Roles	Search for name or email	Q	
Avatar	First Name	Last Name	Email	Base Role	Status Actions
	Olive	Tree	treeolive55@gmail.com (You)	Owner	Enabled 🛞 Manage 👻
٢	User	Transit	user1@gmail.com	Admin	1 Ensitive
					Remove

 You can directly set a permission using a custom role if you created one in the Custom Role tab in your workspace settings. Just go to the Manage Custom Roles section and select the role you want.

Access Management of User1 T	ransit								⊕ Back
Manage Custom Roles					Previews				
The role at the bottom will have	e higher priority.	This is for preview only,	to modify please update cust	om roles or overric	le permissi	ons.			
Extended Role			Actions		2D Transit				\$
Select a role	×				Permission Group	Permission	Allow	Deny	Inherit
Override Permissions					2D BARCODE	Management	0		
			on't be im	pacted		View	0	\bigcirc	•
Please update to overwrite use	r specific permission. Once o	verwrite, it w							
Please update to overwrite use by any access rules anymore.	r specific permission. Once o	verwrite, it w			Efficient Report	Management	0		
	r specific permission. Once o Permission	Allow	Deny	Inherit	Efficient Report	Management Management	0 0		

 If you don't have a custom role, you can manually update the permission in the Override Permissions section. Just select any permission group then select if you want to allow, deny or inherit the permission to the user.

ccess Management of User1	Transit								⊕ Back
lanage Custom Roles					Previews				
The role at the bottom will ha	we higher priority.				This is for preview only.	, to modify please update custo	om roles or overrid	le permissi	ions.
Extended Role			Actions		2D Transit				\$
Select a role	~				Permission Group	Permission	Allow	Deny	Inherit
verride Permissions					2D BARCODE	Management	0		
		overwrite, it w	on't be im	pacted		View	0	0	0
		overwrite, it w	on't be im	pacted	Efficient Report	View Management	0 0	•	•
Please update to overwrite us by any access rules anymore. Permission Group		overwrite, it w Allow	on't be im Deny	pacted	Efficient Report FNSKU				
by any access rules anymore. Permission Group						Management	0	0	0

• Remove a User

• Go to the workspace settings then select the **Users** tab.

	п ≡				& Workspace: Workspace 1 - 🗘				
Home / Workspace Settings / Users									
(i) Information	(A Users) IB Module	s ③ Access Rules	🛆 Custom Roles						
Users					✓ Invite				
		All Roles	Search for name or email	Q					
Avatar	First Name	Last Name	Email	Base Role	Status Actions				
٢	Olive	Tree	treeolive55@gmail.com (You)	Owner	Enabled 🖗 Manage 🔹				
	User	Transit	user1@gmail.com	Admin	Enabled 🛞 Manage 👻				

• Find the user you want to remove and click the **Manage** dropdown button then select the **Remove** menu.

2		. =					ßw	orkspace: Workspace 1
Hor	me / Workspace Settin	gs / Users						
	① Information	(Users	 (e) Access Rules	₿	Custom Roles			
	Users							Invite ⊕ Add
			All Roles	÷	Search for name or email	Q		
	Avatar	First Name	Last Name		Email	Base Role	Status	Actions
		Olive	Tree		treeolive55@gmail.com (You)	Owner	Enabled	Ø Manage ▼
		User	Transit		user1@gmail.com	User		Manage
							2	Change base role Remove

• A confirmation message will appear, click the "**Yes, I understand & confirm**" button if you want to proceed in removing or click the "**No**" button if you want to cancel.

			Workspace: Workspace 1						
Home / Workspace Settings / Users									
① Information									
Users			Invite ⊕ Add						
	All Roles Search for name or email	Q							
Avatar First Name	Last Name Please confirm ×	Base Role	Status Actions						
Olive	Tree Are you sure you want to remove this account?	Owner	Enabled 🛞 Manage 👻						
User	Transit	User	Enabled 🛞 Manage 👻						

Removing a Workspace

• Go to the Home page and click the **Manage** button of the Organization.

	& Workspace: Workspace 1 🗸
Home	
Olive Company	→ ([®] Manage
Workspace 1 ©	

• Go to Workspaces tab

				& Workspace: Workspace 1▼ ♀					
Home / Organization Settings / Workspaces									
() Information	aces & Users A External Users	③ Activities ③ Access Rules	合 Custom Roles						
Workspaces				€ Create					
2D Transit	♦ All Modules	♦ All Status	Enter workspace name	Q					
Name	Status	Created		Actions					
Workspace 1	Enabled	5 days ago by Olive Tree		🖗 Manage 👻					

• Find the workspace that you want to remove and click the "**Manage**" dropdown button then select the "**Remove**" menu. *Please note that removing a workspace can no longer be retrieved into the system.*

				요 Workspace: Workspace 1 - 유
ome / Organization Settings / Workspaces				
① Information	身。Users 合 External Users	③ Activities ③ Access Rules	🔒 Custom Roles 🛛 🚍 Billing	
Workspaces				⊕ Create
2D Transit	♦ All Modules	♦ All Status	Enter workspace name	Q
Name	Status	Created		Actions
Workspace 1	Enabled	5 days ago by Olive Tree		1 Manage Modules Applications
				2 Edit © Remove

• A confirmation message will appear, click the "Yes, I understand & confirm" button if you want to proceed in removing or click the "No" button if you want to cancel.

2D	TRAN	ISIT =					& Workspace: Workspace 1▼ &		
Home / Organization Settings / Workspaces									
	Information rkspaces	n BB Workspaces) Custom Roles 🛛 🖶 Billin	(c) Greate		
		2D Transit	♦ All M	lodules 🗢	All Status 🗢	Enter workspace name	Q		
N	ame		Status	Please confirm		×	Actions		
w	/orkspace 1		Enabled	Are you sure you want to remove	ve this workspace?				
					⊘Yes, I understand & confirm!	⊗ No			