Send and Manage Invitations

September 10, 2026

Send and Manage Invitations

Use organization invitations to give collaborators access to Atloria without sharing existing user credentials. This page explains how to send invitations, monitor pending invitations, and help invited users complete access setup.

Overview

Invitations are used when you need to add a new collaborator to your organization or workspace. Administrators typically send an invitation to the collaborator's email address, select the appropriate access level, and then monitor the invitation until the collaborator accepts it.

Invited users receive an invitation link that opens the Atloria invitation screen. On that screen, they may be asked to provide the access token included with their invitation. The visible field is labeled **Enter access token**.

Pending invitations are useful when a collaborator has not yet completed setup. Review pending invitations regularly so you can resend an invitation when necessary, remove invitations that are no longer needed, and avoid leaving access requests open for people who should not join the organization.

> 📷 *Screenshot pending: Organization invitation management screen showing sent and pending invitations.*

Prerequisites

Before you begin, make sure you have:

- Administrator permission to manage organization access.
- The collaborator's correct email address.
- A confirmed understanding of the access the collaborator should receive.

- Access to the relevant organization or team settings.
- A secure way to share any required access token with the invited collaborator.
- A plan for reviewing invitations that remain pending.

Step-by-Step Instructions

Send an invitation

1. Open the organization or team area where access is managed.
2. Select **Manage in Settings** when it is available.
3. Open the invitation or team-access area in Settings.
4. Select the control for creating or sending an invitation.
5. Enter the collaborator’s email address in the email field.
6. Select the access level or role that the collaborator should receive.
7. Review the invitation details before sending them.
8. Select the button that sends the invitation.
9. Confirm that the new invitation appears in the pending invitation list.
10. Record why the collaborator was invited in your team’s normal access-review process.

> 📷 *Screenshot pending: Invitation form with email address, access selection, and send action.*

Help an invited collaborator join

1. Ask the collaborator to open the invitation link they received.
2. Ask the collaborator to enter the invitation access token in **Enter access token** if that field is displayed.
3. Ask the collaborator to submit the token and continue through the invitation process.
4. Verify that the collaborator can access the intended organization resources after accepting the invitation.
5. Review the invitation list to confirm that the invitation is no longer pending.

Manage pending invitations

1. Open the organization or team access settings.
2. Locate the list of invitations that are still pending.
3. Review the recipient email address for each pending invitation.
4. Check whether the invitation is still required.
5. Resend the invitation when the recipient did not receive it or cannot locate it.
6. Cancel or remove the invitation when the recipient no longer needs access.
7. Review access again after the collaborator joins to confirm that their access level is appropriate.
8. Use **Team Activity** to review relevant team changes when your organization makes that view available.

Tips and Best Practices

- Send invitations only to verified email addresses. A typo can send an access request to the wrong person and delay onboarding.
- Use the lowest level of access that allows the collaborator to complete their work. If your organization uses role-based controls, review access against your **Role-Based Access Control (RBAC)** practices before sending the invitation.
- Treat access tokens as sensitive information. If a collaborator is asked to use **Enter access token**, share the token through an approved secure channel rather than placing it in public chat messages or unprotected documents.
- Review pending invitations on a regular schedule. An invitation that remains pending may indicate an incorrect email address, a delivery issue, or a change in staffing.
- Remove invitations that are no longer needed. This is especially important for contractors, temporary project members, or collaborators whose work has ended.
- When you manage access for multiple environments or versions, verify that the collaborator is being added to the correct area. You may see options such as **Manage all versions** → or 🕒 **Go to Version Manager** in areas where version access is relevant.

- Keep team notes focused on the access decision. Where available, use **Add any notes for the team...** to document why access was granted, changed, or removed.

Related Pages

- Manage Team Access
- Role-Based Access Control (RBAC)
- Review Team Activity
- Manage Version Access Control
- Application Security & Access Control

Troubleshooting

The invited collaborator cannot continue past the invitation screen

Ask the collaborator to confirm that they opened the complete invitation link. If the screen displays **Enter access token**, ask them to enter the token provided with the invitation and try again. If the token is unavailable or suspected to be incorrect, cancel the pending invitation and send a new one through your approved process.

The invitation is still pending

Confirm that the recipient email address is correct. Ask the recipient to check spam, junk, and email filtering folders. If they cannot find the invitation, resend it from the pending invitation list. Remove the original invitation if your organization's process requires only one active invitation per person.

The collaborator joined but has the wrong access

Review the collaborator's assigned role or access selection in the organization's access settings. Update the access level to match their current responsibilities, and use **Team Activity** to confirm that the change was recorded if that screen is available.