Workspace Admin

Inviting Teammates and Assigning Roles

Last updated: May 12, 2026 · 6 min read · Article ID HC-1108

Adding teammates is one of the first things you'll do in a new Trailmark workspace. This article covers how to invite people individually, how to bulk-invite, what each role means, how to manage pending invitations, and how invitations work when your workspace uses SSO.

Who can invite teammates?

Only members with the *Admin* or *Workspace Owner* role can send invitations by default. Owners can change this in **Settings → Members → Invitation policy —** for example, allowing Editors to invite people to specific projects only.

1. Invite a single teammate

1. From the sidebar, go to **Settings → Members**.
2. Click **Invite people** in the top-right.
3. Enter the email address of the person you want to invite.
4. Choose a role from the dropdown (see the role reference below).
5. Optionally, restrict access to specific projects using the **Project access** selector.
6. Click **Send invitation**. The invitee will receive an email with a link valid for 14 days.

2. Bulk-invite multiple teammates

To onboard a whole team at once:

1. Open the same **Invite people** dialog.
2. Click **Bulk invite**.
3. Paste a list of email addresses, one per line. All invitees in a single bulk action will receive the same role and project access.
4. Optionally, attach a short note that will be included in the invitation email.
5. Click **Send invitations**. You can send up to 200 invitations in a single bulk action.

Tip: For organizations larger than ~50 people, we recommend connecting your identity provider with SCIM provisioning instead. Provisioned users are added automatically when they're assigned the Trailmark app in your IdP. See "Setting up SCIM" in Related articles.

3. Role reference

Workspace Owner
Full access to everything in the workspace, including billing, plan changes, and deleting the workspace. There's always at least one Owner. Transfer ownership before removing the last Owner.

Admin
Manages members, settings, security, and integrations. Cannot manage billing or delete the workspace.

Editor
Creates and edits projects, documents, automations, and reports. Cannot manage members, settings, or billing.

Viewer
Read-only access to projects they're a member of. Cannot create or edit anything. Useful for executives, auditors, and external reviewers.

Guest
External collaborator. Access is limited to specific projects you share with them; cannot see the rest of the workspace. Guests don't count against your paid seat total.

4. Manage pending invitations

Invitations stay in the **Pending** tab of **Settings** → **Members** until accepted. From there you can:

- **Resend** an invitation if the recipient missed the original email.
- **Copy invitation link** to share it directly through Slack, Teams, or another channel.
- **Change role or project access** before the invitee accepts.
- **Revoke** an invitation that was sent in error.

Invitations expire after 14 days. Expired invitations show in the Pending list with a red badge; resending them generates a fresh 14-day window.

5. SSO and SCIM workspaces

If your workspace uses SAML SSO with just-in-time provisioning, new users are created the first time they sign in through your IdP — you don't need to send invitations in advance. With SCIM enabled, user lifecycle is managed entirely from your IdP, including role assignment via group mapping.

You can still send manual invitations to Guests, who are external to your SSO domain.

6. Common questions

- **Can I change someone's role after they accept?** Yes — Admins and Owners can change roles at any time from **Settings** → **Members**.
- **Will billing change when I invite more people?** On per-seat plans, paid seats are billed at the next invoice date. Guests are free.
- **What happens if I delete a member?** Their content (projects, documents, comments) stays in the workspace. They lose access immediately and any active sessions are terminated within 10 minutes.

Related articles

- Setting up SAML SSO
- Setting up SCIM provisioning
- Managing project-level access
- Billing and seat counts