

Adding, changing roles, and removing users from Workspace

- Table of contents
- Adding Members and setting-up roles in Workspace
- Changing roles of a User in a Workspace
- Removing a User from a Workspace

You can add users that are part of your organization to your Portal/ Workspace/Base based on the access permission which you deem fit for them. If you want to work with someone within Zoho Tables, you can add someone to the Portal, Workspace, or the Base as a <u>Manager, Editor, or a Viewer.</u> A manager has access to all of the bases in a workspace, while an editor has access to only the bases shared with them within a workspace.

Adding Members and setting-up roles in Workspace

If you wish to add members to your Workspace rather than your Portal, use this option. From the Workspace listing page, click the **Add Member** icon. You can set up roles in your Workspace. Three types of access are available that you can set to your users: Manager, Editor, or Viewer.



Click on the **+ ADD MORE MEMBERS IN A DIFFERENT ROLE** to add more members and configure other access levels for them. Once done adding users and configuring the access types, click on **ADD USER** option. We have explained each access type in the previous section.

🙀 Karter Discover Corp 🗸	Q Find a base	8	Add member to the workspace Marketing
MY WORKSPACES +	Marketing	J ^E Modified Time V	
Marketing Nov 28, 2022			EMAIL ADDRESS
	Lead Generation Dec 07, 2022	: Content Stra Dec 07, 2022	Enter email addresses separated by commas
	Gull Market Research Dec 07, 2022	:	ACCESS TYPE O Editor •
			+ ADD MORE MEMBERS IN A DIFFERENT ROLE
			ADD MEMBER

Enter the email addresses of the user/users to be added, choose a role from the **ACCESS TYPE** drop-down list, and click **ADD USER**.

☆ Karter Discover Corp ∨	Q Find a base	8	Add member to the workspace Marketing
MY WORKSPACES	Marketing :	J ^a Modified Time V	
Marketing New 28, 2022	Lead Generation Dec 07, 2022	: Content Stra Dec 07, 2022	EMAIL ADDRESS
	Coll Market Research Dec 07, 2022	:	ACCESS TYPE () Editor •
			Manager *^ Editor Viewer
			ADD 1 MEMBER

To see if the user is added to the Workspace, click on the **Workspace Members** icon on the workspace listing page. The list of members that are in your Workspace will be listed along with their roles.

₩ Karter Discover Corp →	Q. Find a base	0
MY WORKSPACES +	Marketing :	
Marketing Nov 28, 2022	Lead Generation Content Strategy Dec 07, 2022 :	
	Dall Market Research Dec 07, 2022	

Changing roles of a User in a Workspace

Navigate to the Workspace listing page, and click the Workspace members option. Click more options from the users list and choose a required role for the role change.



Removing a User from a Workspace

Anyone with the capacity to manage roles can remove the user from your Workspace. To remove a user from the Workspace, go to the **Workspace Listing** page and click the **Workspace members** option. You can see the list of users in your Workspace, select the **More Options** button near the user you want to delete, and click the **Delete** option.

$\widehat{\mathfrak{G}}$ Karter Discover Corp \sim	Q Find a base	8	Members list for Marketing You have 5 members in your workspace
MY WORKSPACES +	Marketing :	J ^a Modified Time V	+ ADD MEMBER
Marketing Nov 28, 2022	Lead Generation	: Content Stra	YOU
	Dec 07, 2022	DBC 07, 2022	Olivia DIRECTOR DIRECTOR
	Market Research Dec 07, 2022	1	MANAGERS
			Eva eva.helms@zvlker.com :
			Delete User
			hazer from this Workspace?
			Justin.t@zylker.com
			Railey :