

How to Invite a User into a Workspace

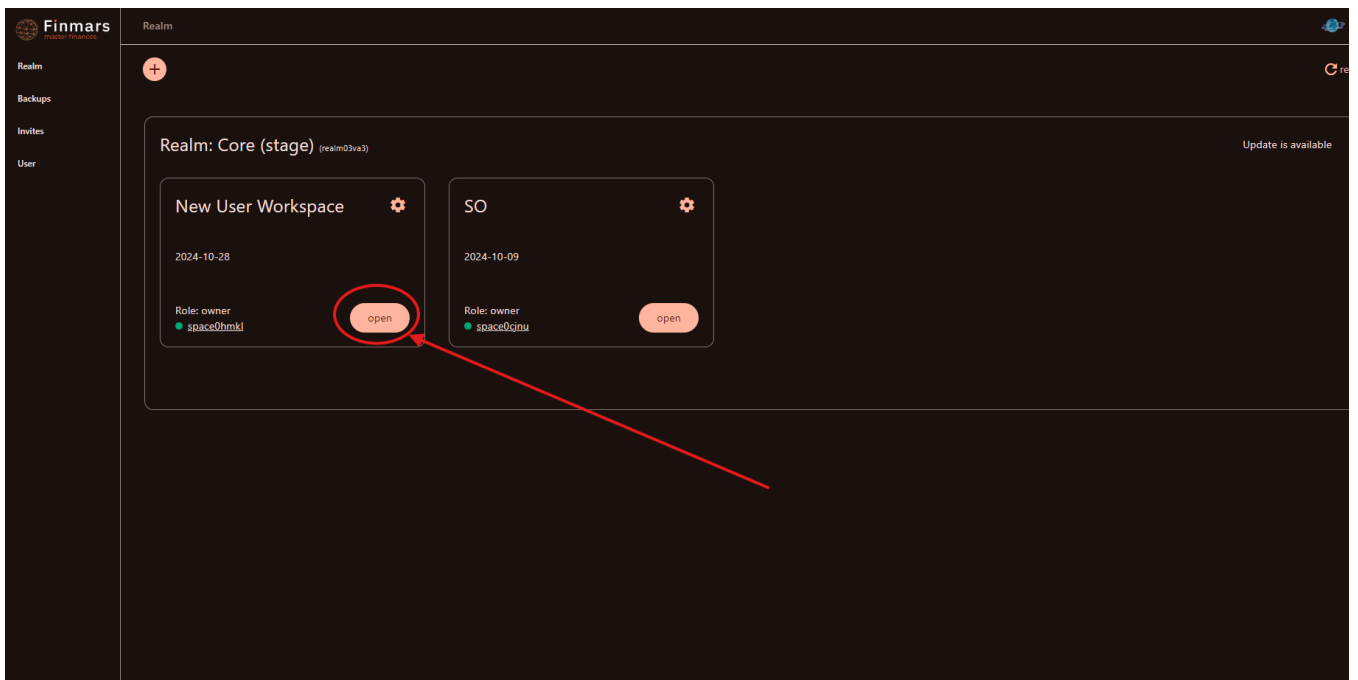
Prerequisites

We assume you have all prerequisites you may need, including:

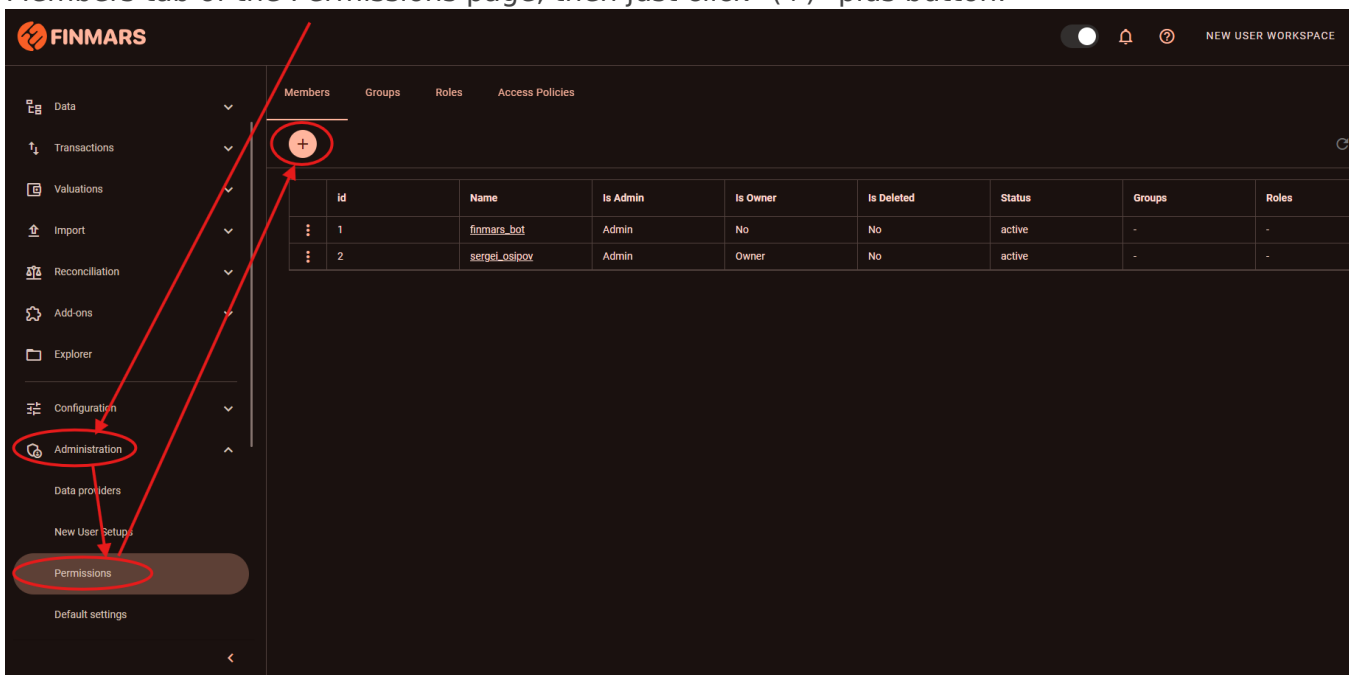
1. If needed: the VPN is configured to access the Finmars resources
2. If needed: access to the Virtual Machine to work with the sensitive information
3. Must have: registered in Finmars in the needed region environment (self-registered or registered by Finmars)
4. Must have: having permissions set to allow continue with the Action in the Guide
5. Must have: to create a new Workspace you must have a License Key (provided by Finmars)

Inviting a User into a Workspace

1. Ask the the User to sent you their Username.
 1. They can find their Username in the upper right corner of the Profile page
 2. That is the exact Username they use as a login
 3. Please refer to the [How to get Access to the Workspace](#) (points 1-3)
2. Go to the Profile page and click "Open" button on the card of the needed Workspace (you must have an access to the Workspace)



- You will be redirected to the Home page of the Workspace. You need to use the navigation menu on the left side: Administration -> Permissions, - you will be redirected to the Members tab of the Permissions page, then just click "(+)" plus button.



- You will be redirected to the Add Member page

FINMARS NEW USER WORKSPACE

Add member

General

Username
new_user

Email
new_user@company.com

☐ Admin

Groups

Roles

Personal Access Policies

Cancel Send

5. Fill in General section

1. username
2. e-mail

6. Setup user's permissions:

1. Full Access:

1. If you are adding a user with the full access to the workspace -> just click checkbox Admin, you may omit other selectors

2. Specific Access Policies

1. Groups -> Select from existing
2. Roles -> Select from existing
3. Personal Access Policies -> Select from existing

7. After you filled in user's info & selected user's permissions just click "Send Invite" button

FINMARS NEW USER WORKSPACE

Add member

General

Username
new_user

Email
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☒ Admin

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Cancel Send

8. You will be redirected to the Permissions page's Member tab, you will see that the user is now added to the members list with the status "invited".

FINMARS

NEW USER WORKSPACE

Valuations

Import

Reconciliation

Add-ons

Explorer

Configuration

Administration

Data providers

New User Setups

Permissions

Default settings

Recycle Bin

System

MembersGroupsRolesAccess Policies

	id	Name	Is Admin	Is Owner	Is Deleted	Status	Groups	Roles
	1	finmars_bot	Admin	No	No	active	-	-
	3	new_user	Admin	No	No	invited	-	-
	2	sergei_osipov	Admin	Owner	No	active	-	-

9. After the user received and accepted the invitation (refer to the [How to get Access to the Workspace](#) - points 4-5) their status will change to "active"