Creating and managing workspaces

Workspace

A workspace is a place where you and other members of the workspace can upload documents, reports and capture ideas and other information in Notes. By default, all the notes that you create are added to your personal space on Ideolve named My Space. Notes created in **My Space** are accessible only to you.

To collaborate over notes, you create shared workspaces and invite team members to join a workspace. Then you share a note with team members by first moving the note to a shared workspace and then sharing the note with members of the workspace.

When you share a note with others, you allow them to read the content of the note and other comments. You can also allow team members to post their own comments.

Launch the Workspace Manager

1. On the top of the Application bar, click the **Profile photo.**

2. Click the **Manage workspaces** option

3. Using the Manage Workspaces pane, you can

    a. **View & Update Workspace Details**

    b. **Create Workspace and Invite people to join**

    c. **Create Groups for easy sharing**

View & Update Workspace details

To see the workspace details, do the following:

1. **Launch the Workspace Manager**

2. Hover the mouse over a workspace name to view options on the left of the workspace name.

    a. **Hover over the** (i) icon to display the **workspace description.**

    b. Click on the **Membership icon** to view the Workspace invitee list and **make groups for easy sharing of**

notes

   c. Click on the **Pin workspace icon** to pin the workspace to the Application Bar

   d. Click on the three vertical dots icon to

      1. **Invite team members to the workspace**,

      2. **Edit the workspace details**

      3. **Update the Workspace controls**

Create Workspace and invite users to join a workspace

1. Launch the workspace manager.

2. At the bottom of the pane, click the Create Workspace **button.**

3. Give a **name** to the workspace.

4. Enter a **brief description** of the workspace.

5. Enter a **comma-separated list of email ids** to invite users to join your workspace.

6. The newly created workspace will be displayed in the list, and an email invite to join the workspace will be sent to invitees.

7. For **existing workspaces**, you can invite new people to join the workspace as follows:

   ○ At the bottom of the Workspace Manager, click the **Send Invitation** button.

   ○ **Select a workspace**.

   ○ Enter a **comma-separated list of email ids** to whom the invitation has to be sent.

   ○ An email invite will be sent to the users to join the workspace.

Create Workspace user groups

1. Workspace owners can create Groups within the workspaces. These group names can be used while sharing notes.

2. Only users who have accepted invitations to join a workspace can be added to a group.

3. Groups are not shared across workspaces.

4. To create a group do the following:

   1. Go to the workspace manager.

   2. Hover the mouse over a workspace name to view options on the left of the workspace name.

   3. Click on the Workspace users icon to open the workspace members and groups list.

   4. On the left pane, select the **Groups** tab.

   5. Click the **Create group button** to open a pop-up window.

   6. On the right pane,

1. Give a **name** to the group

2. Give a **brief description** of the group

3. Enter a **comma-separated list of email ids** that need to be added to the group **OR**

4. Click the down arrow button to open the list of workspace users, where you can **select the members to be added** to the group