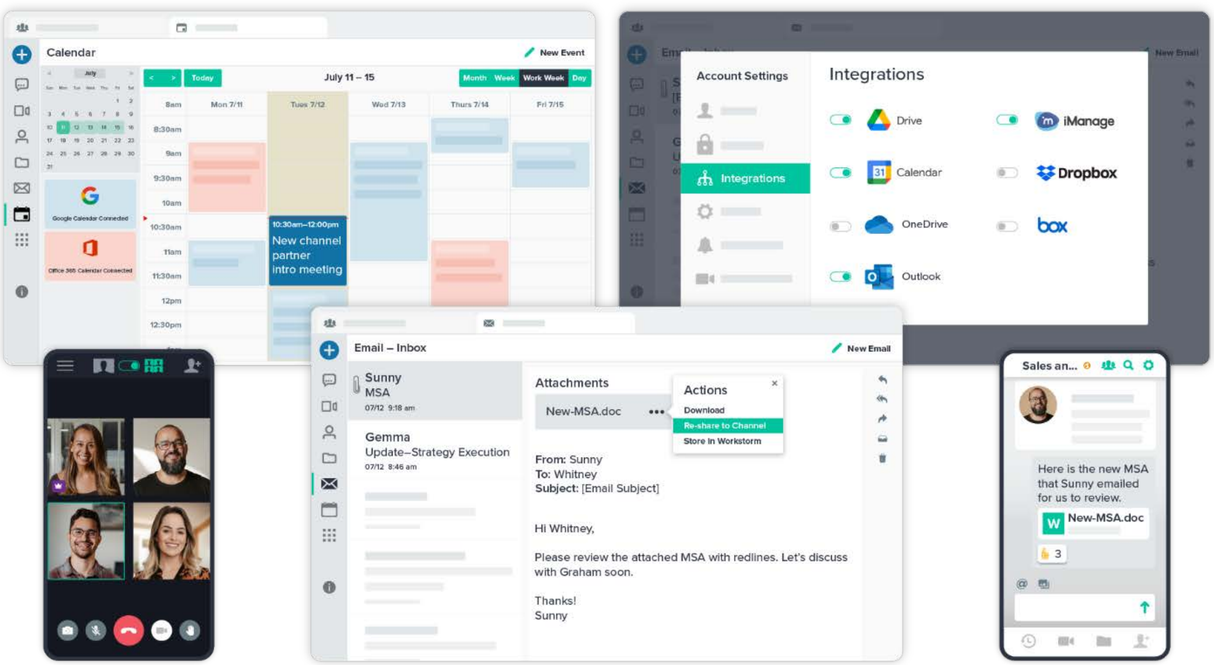
Admin Guide



Version 9-19-24

WORKSTORM

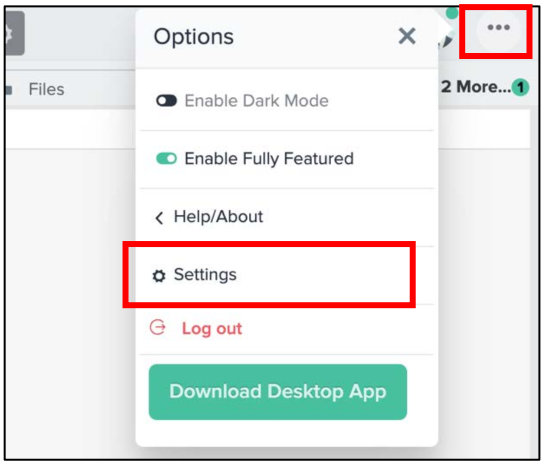
Admin Guide

COMPANY DETAILS

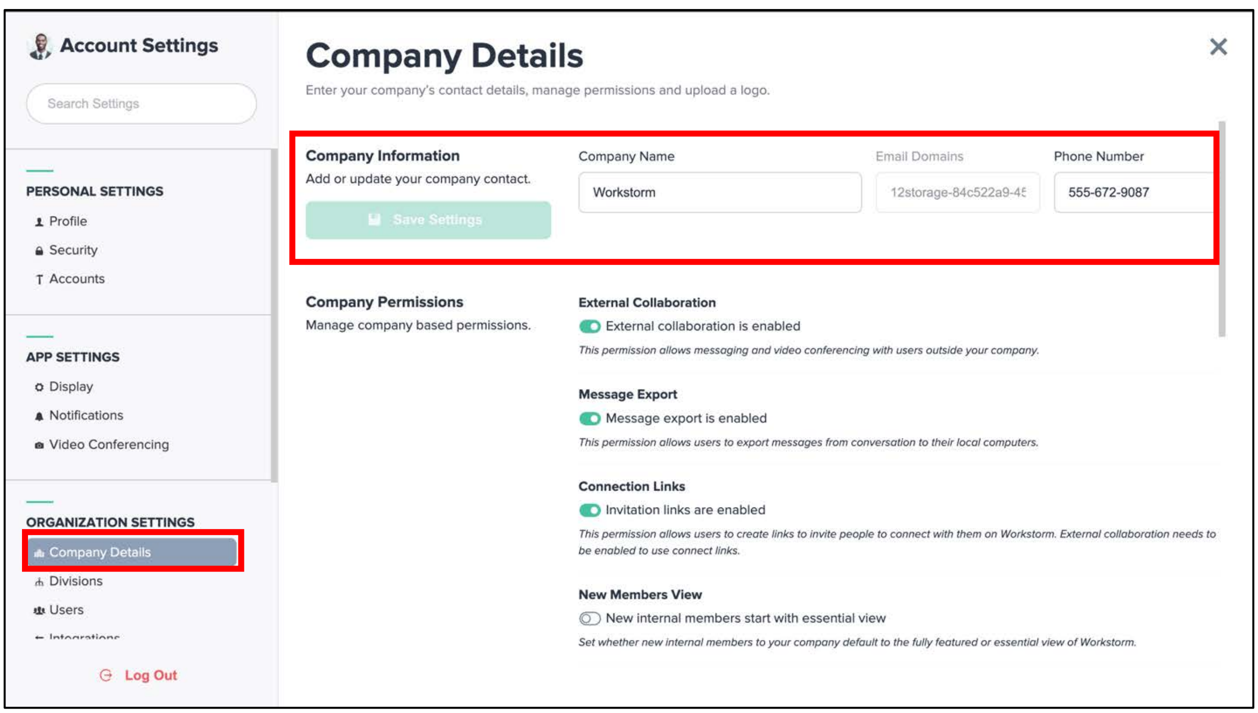
Customize your company profile, permissions, and security preferences.

Company Branding

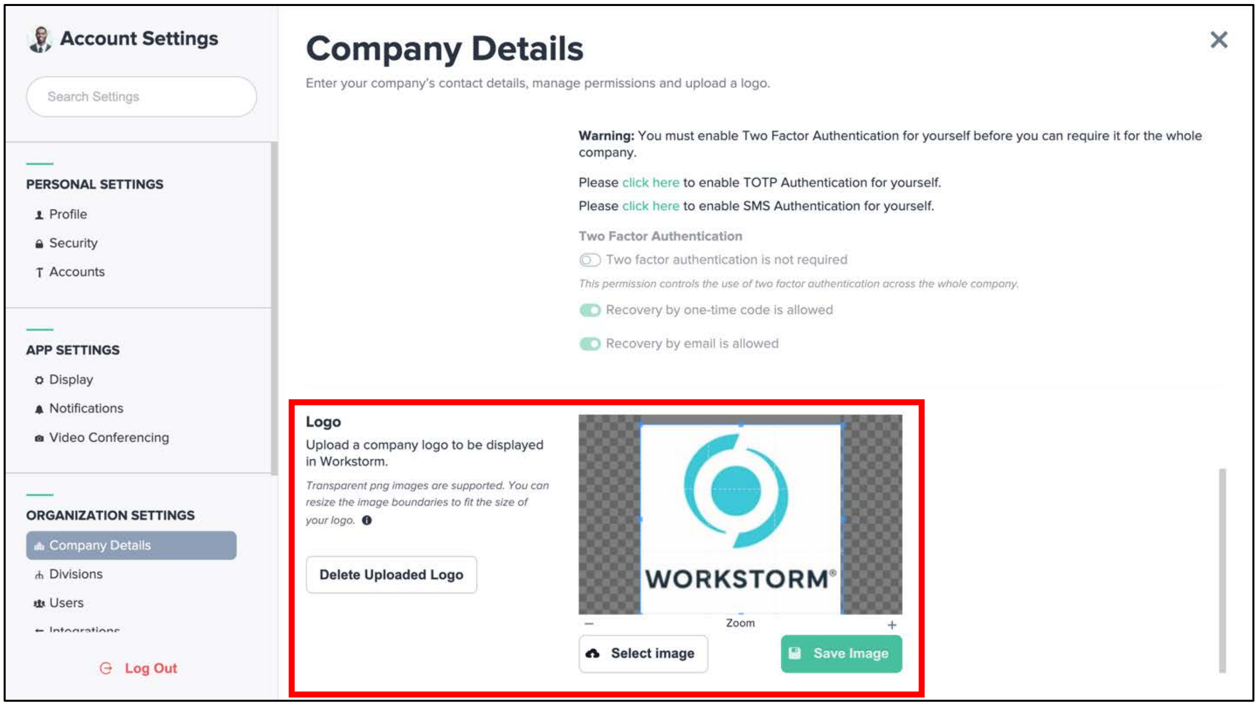
1. Go to *Settings*, and under *Organization Settings*, click **Company Details**



2. Enter your company name and add a phone number

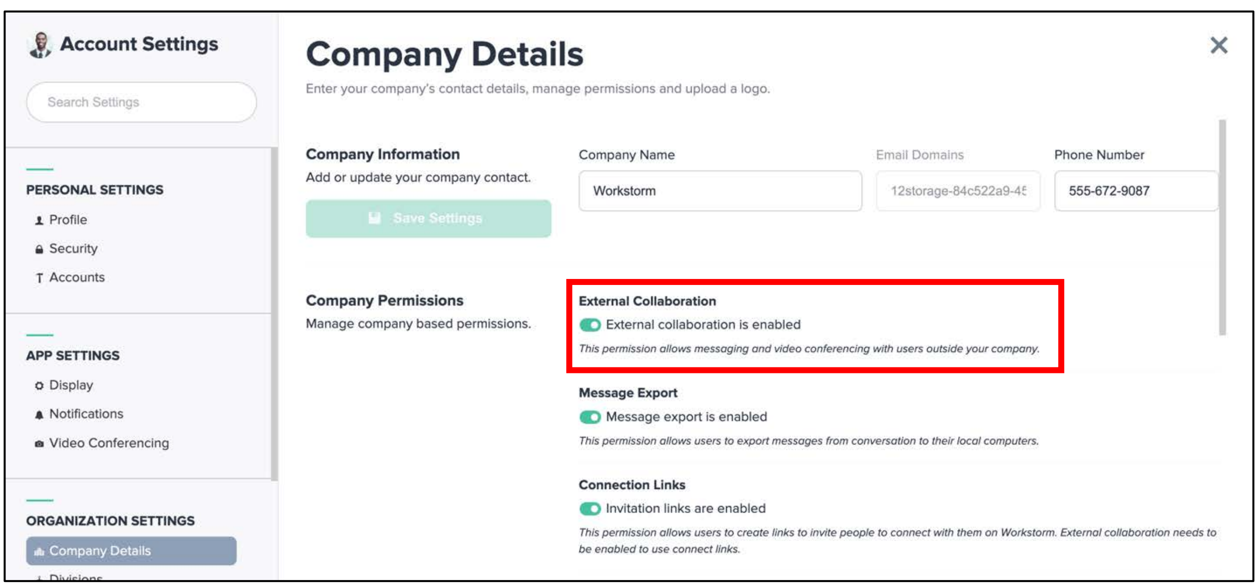


3. Upload a company logo to be displayed in the top-left corner of your Workstorm



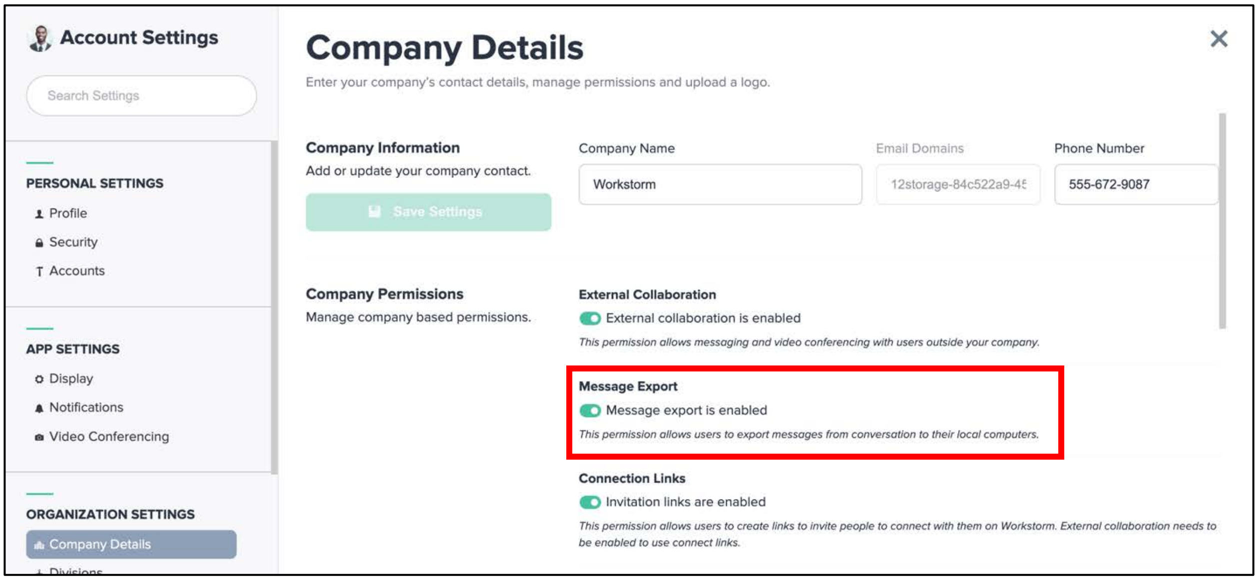
External Collaboration Settings

Toggle on **External Collaboration** to allow members of your company to invite and collaborate with external guests.



Message Exporting

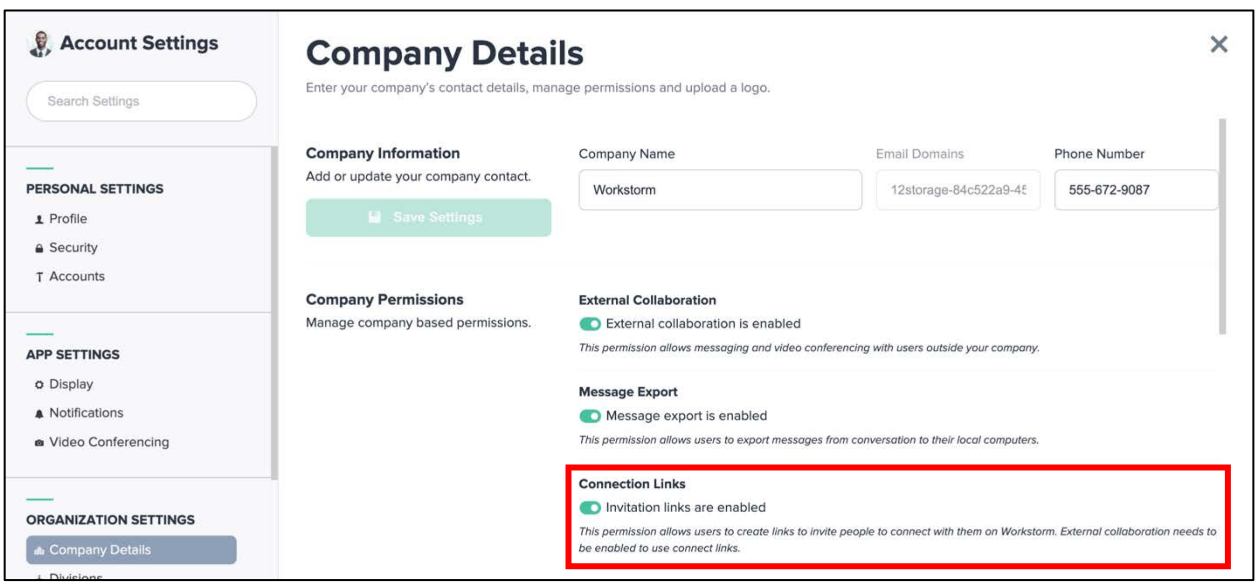
Toggle on to **Message Exporting** to allow members of your company to download message data from their conversations.



Connection Links

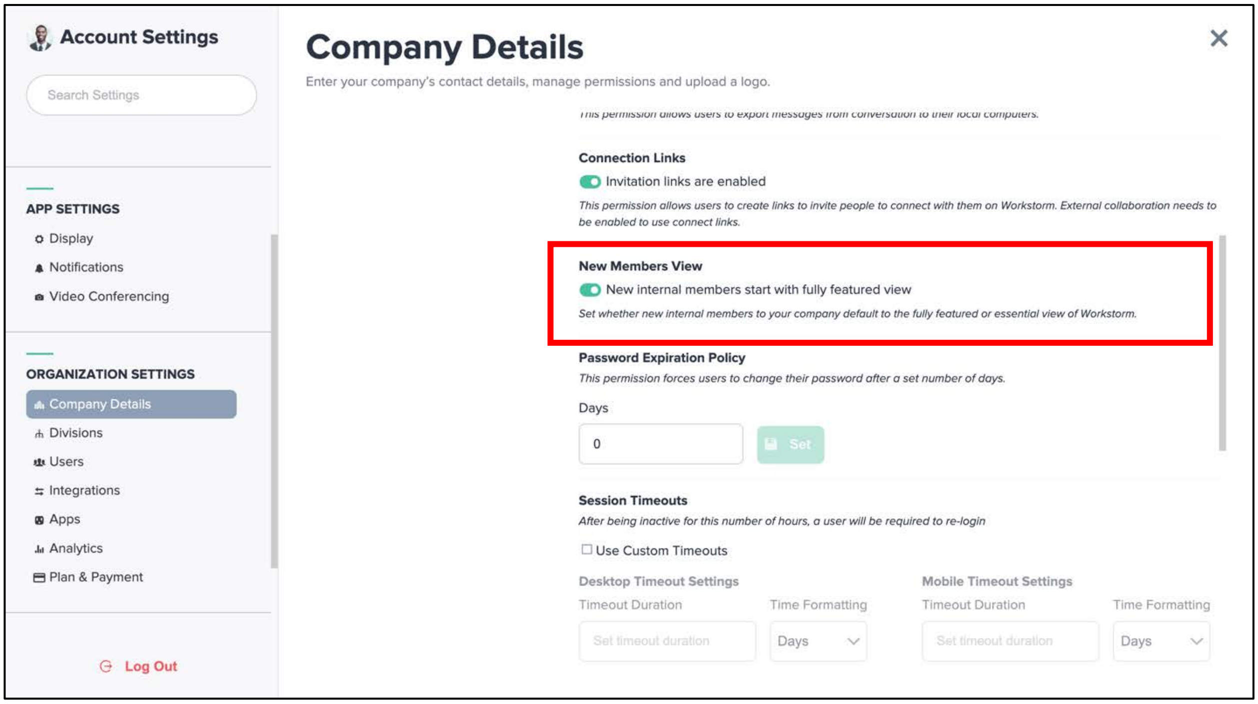
Toggle on **Connection Links** to allow members of your company to use connect links to invite people to the platform.

NOTE: External collaboration needs to be enabled to use connect links.



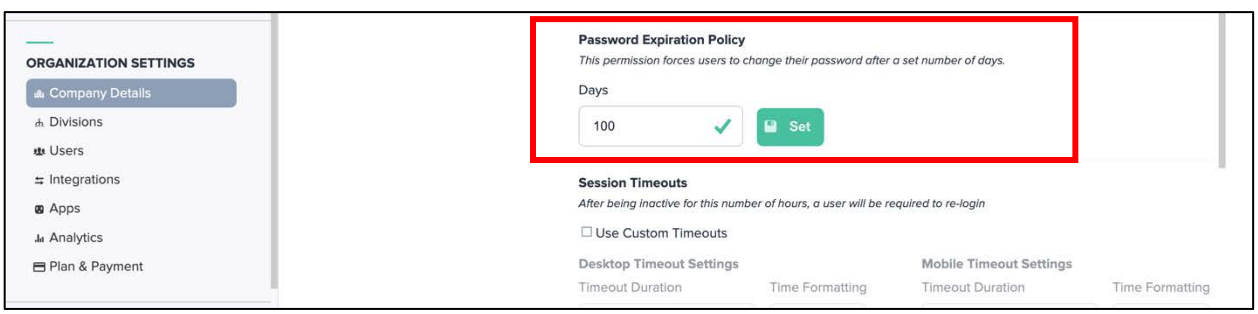
New Member View

Toggle on **New Member View** to make new internal members default to *fully featured view*, which adds more features like *Workspaces* and *Email* to the left sidebar. To have members of your company default to *essential view*, which simplifies the left sidebar to *Messages*, *Connections*, *Meetings*, *Files* and *Calendar*.



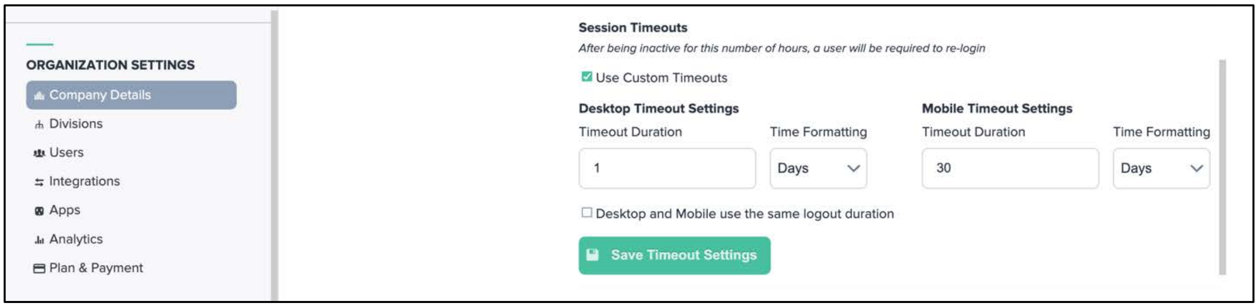
Password Expiration Policy

Use the provided input to set a password expiration policy for all members. Set the number of days until member passwords will expire and will need to be reset.



Session Timeouts

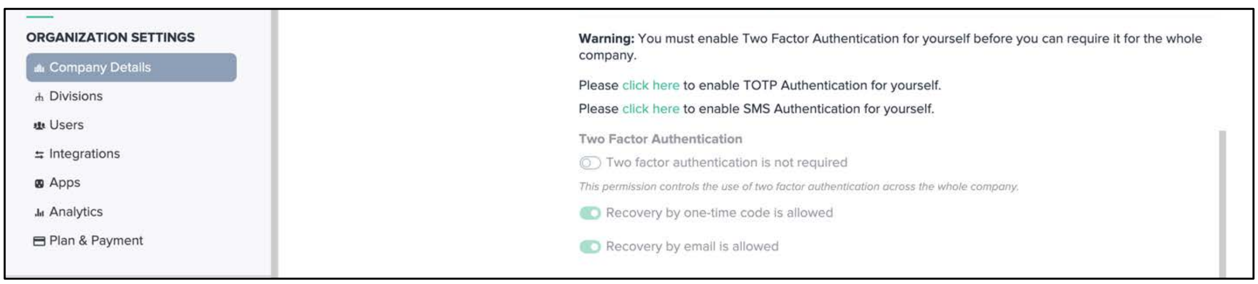
For both Desktop and Mobile, set a time duration in hours or days for how long the user can stay inactive before being logged out. Customize **Desktop** and **Mobile** timeout settings separately, or check the box to make them the same.



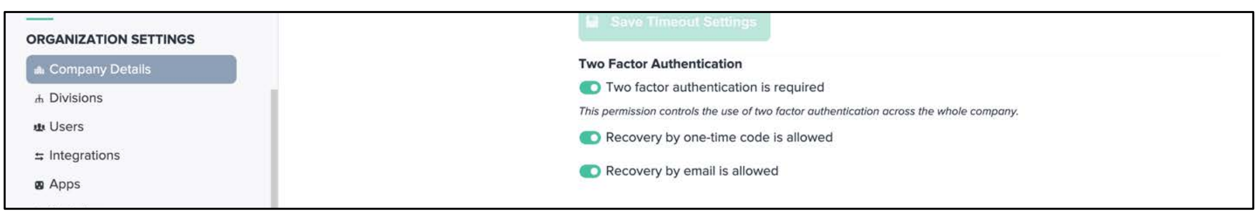
Two Factor Authentication (2FA)

Before enabling 2FA for the company, you must first enable it for yourself.

1. Choose between TOTP (using the Google Authenticator app) or SMS authentication (receiving a text message)



2. Click the toggle to require 2FA for company members
3. Further customize 2FA settings by updating recovery code options



WORKSTORM

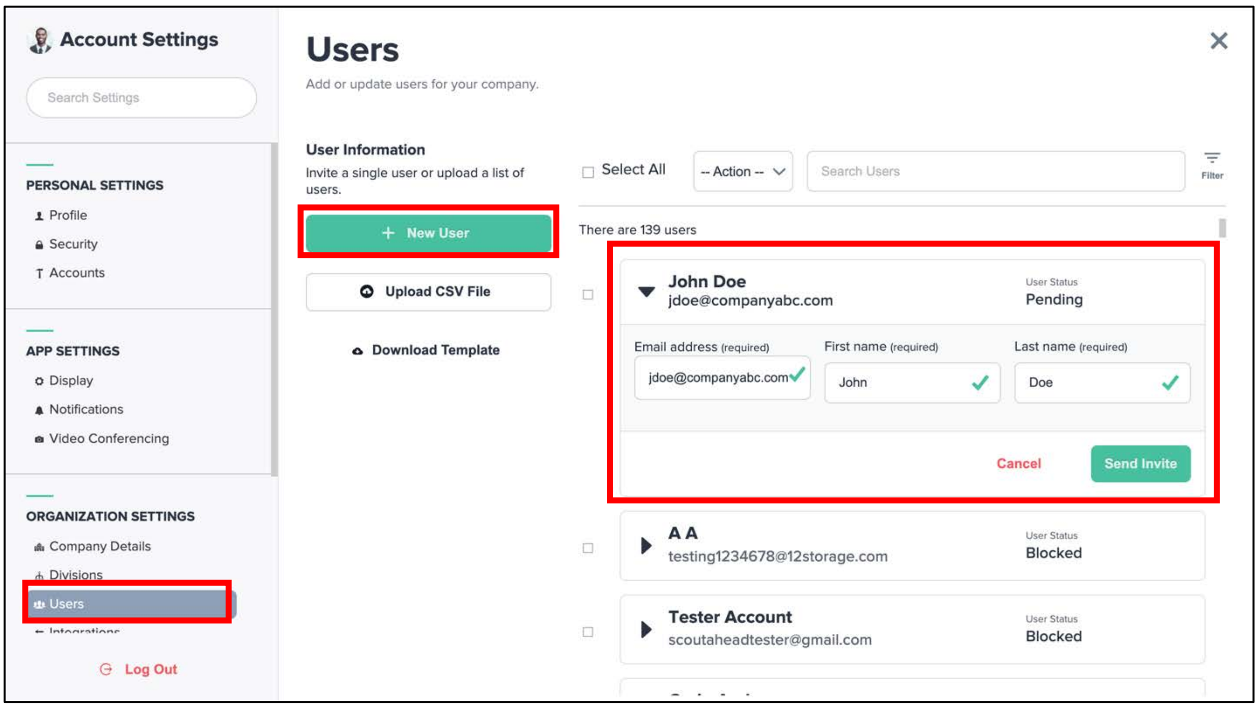
USERS

Company Admins can invite new internal members on an individual basis or in bulk. Once invited, new members will receive an email invitation to join the company from support@workstorm.com.

Inviting Internal Members

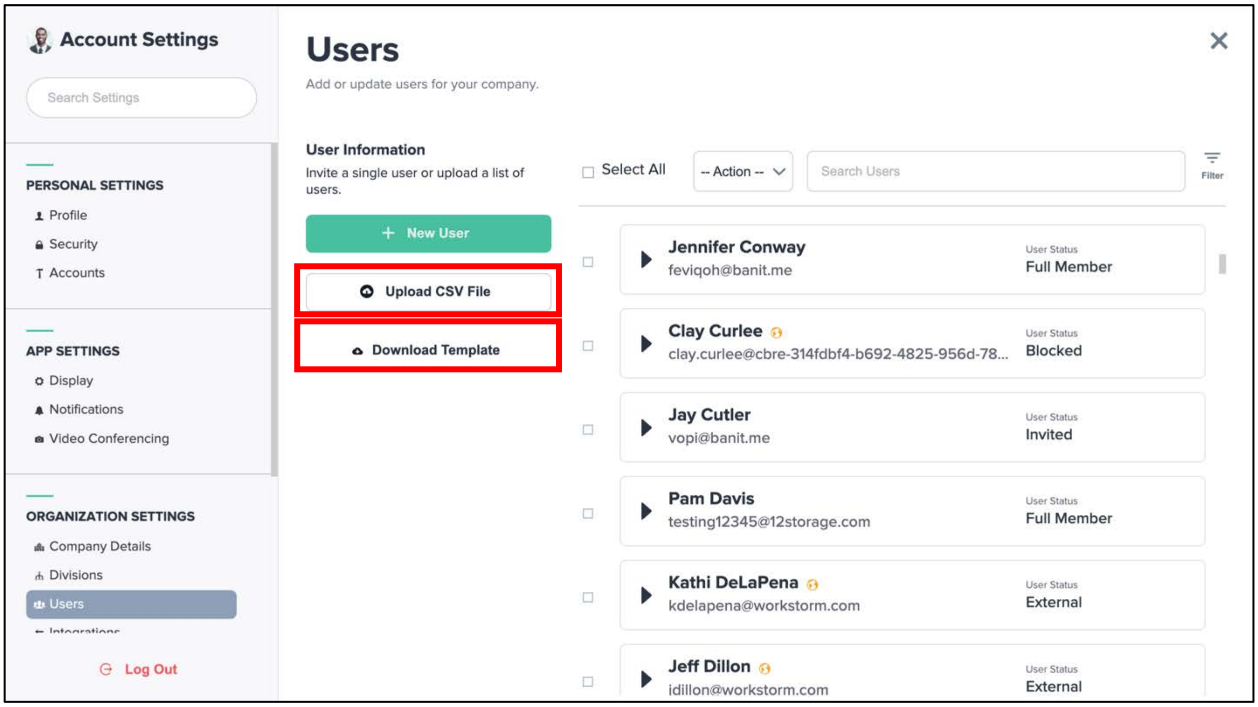
1. Go to *Settings*, and under *Organization Settings*, click **Users**
2. Click the green **New User** button
3. Type the person's email address and name
4. Click **Send Invite** to issue an email invitation

NOTE: If someone is invited individually from within the Users settings menu, they will be added as an internal company member.



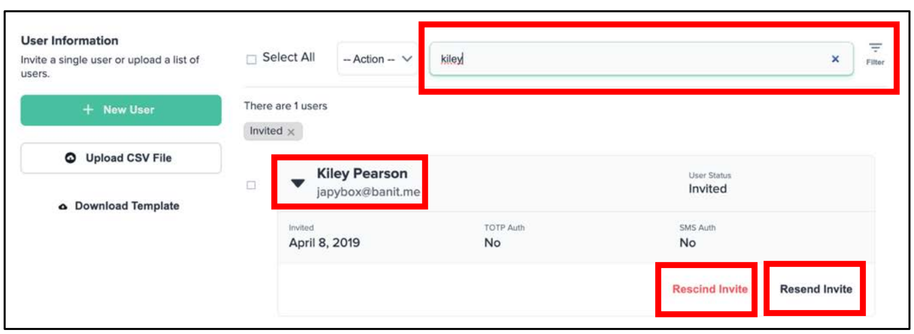
There is also an option to invite members in bulk:

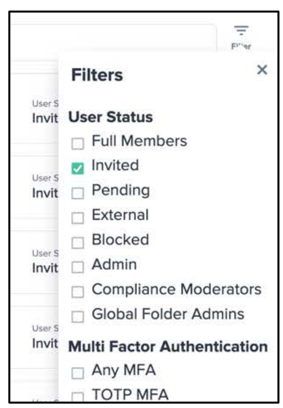
1. Click **Download Template** to download a formatted spreadsheet
2. In the spreadsheet, enter the details of the colleagues you wish to add to your company
3. Save the file in CSV format, then click **Upload CSV File** and upload the file



Managing Invites

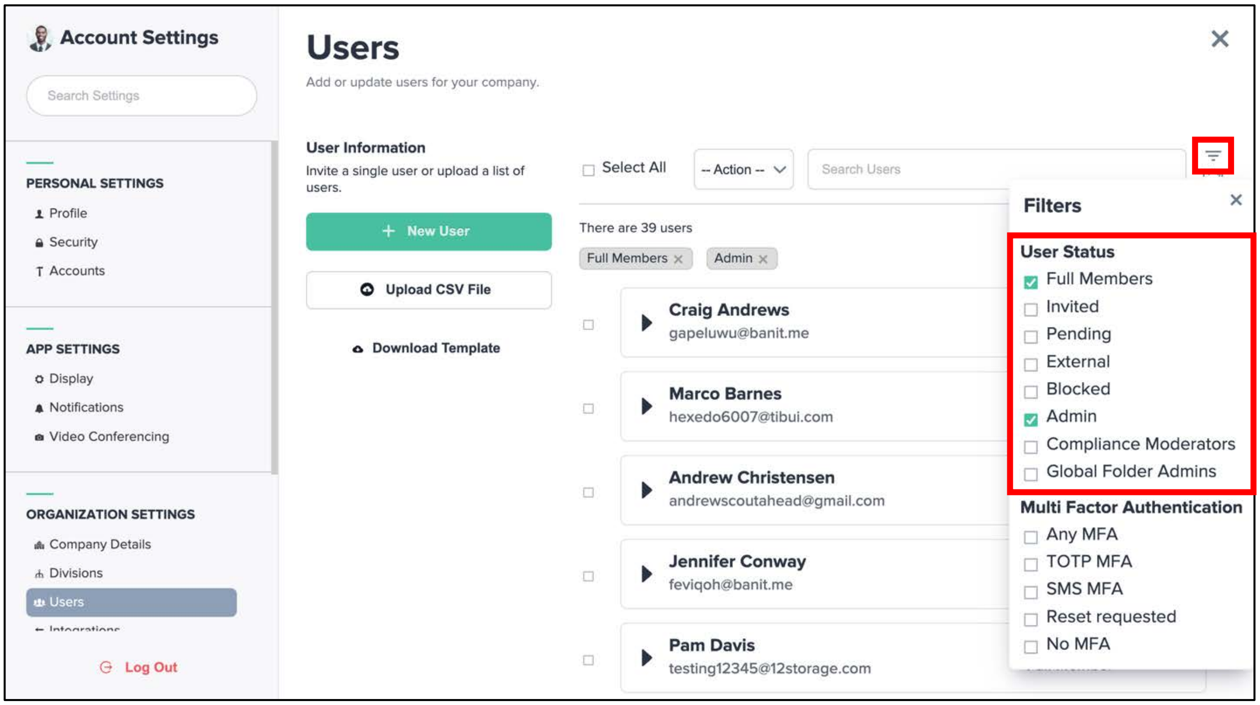
At the top of your screen, use the *search users bar* to find a colleague with an outstanding invitation. To see all outstanding invitations, use the filter option to select *Invited*. Click the dropdown arrow to the left of the colleague's name. Then, choose to **Rescind** or **Resend** the invitation.



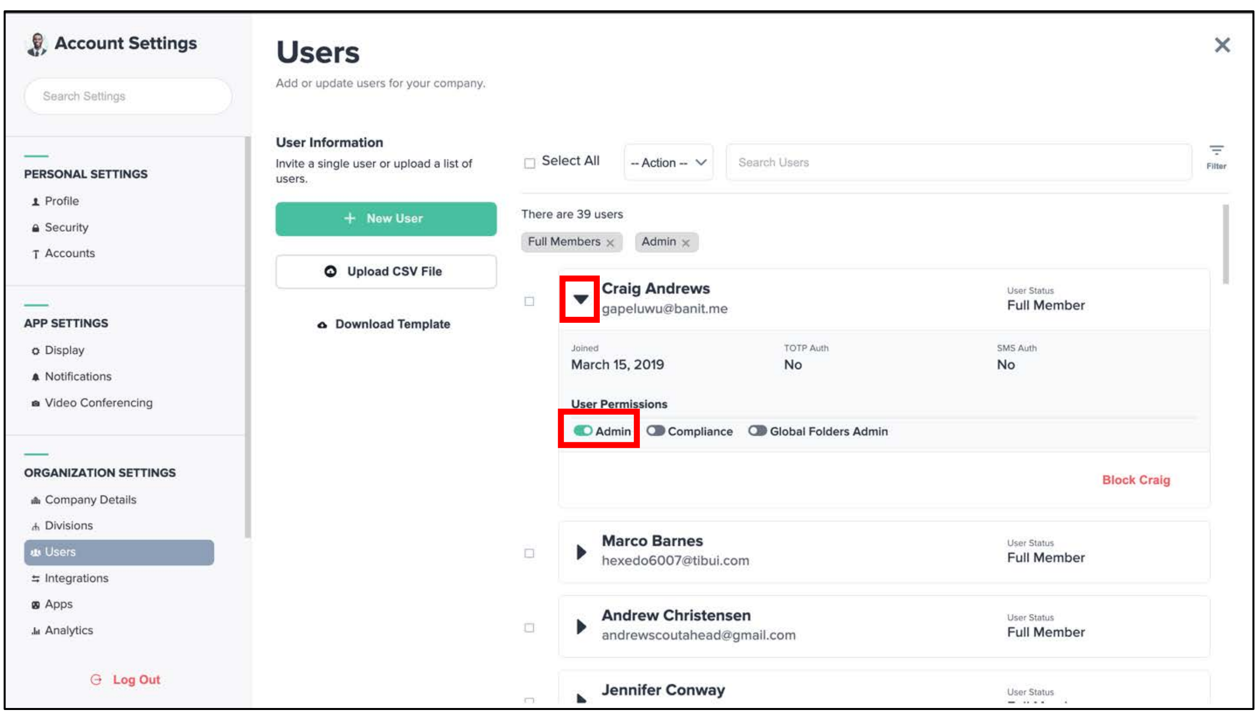


Managing Members

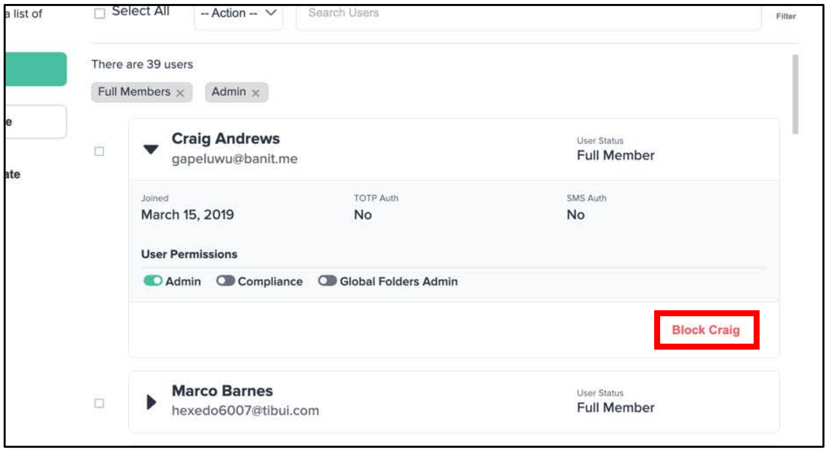
Look up users in the search bar at the top-right. Use the filter menu to sort members by their status in the company, such as *Full Members*, *External*, *Blocked* or *Admin*.



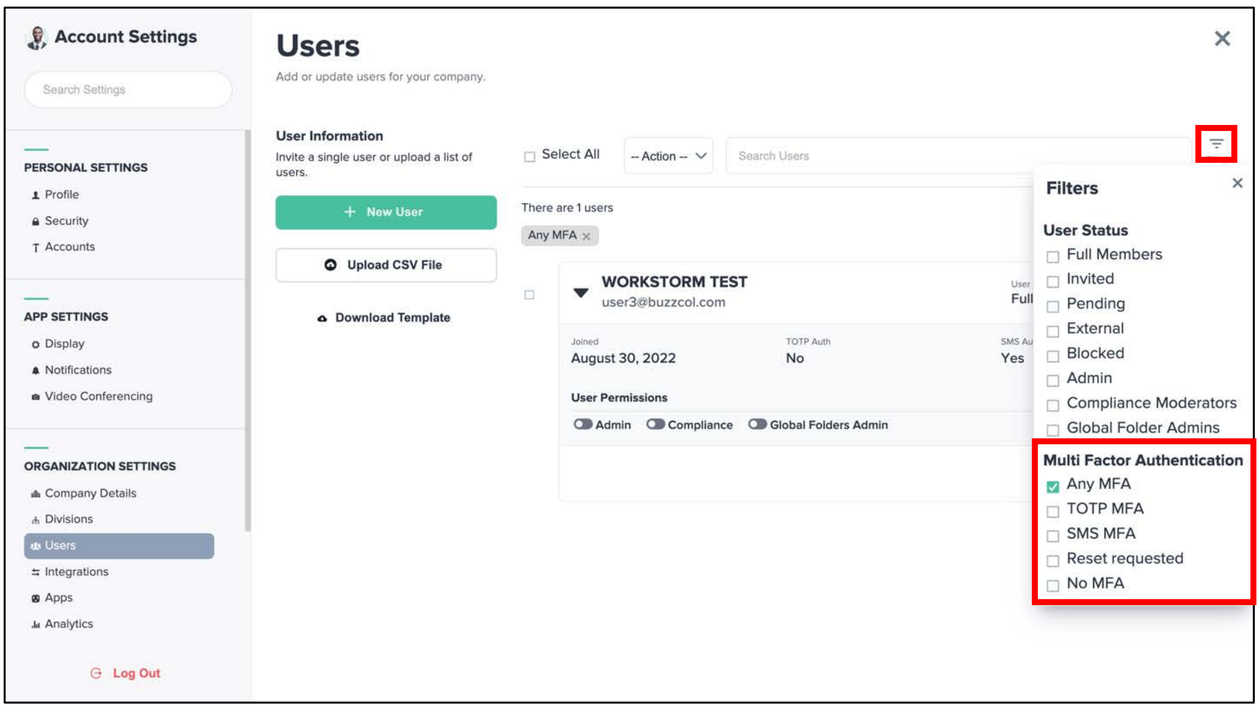
Click the dropdown arrow to the left of the user's name to see more information, as well as grant or remove Admin privileges.



Click **Block** to bar a member from accessing the company's Workstorm.

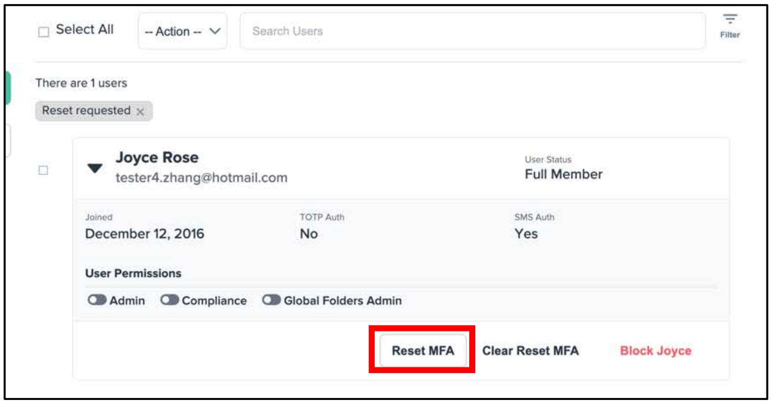


Company Admins can review the members that have 2FA enabled and which 2FA method they are using (SMS or TOTP). Use the top right filter menu to sort by 2FA status such as *TOTP*, *SMS* or *Reset Requested*.



If a member requests to reset their 2FA, click **Reset MFA**.

NOTE: Only Company Admins can reset 2FA.



DIVISIONS

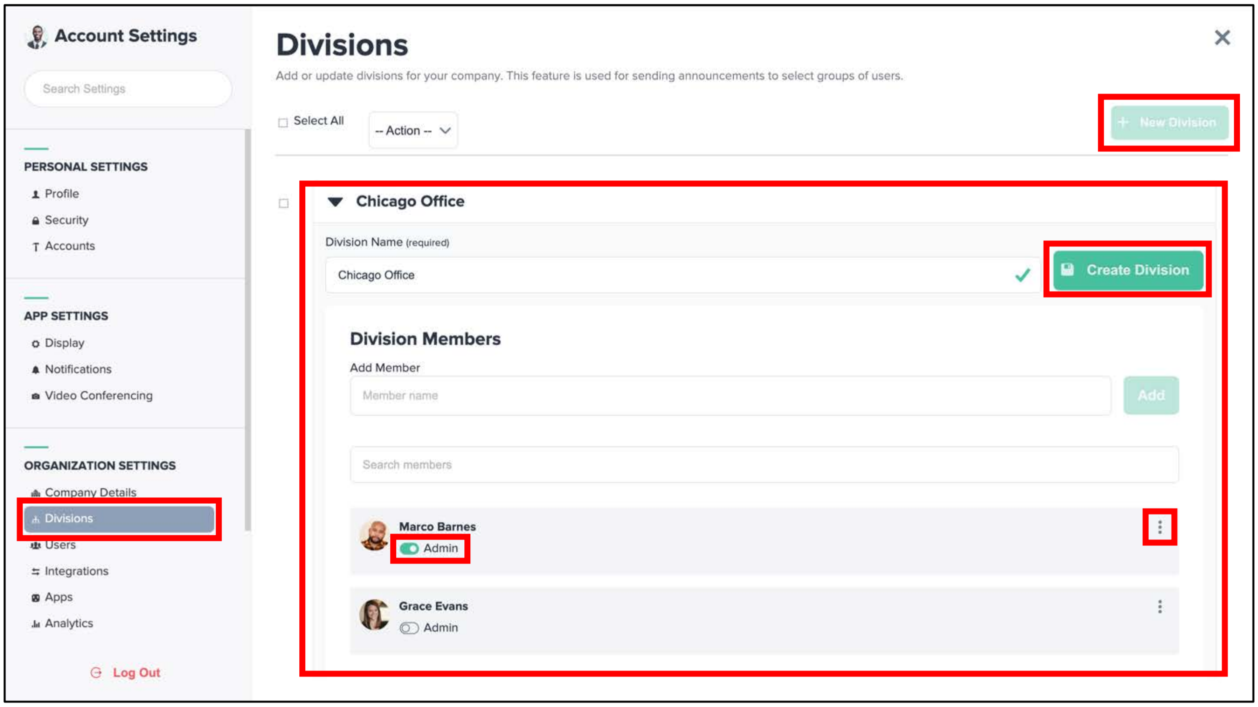
Create *Divisions* for your company to send one-way *Announcements* to select groups of members. *Divisions* may mirror a company's departments, offices, or geographies, and are created by the Company Admin.

Creating Divisions

1. Go to *Settings*, and under *Organization Settings*, click **Divisions**
2. Click the green **+ New Division** and enter a name
3. Search for members to add to the *Division* using the *Add Member* input, then click the green **Add** button
4. Grant Division Admin privileges by clicking the **Admin** toggle below the member's name

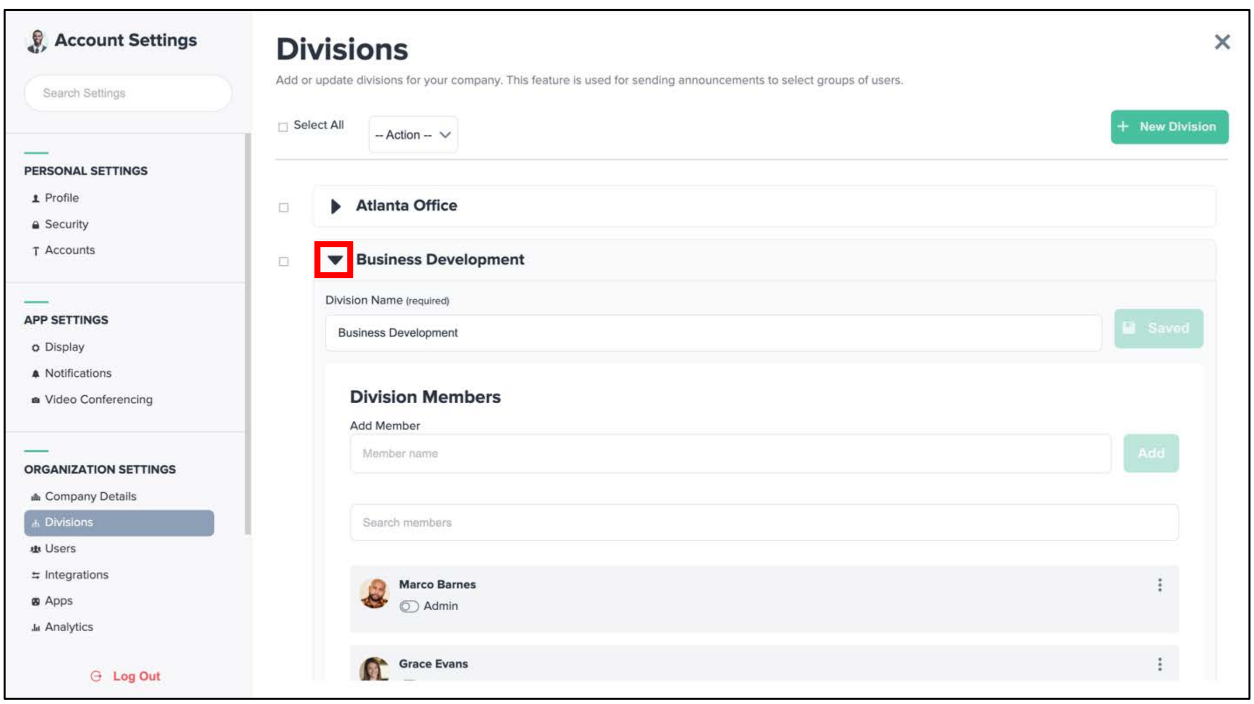
NOTE: Division Admins can send one-way messages in their respective Division Channels, while Company Admins can send messages in all Divisions and do not need to be a division admin to do so.

5. To remove members from a Division, click the **ellipsis** to the right of an existing member's name and select **Remove User**
6. Click the green **Create Division** button

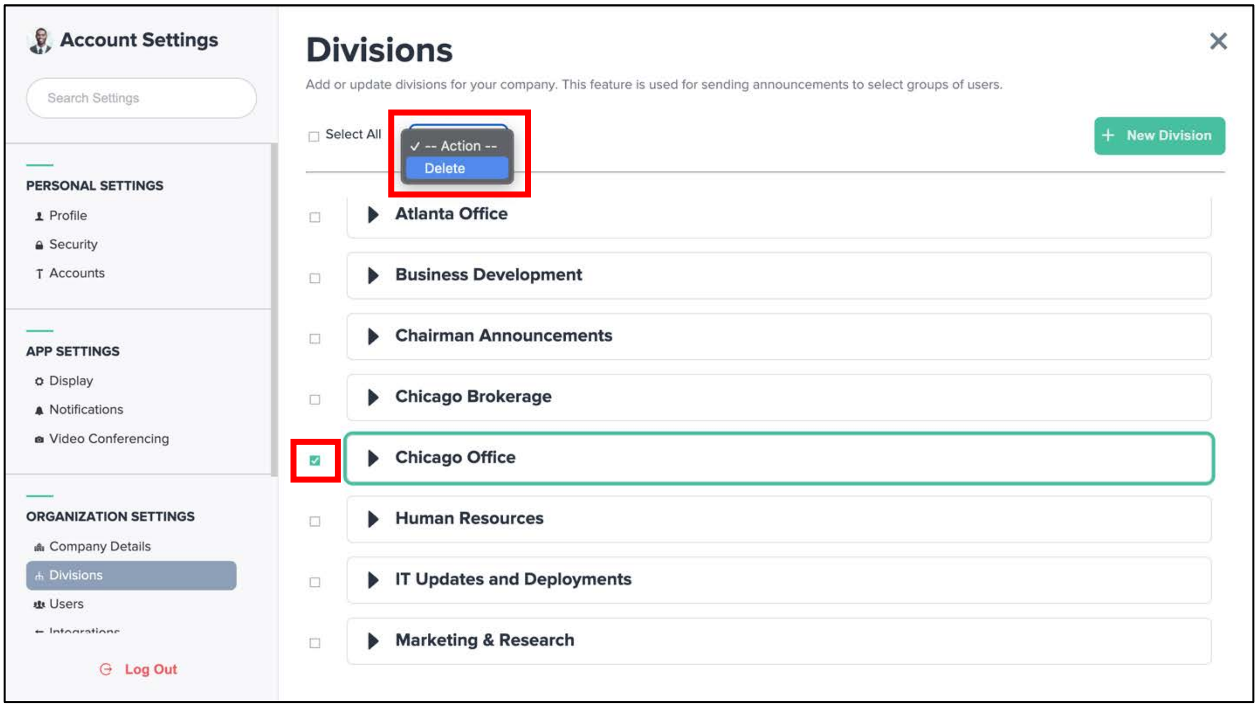


Managing Divisions

If you want to make changes to an existing Division's name, members and/or admins, click the dropdown arrow to the left of that division name.



To delete a *Division,* by check the box to its left. Then, click the **Action** dropdown menu at the top of your screen and select **Delete**.

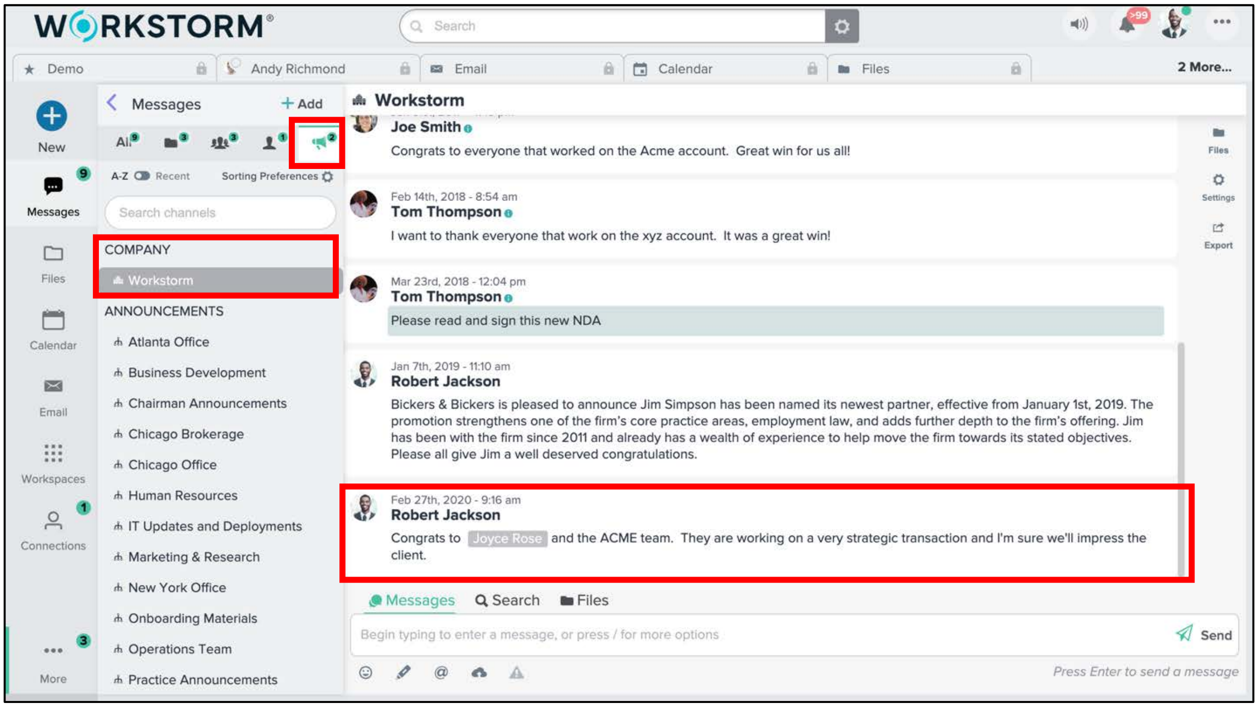


ANNOUNCEMENTS

Announcements enable company leadership to send one-way messages and files company wide.

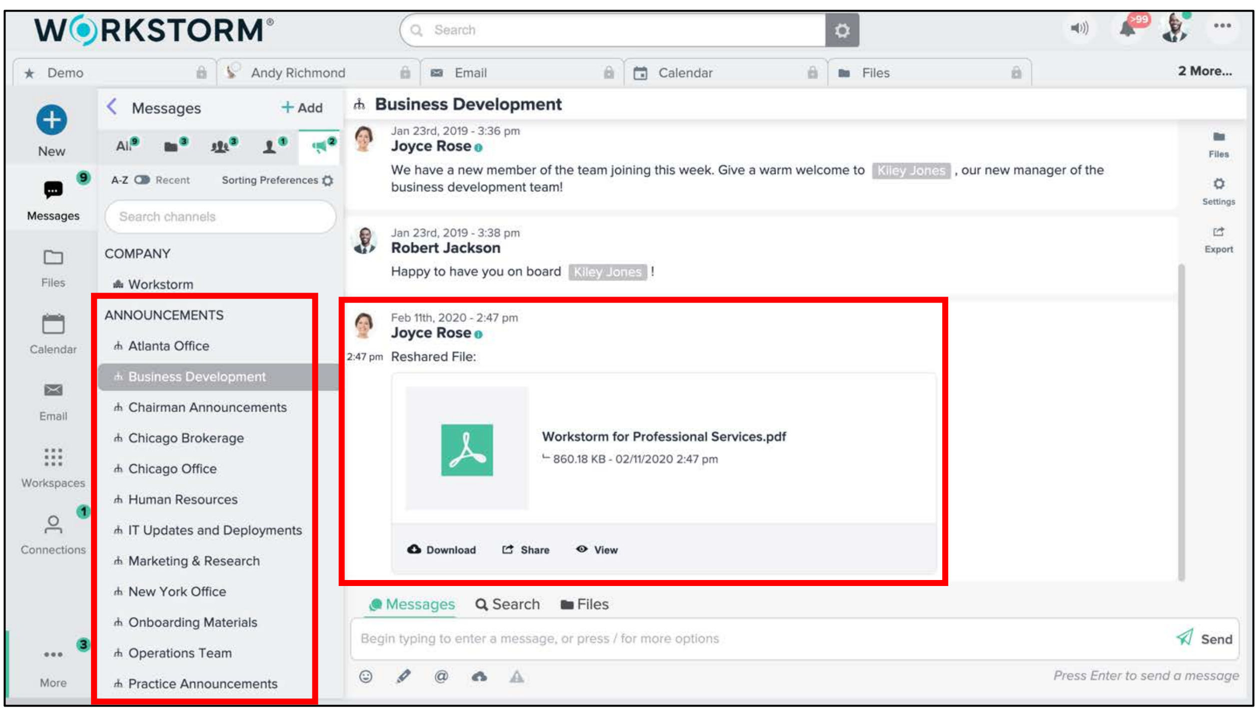
Company Announcements

Click on the **Messages** icon from the left sidebar. Then, select the **Announcements** tab at the top of the *Messages* sidebar. Under Company, select the Announcement Channel. Then, send a message and/or files to all internal members of your company.



Division Announcements

Below the *Announcements* header, select a Division to send a message and/or files to all members of the division.

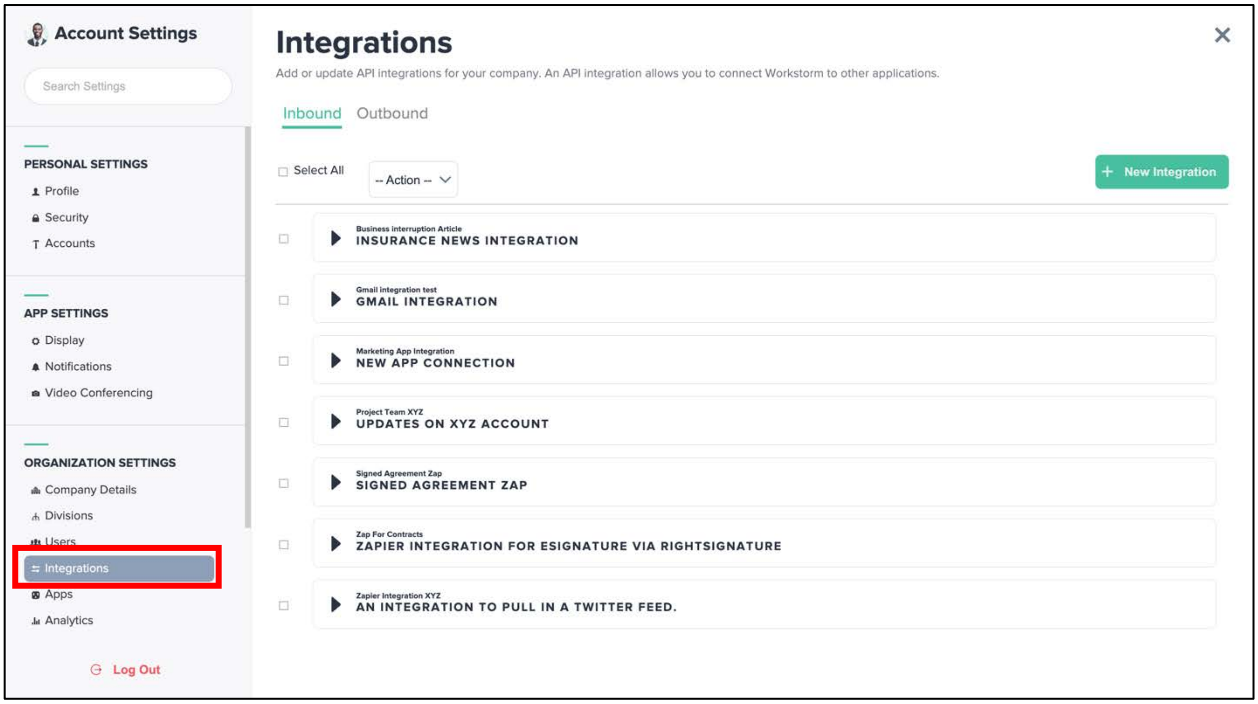


WORKSTORM

INTEGRATIONS

Add or update inbound and outbound API Integrations for your company. An *API Integration* allows you to connect Workstorm to other applications, like Zapier, for example.

To manage your integrations, go to *Settings*, and under *Organization Settings*, click **Integrations.**



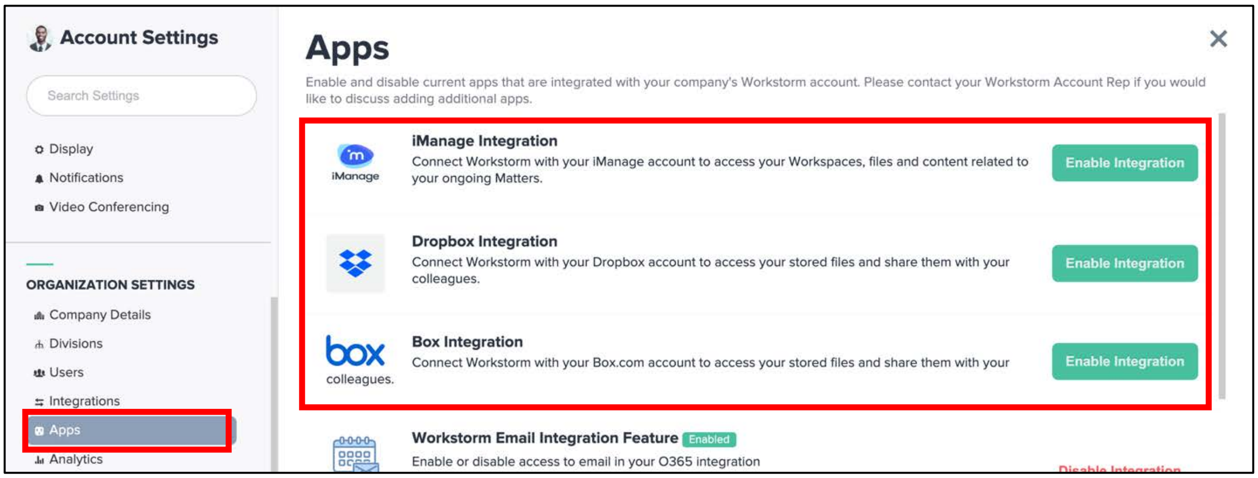
APPS

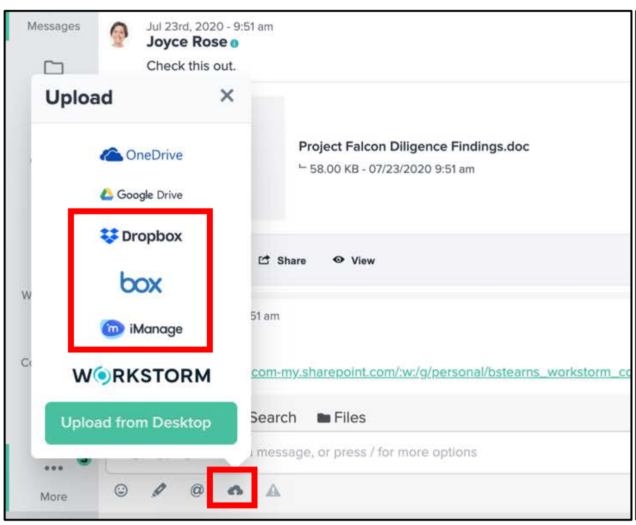
Enable or disable apps that are integrated with your company out-of-the-box.

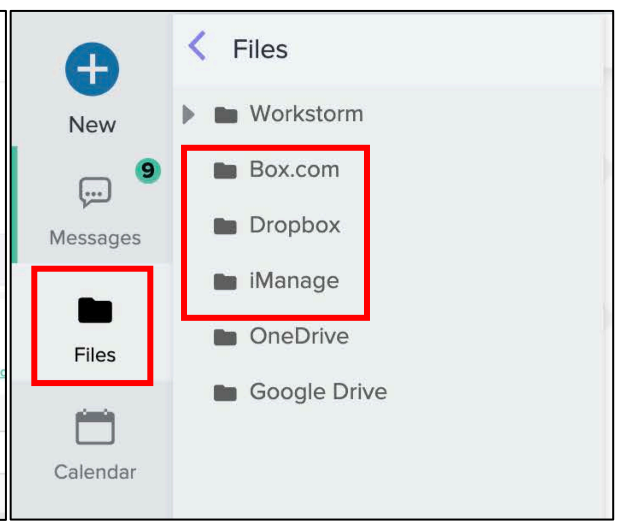
Document Management Systems (DMS)

To manage your apps, go to *Settings*, and under *Organization Settings*, click **Apps.**

By default, iManage, Dropbox, and Box functionality are disabled for the company. Click **Enable Integration** to individually enable each DMS for the company. Once enabled, members can login to their integrated DMS accounts and view or share their files directly in Workstorm.

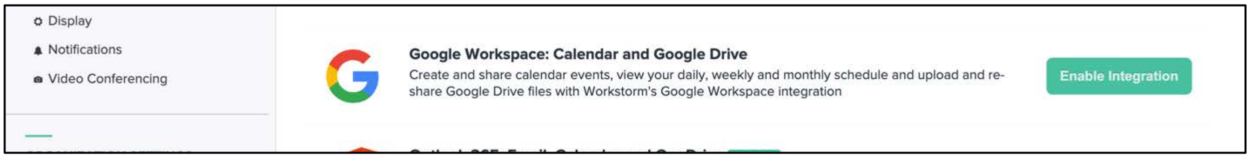


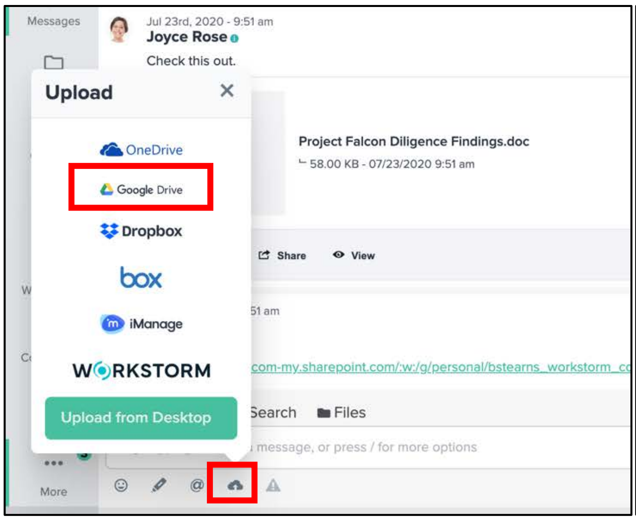


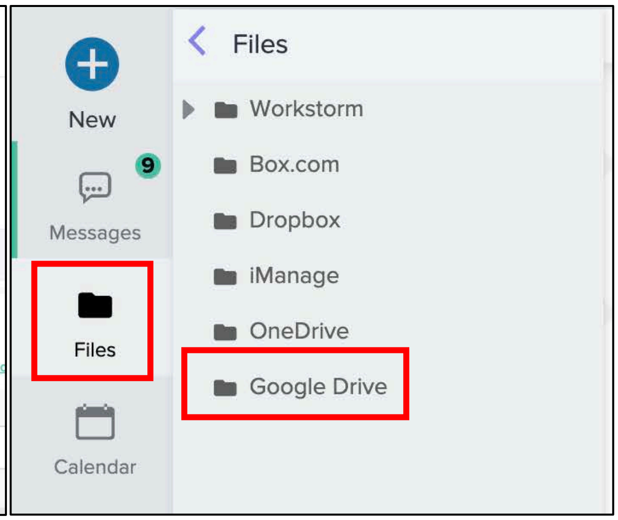


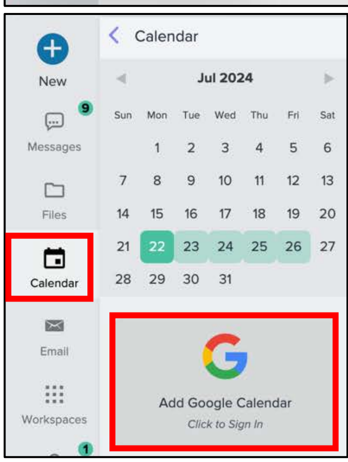
Google Workspace

By default, Google Workspace is disabled for the company. Click **Enable Integration** to unlock Google Calendar and Drive functionality.





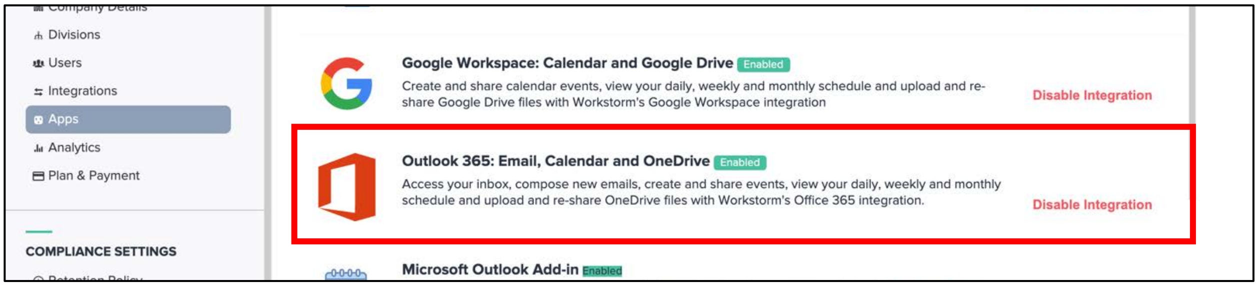


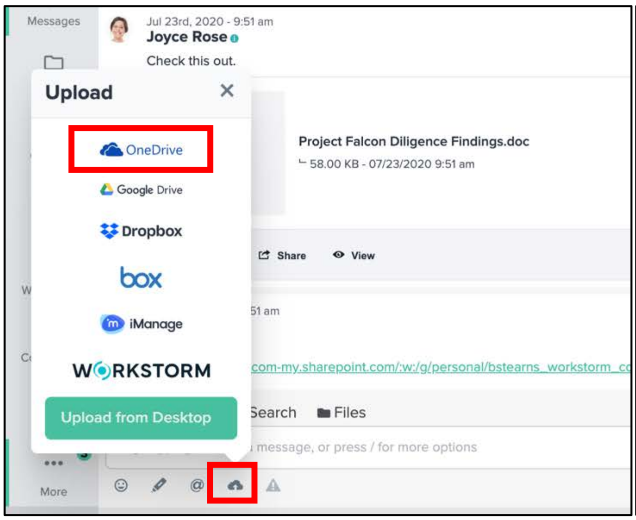


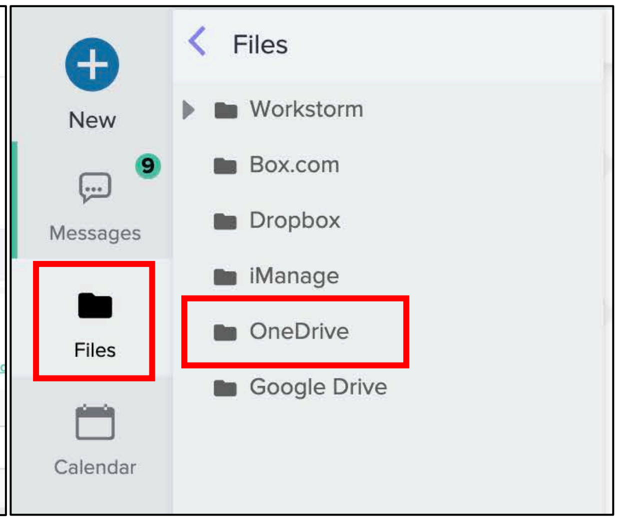
WORKSTORM

Office 365

By default, Outlook 365 is enabled for the company. Click **Disable Integration** to remove access to Email, Calendar and OneDrive functionality.

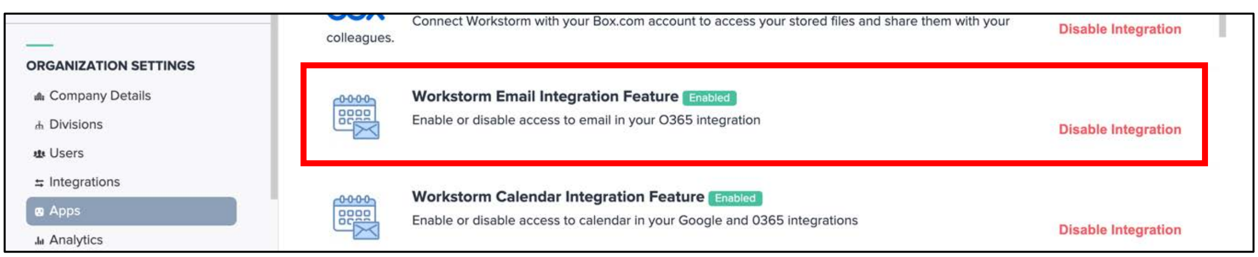






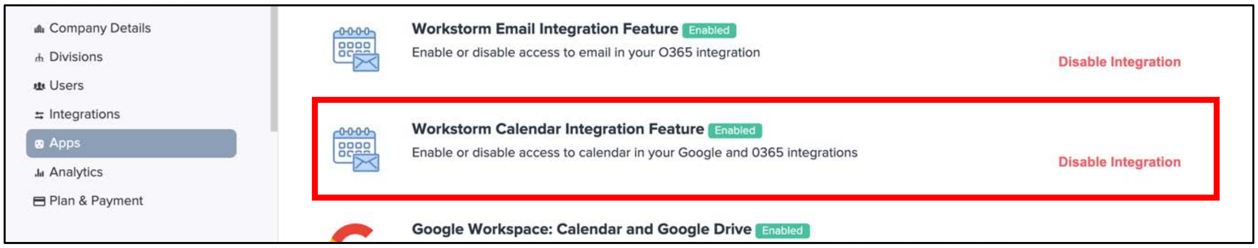
Customize Email

By default, *Email* is enabled as part of the Office 365 integration. Click **Disable Integration** to remove access to Office 365 email for the company.



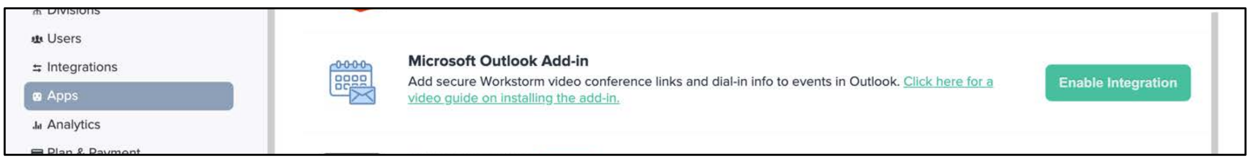
Customize Calendar

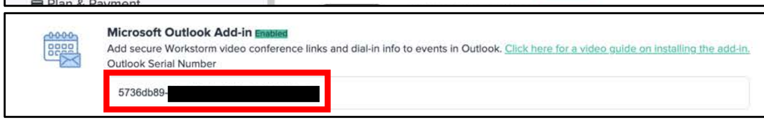
By default, *Calendar* is enabled as part of the Google and Office 365 integrations. Click **Disable Integration** to remove access to Google and Outlook Calendars for the company.



Outlook Add-in

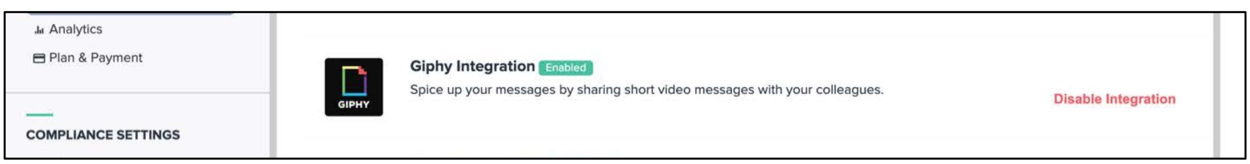
By default, the Outlook Add-in is disabled for the company. Click **Enable Integration** to allow the company to use the Outlook Add-in for Workstorm. The add-in allows members to attach Workstorm *Video Conferen*ce links to their events in the Outlook app. Company members will need the provided serial number when logging into the add-in in the Outlook app.





Giphys

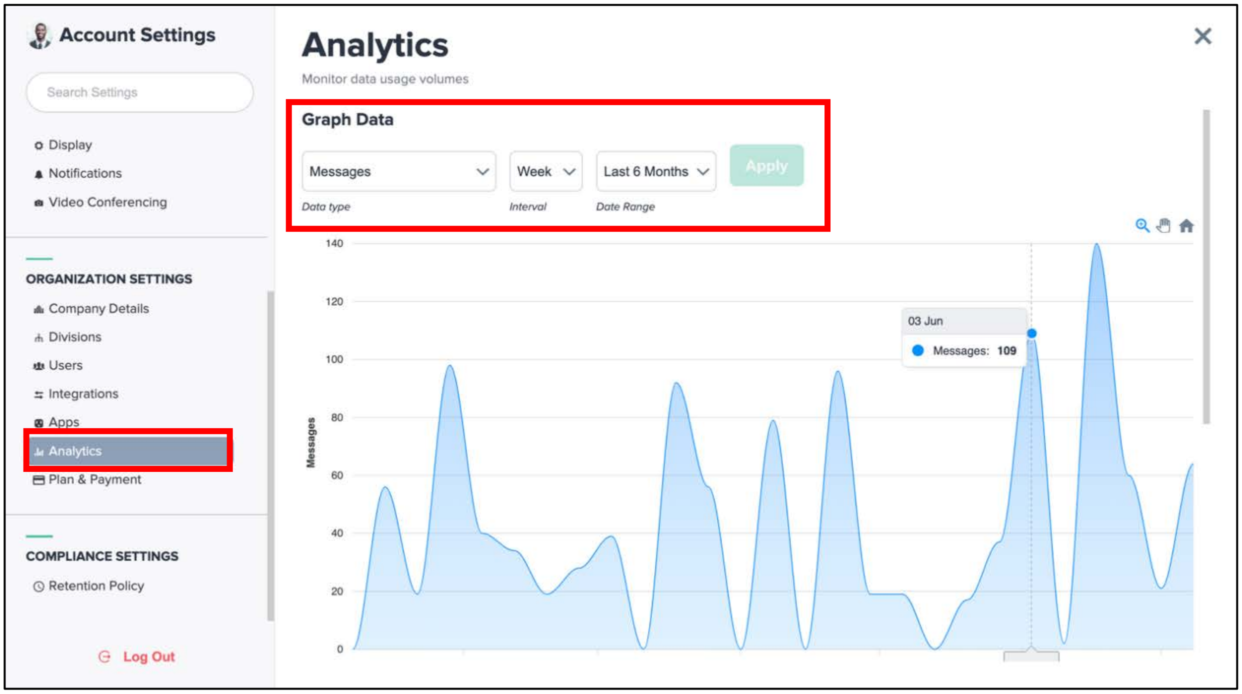
By default, Giphy is enabled for the company. Click **Disable Integration** to disable Giphys in messaging for the company.

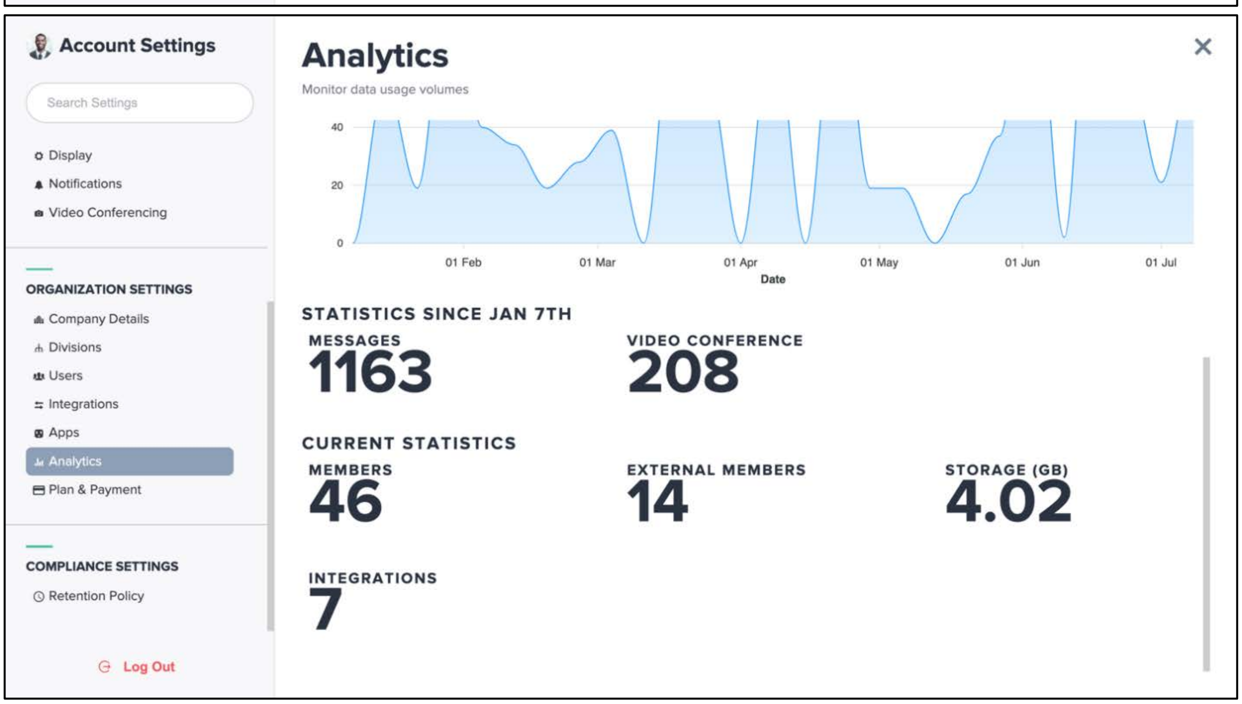


WORKSTORM

ANALYTICS

1. Go to *Settings*, and under *Organization Settings*, click **Analytics**
2. Choose a data type, such as *Messages*, *Video Conference minutes* or *Upload Size* (total amount of files uploaded in MB)
3. Choose your time interval in days, weeks or months
4. Choose a date range to view the customized dataset
5. Click the green **Apply** button to view the company's collaboration statistics



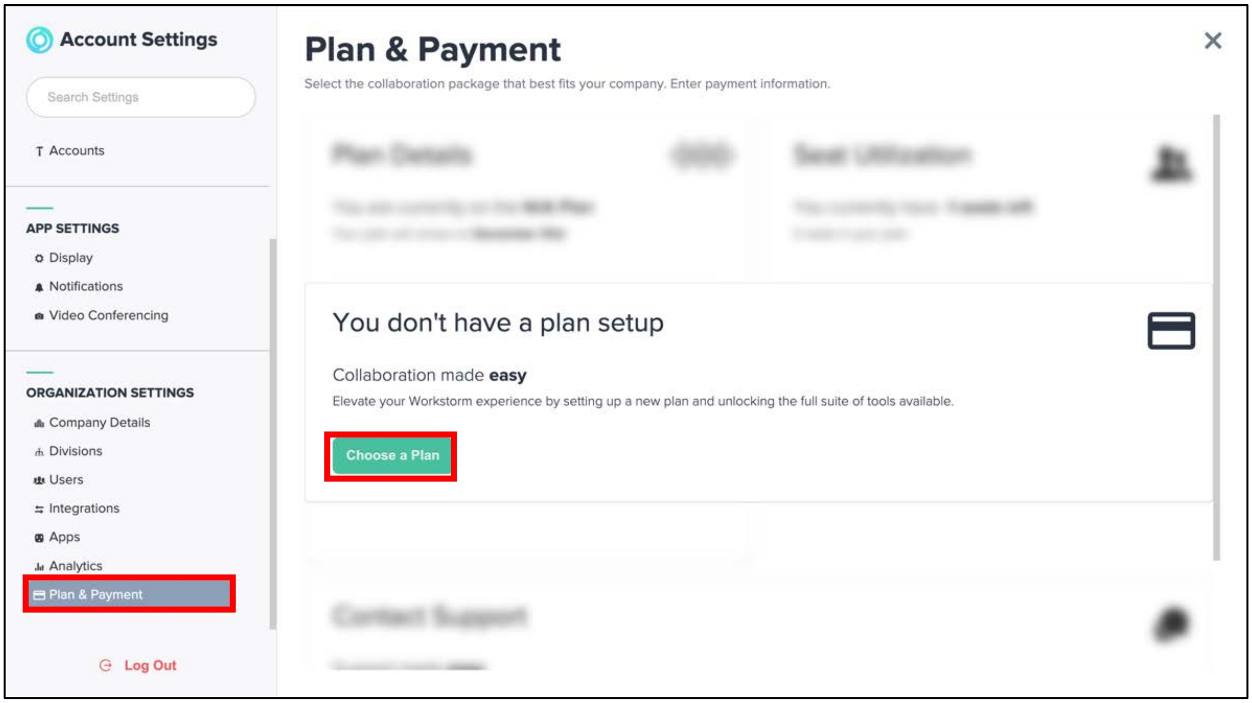


PLAN & PAYMENT

Set up the company's pricing plan, as well as manage plan details and payment information.

Setting up Pricing Plan

Go to *Settings*, and under *Organization Settings*, click **Plan & Payment**. Then, click the green **Choose a Plan** button.



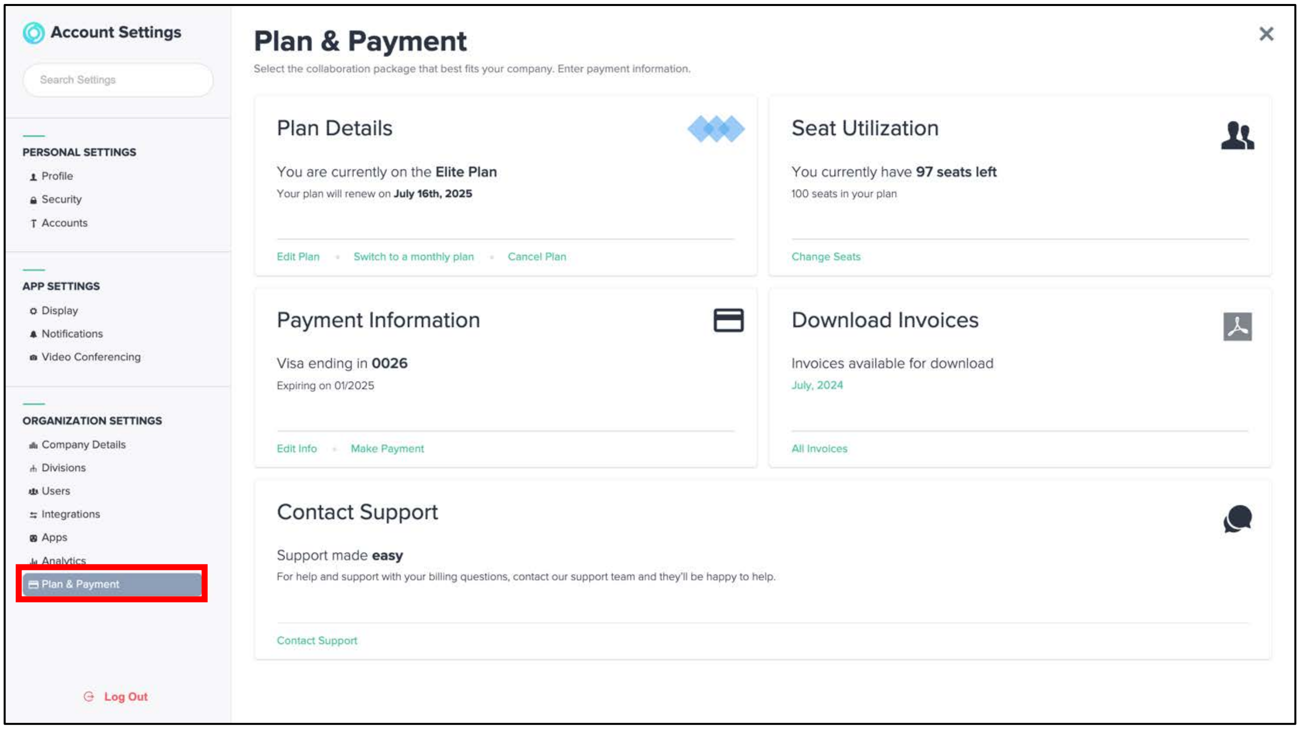
To set up a plan:

1. Choose a license type and whether it's a monthly or annual pricing plan
2. Enter the number of seats needed for the company's pricing plan
3. Add a payment method
4. Review the pricing plan details
5. Click the green **Complete Purchase** button to finalize the payment

WORKSTORM

Managing Pricing Plan

Once the pricing plan is finalized, Company Admins can edit the pricing plan, update the number of seats in the license, make a payment, change their payment method, and download invoices. There is an option to contact support on the bottom of the dashboard, if needed.

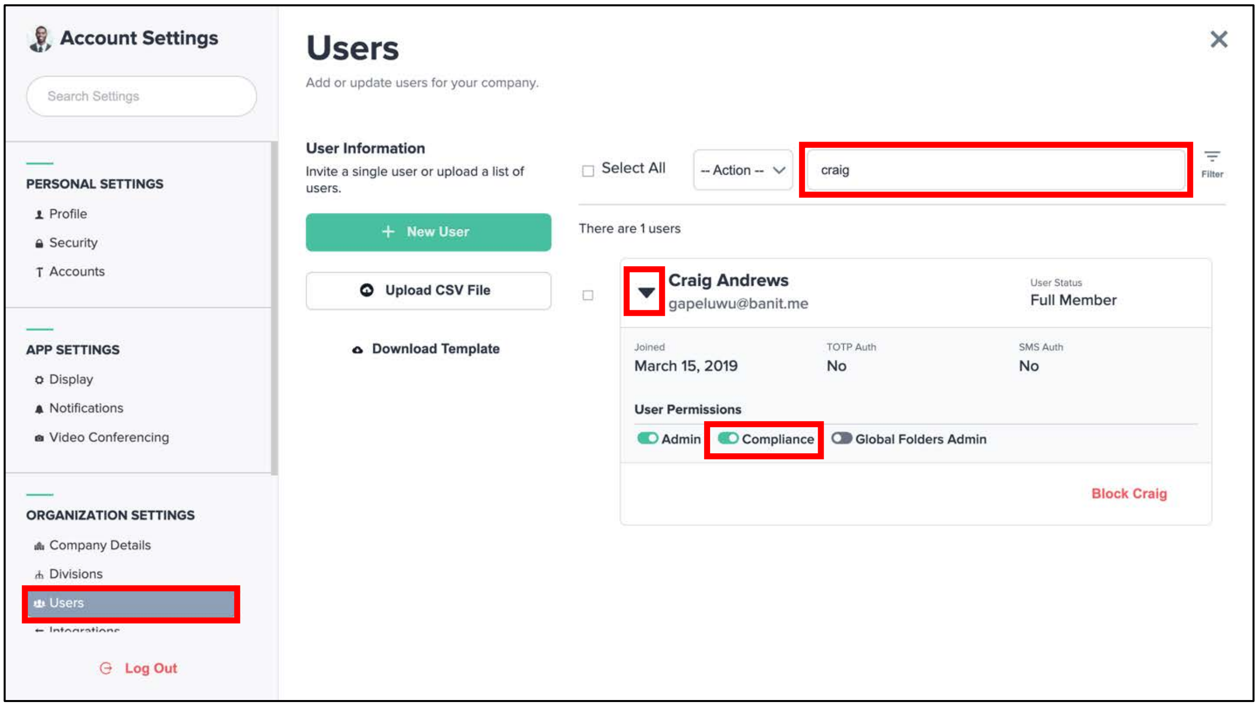


COMPLIANCE

The compliance module allows assigned compliance moderators the ability to audit and export members' messaging data from across the platform. Contact your account representative to enable the compliance module.

Assigning Compliance Moderators

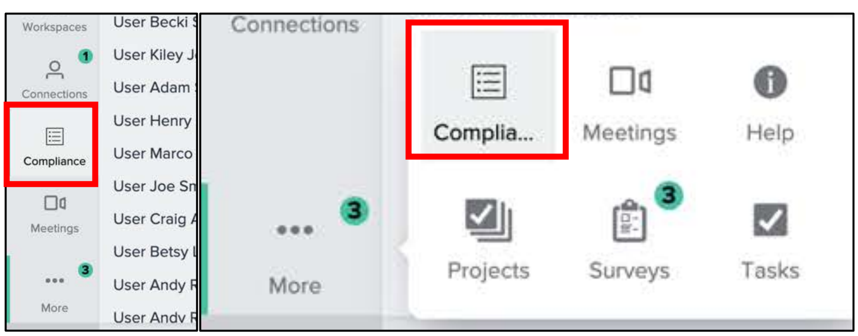
Go to *Settings*, and under *Organization Settings*, click **Users.** Search for a company member, then click the dropdown arrow to the left of their name. Toggle on **Compliance** to grant compliance moderator privileges to the chosen member.



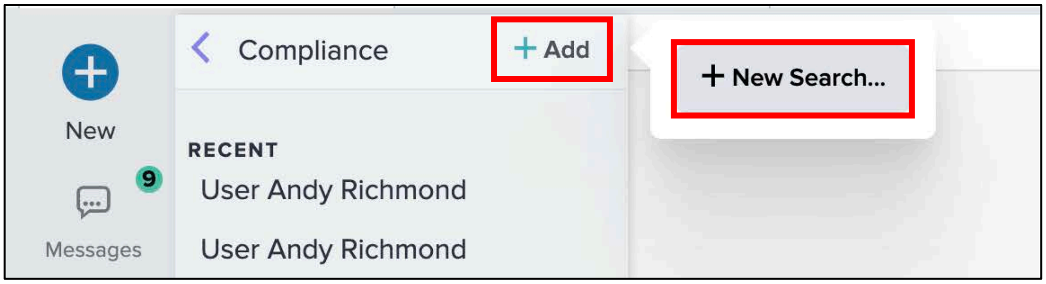
Completing an Audit

Only compliance moderators can complete an audit.

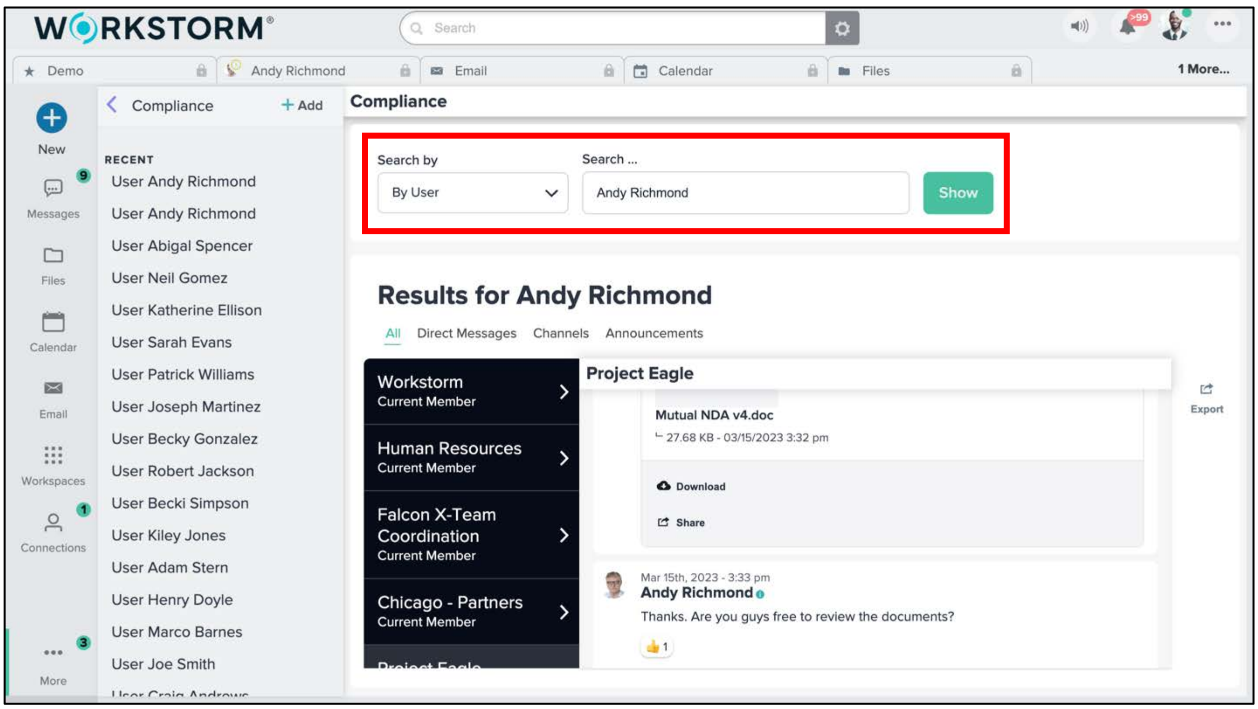
1. Click the **Compliance** icon from the left sidebar or **More** menu



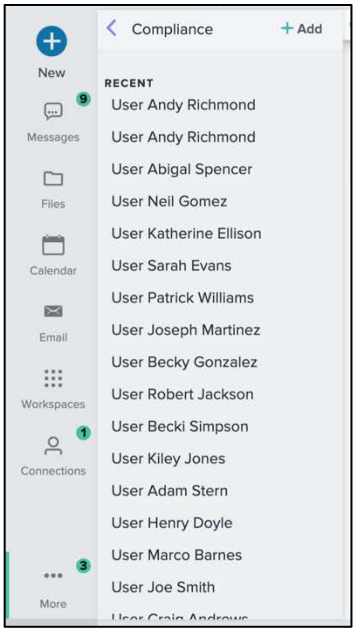
2. Click the **+Add** button at the top right of the *Compliance* menu and select **+New Search**



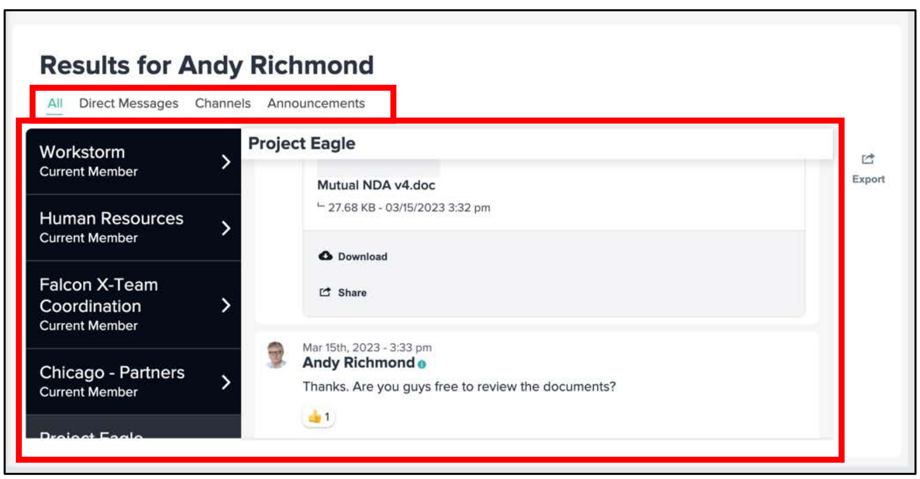
3. Search for a company member in the search input and select them
4. Click the green **Show** button to view their messaging and file sharing data



5. A history of recent compliance searches will appear in the Compliance menu.

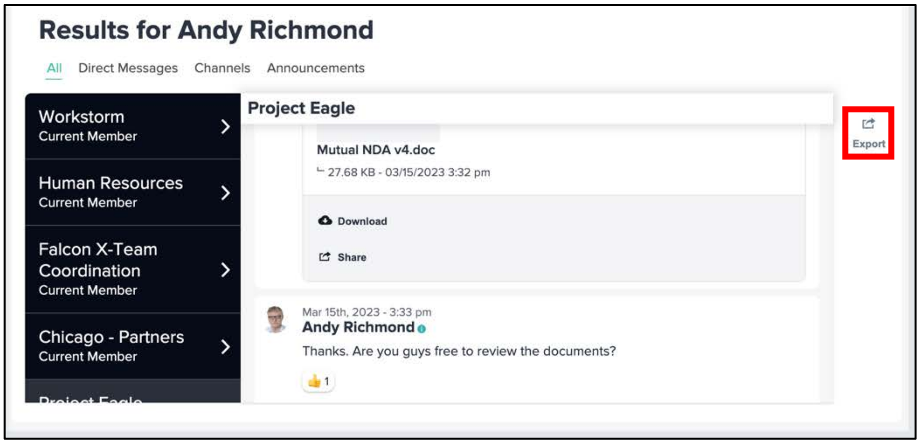


By default, the audit results for a member will show *All* conversations. Filter the results by conversation type, including *Direct Messages*, *Channels* or *Announcements*. Then, select a conversation to view its data, including any deleted messages.

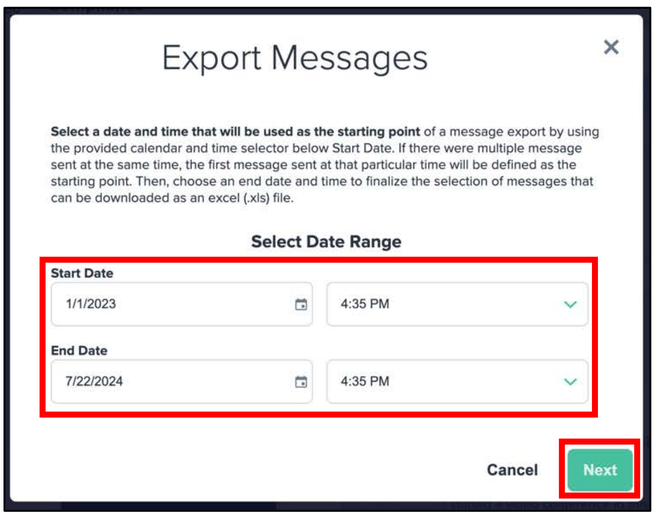


To download the data in an excel (.xls) file format:

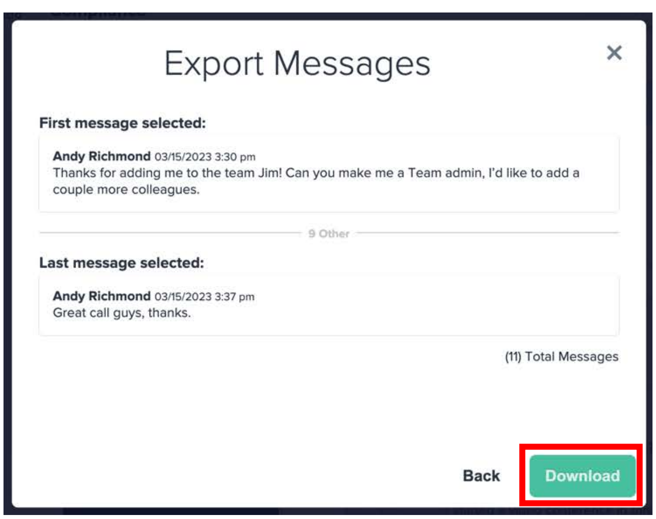
1. Click the **Export** button on the right-side of the compliance module



2. Choose the desired date range and click the green **Next** button



3. Then, click the green **Download** button to download



WORKSTORM

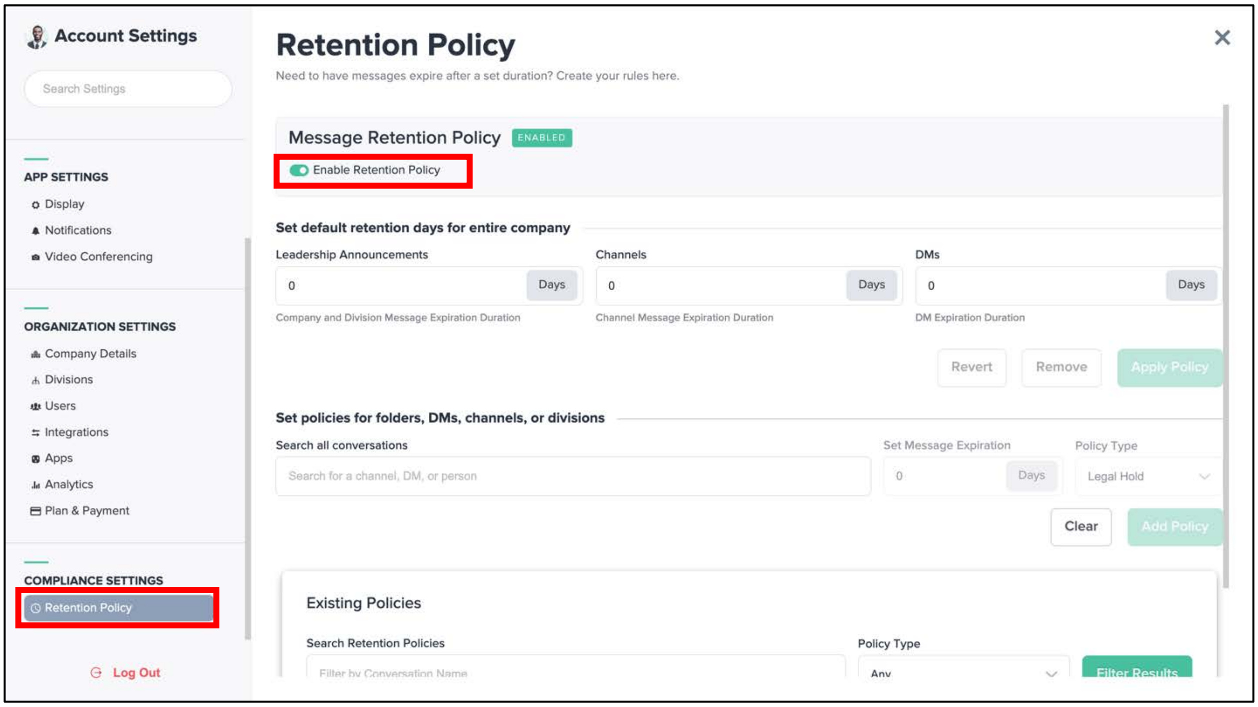
RETENTION POLICY

The retention policy dashboard allows compliance moderators to set company policies for message expiration and legal holds.

Enabling Retention Policy

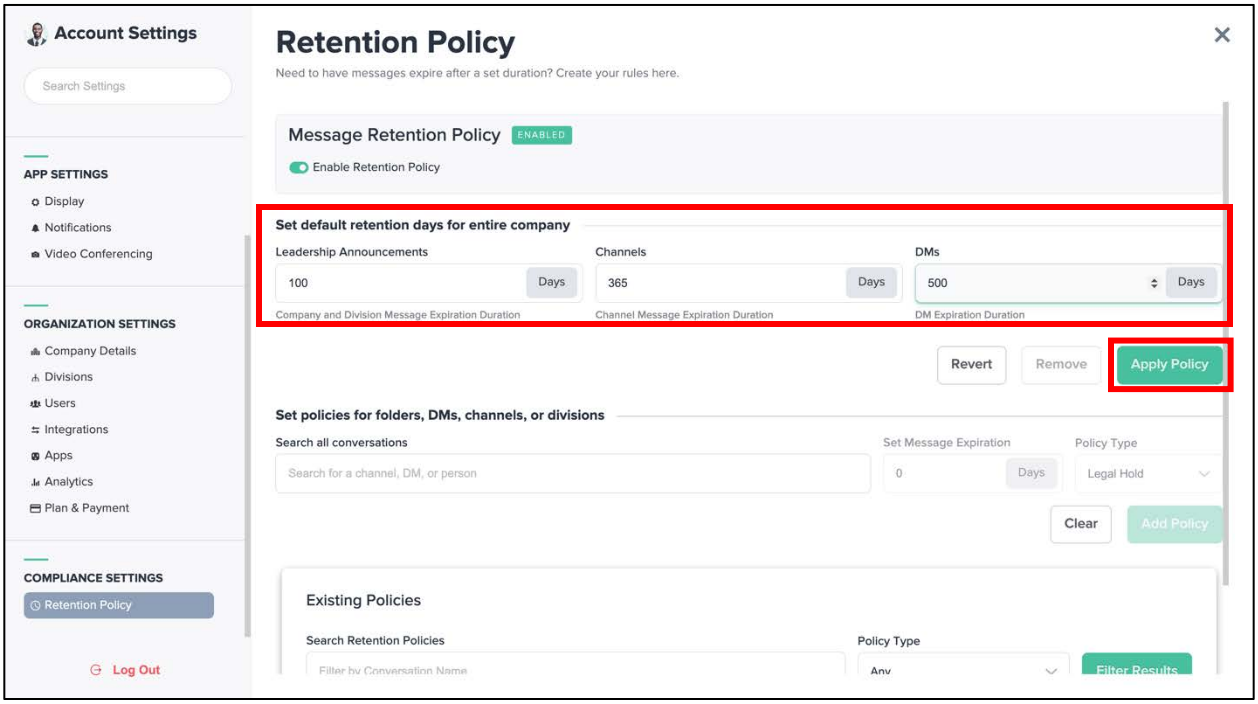
Only compliance moderators can access the retention policy feature.

Go to *Settings*, and under *Compliance Settings*, click **Retention Policy.** Click the **Enable Retention Policy** toggle to activate the dashboard.

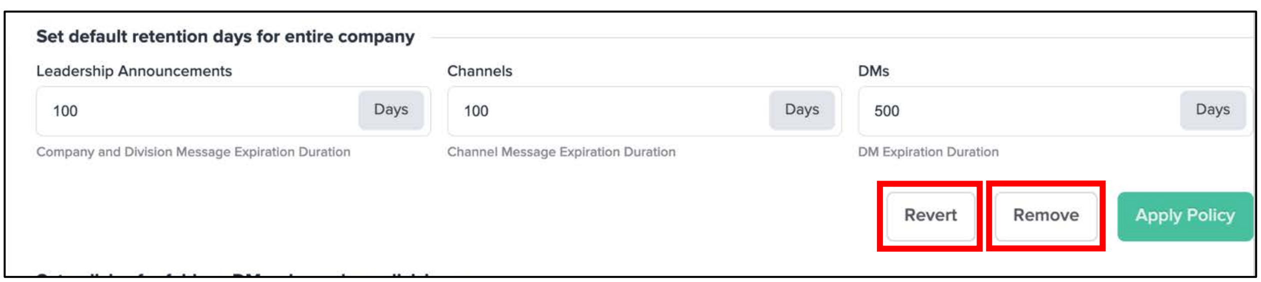


Company-wide Retention Policy

Once the dashboard is enabled, set the number of days until messages expire in all *Announcements*, *Channels* and/or *Direct Messages* across the entire company. Use the inputs to enter expiration durations for each conversation type. Click the green **Apply Policy** button when finished. Compliance moderators can make changes to the policies when necessary.



When editing the duration of an expiration policy, use the **Revert** button to return to the last set of saved changes. Use the **Remove** button to disable the retention policies and reset each duration to zero.

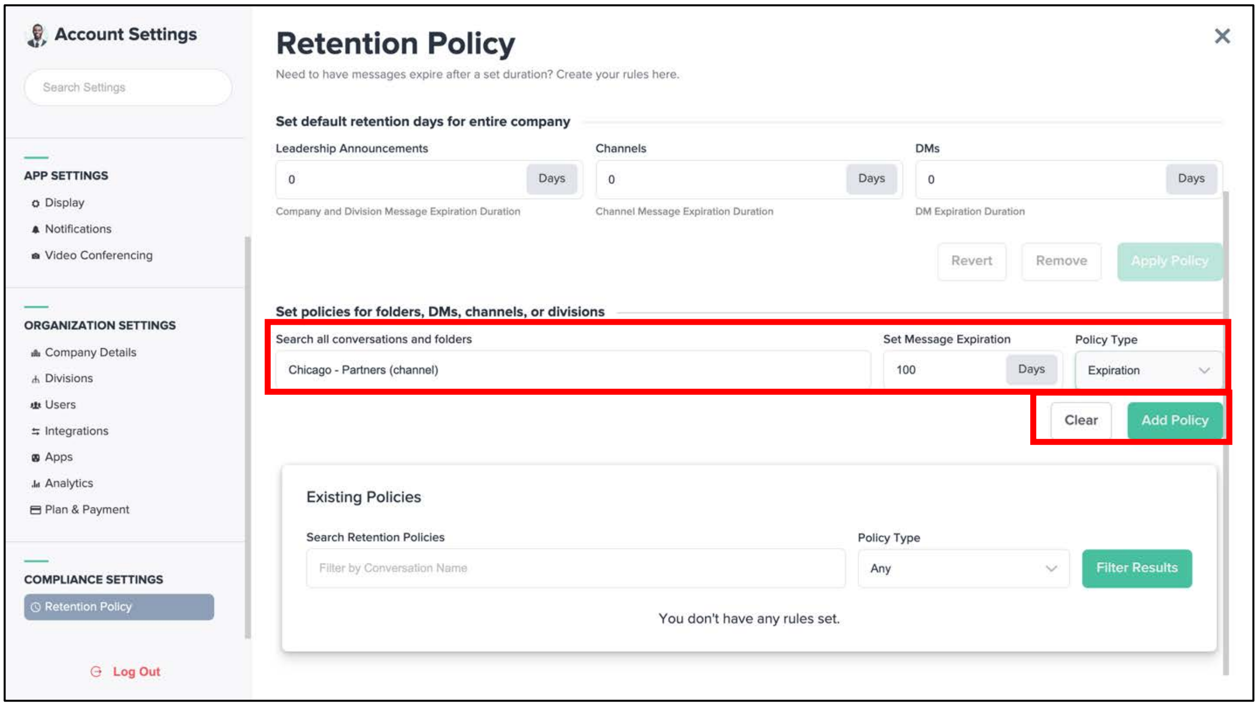


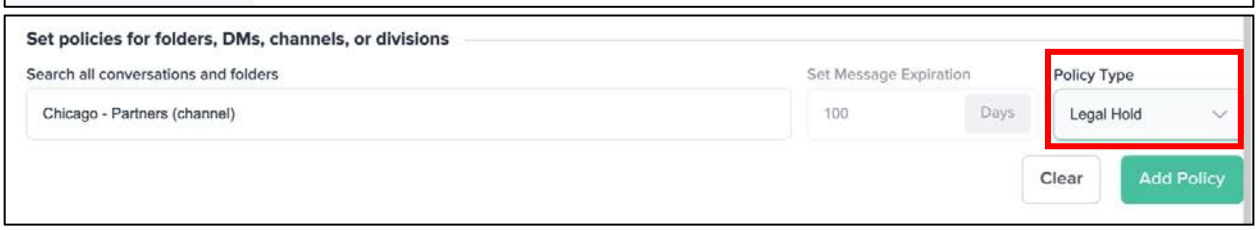
WORKSTORM

Setting Individual Policies

Use the *Search All Conversations* input to search for a conversation or *Managed Folder*. Then, choose a duration and policy type (*Expiration* or *Legal Hold*) and click the green **Add Policy** button. Use the **Clear** button to reset your inputs.

NOTE: Legal holds are used to protect a specific conversation from a company-wide expiration policy.



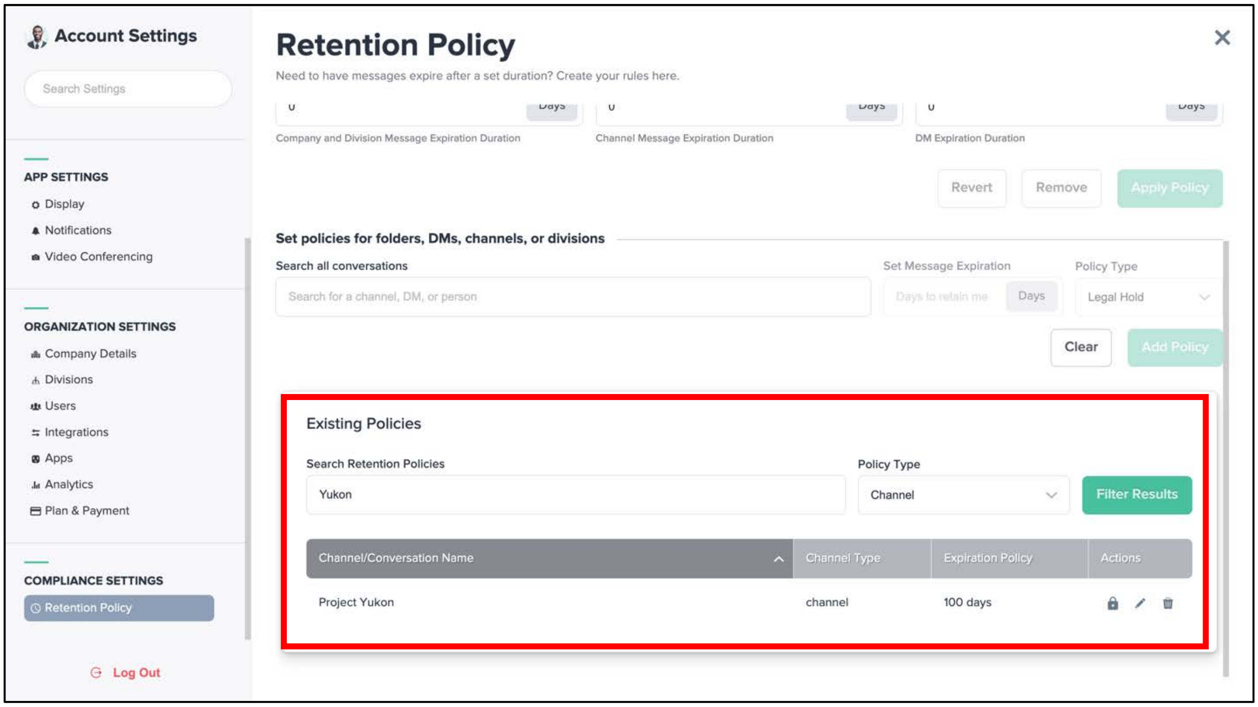


WORKSTORM

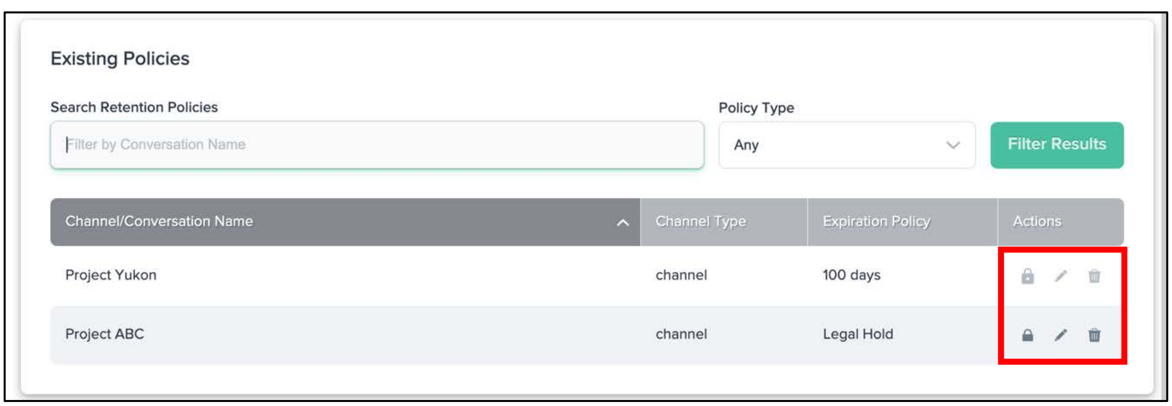
Managing Existing Policies

Manage and search for existing custom retention policies.

- Click the **Lock** icon to place or remove a legal hold on existing policies
- Click the **Pencil** icon to edit existing policies
- Click the **Trash** icon to remove existing policies



NOTE: The size of the lock button changes depending on the action that is available. If you are placing a legal hold, then the button will be larger (see Project Yukon below). If you are removing an active legal hold, then the button will be smaller (see Project ABC below).



WORKSTORM

MANAGED FOLDERS

Managed Folders allow an organization to centrally deploy channels and folders for projects and tasks with customized compliance policies.

There are two main roles:

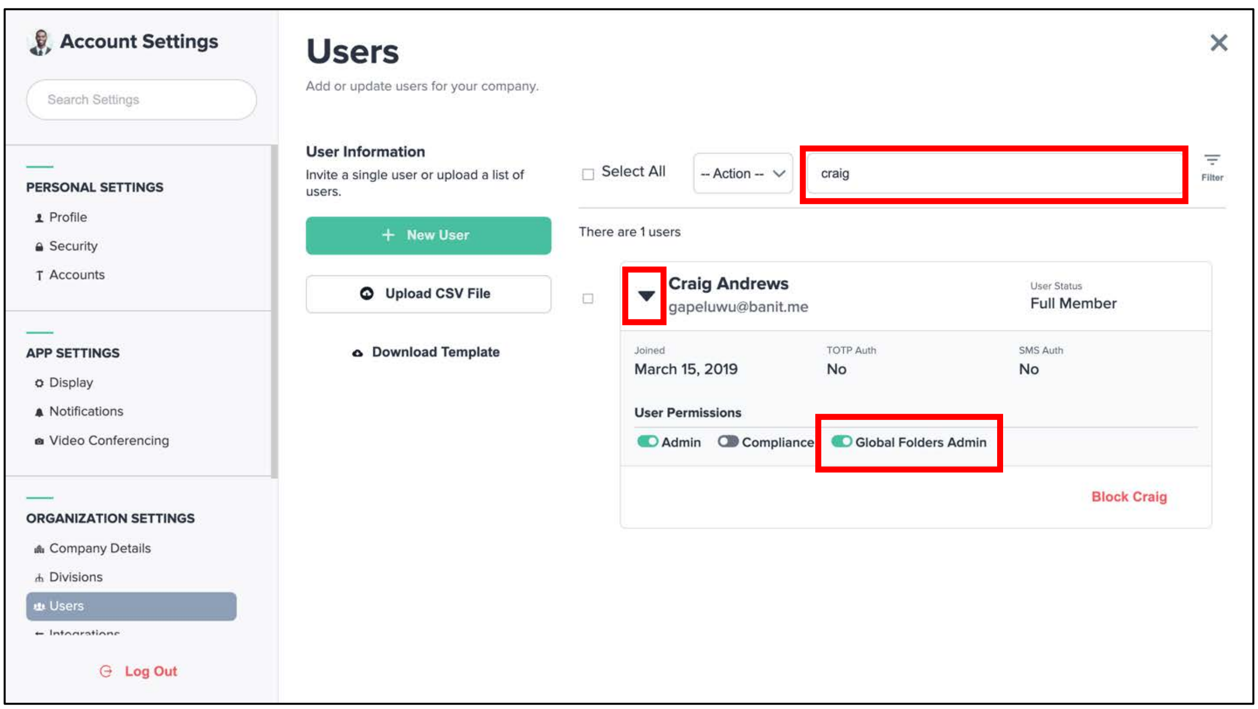
- **Global Folder Administrators (GFAs)**: These governance administrators specify the projects to be managed, apply compliance and retention polices, and segregate information. GFAs can create folders and channels, but there is a privacy layer and the GFA cannot see the contents of the channels. GFAs can designate Managed Folder Administrators, which includes assigning themselves.
- **Managed Folder Administrators (MFAs)**: These are channel administrators who define communication channels within the projects and control who has access to pertinent information and files. MFAs have access to the content of the channels they create but cannot create new Managed Folders.

To enable the *Managed Folders* feature, please contact your account representative.

Appointing Global Folder Admins

To grant GFA privileges to a member of your company:

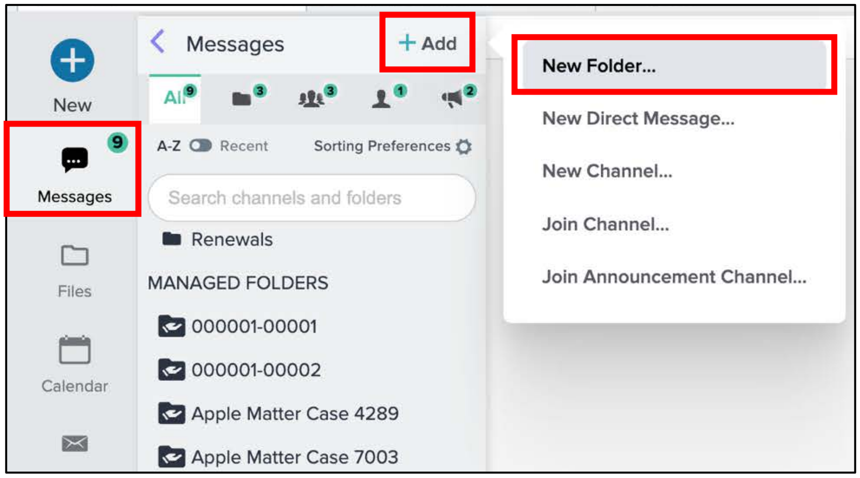
1. Go to *Settings*, and under *Organization Settings*, click **Users**
2. Search for a company member and click the dropdown arrow to the left of their name
3. Toggle on **Global Folders Admin**



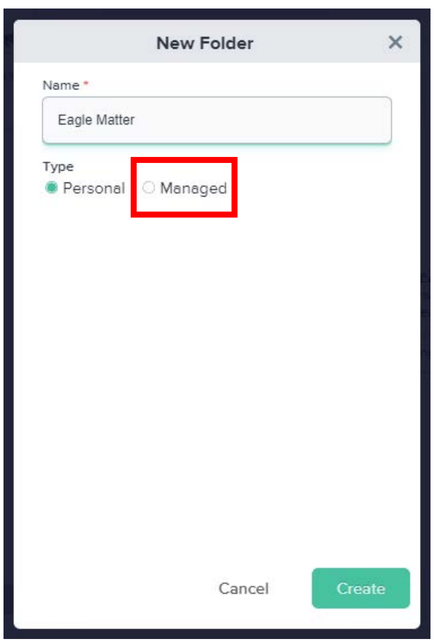
Creating a Managed Folder and Assigning Managed Folder Admins

Only GFAs can create *Managed Folders*:

1. Select the **Messages** icon from the left sidebar
2. Click the **+Add** button in the top right of the *Messages* menu, and select **New Folder**

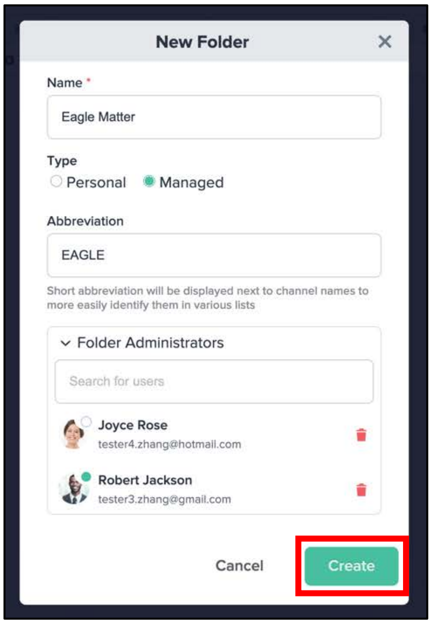


3. In the New Folder pop-up, enter a name that describes the contents of the folder
4. Under Type, choose **Managed** to show additional boxes



5. Provide an abbreviation to be displayed alongside Channel names within the folder
6. Assign MFAs by searching for and clicking on users in the box under Folder Administrators
7. Click **Create**

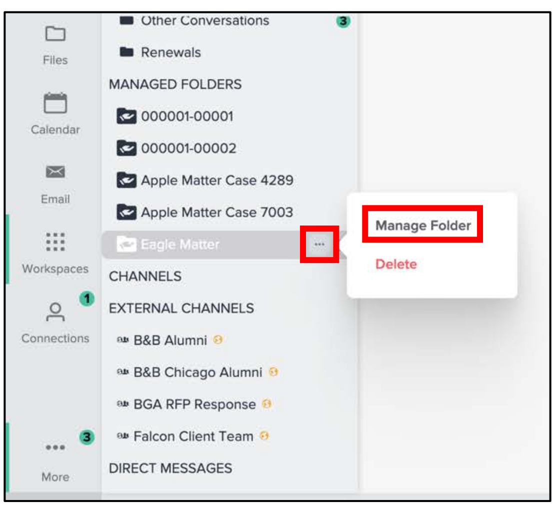
NOTE: If GFAs want to create and manage channels inside the folder, GFAs can add themselves as MFAs.



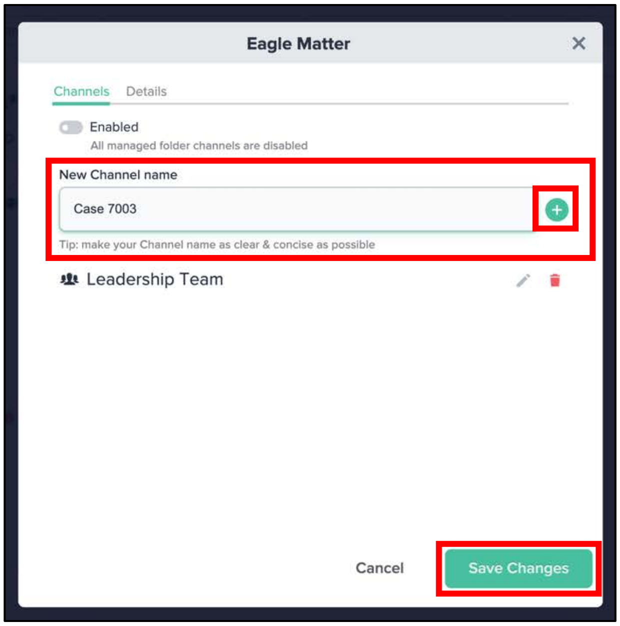
Adding Channels to a Managed Folder

Once appointed to a Managed Folder, MFAs can create and organize Channels within that Folder:

1. Hover over the relevant Managed Folder, click on the **ellipsis •••** button, and select **Manage Folder**



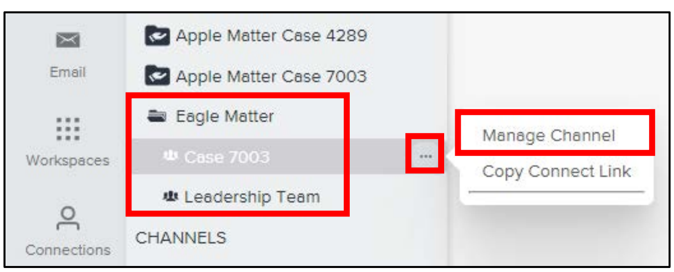
2. In the pop-up, enter a name for the Channel and then click the green **plus +** button
3. Repeat to add another Channel, if necessary
4. Click **Save Changes**



To manage your Channels:

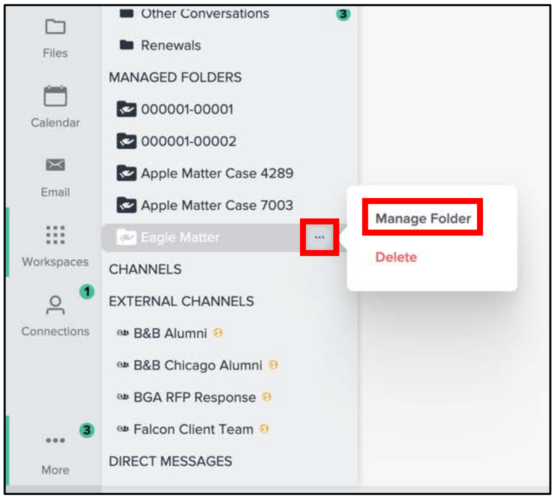
1. Click on the relevant Managed Folder to display its contents
2. Hover over the Channel you would like to manage
3. Click on the **ellipsis •••** button and select **Manage Channel**

For more information on how to add members to your Channels, customize notifications preferences, and adjust privacy settings, click here.

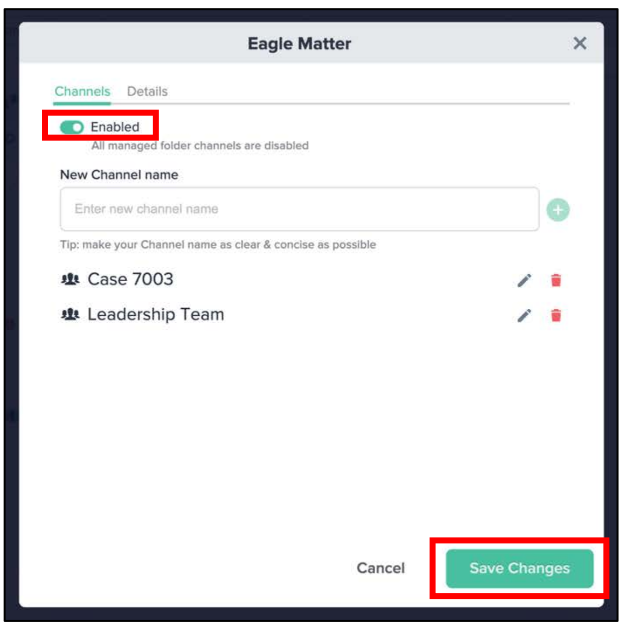


Initially, *Managed Folders* are disabled, meaning that any created Channels will be inactive until the Folder is enabled by the MFA. When ready to enable the Folder:

1. Hover over the relevant Managed Folder, click on the **ellipsis •••** button, and select **Manage Folder**



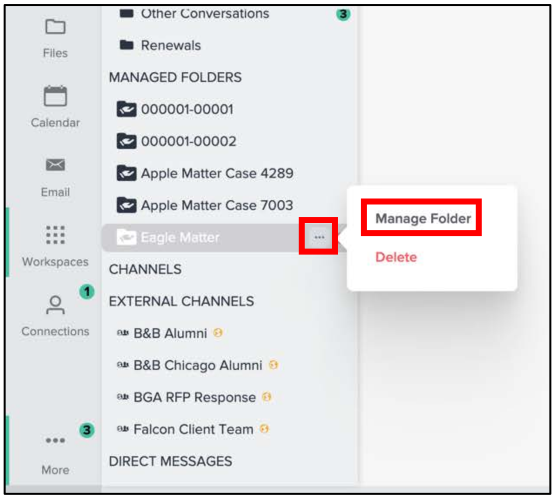
2. Click the **Enabled** toggle at the top left of the pop-up screen to activate Channels and allow members of those Channels to begin collaborating
3. Click **Save Changes**



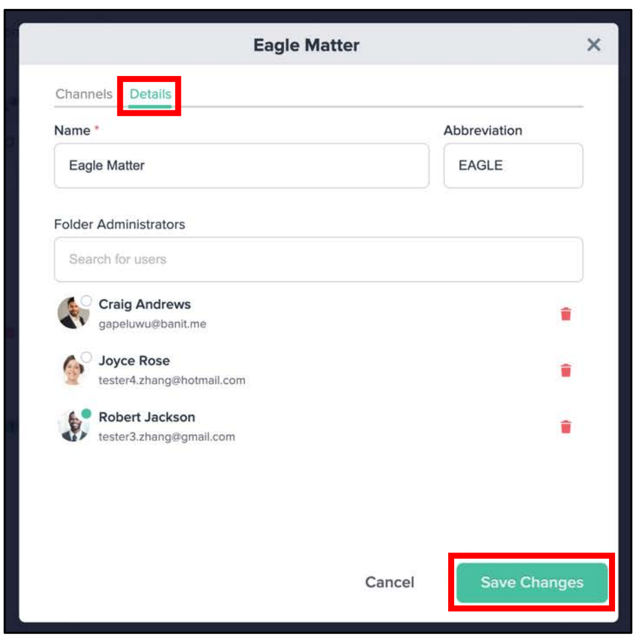
Updating Existing Managed Folders

GFAs and MFAs can update a Managed Folder.

1. Hover over the relevant Managed Folder, click on the **ellipsis •••** button, and select **Manage Folder**



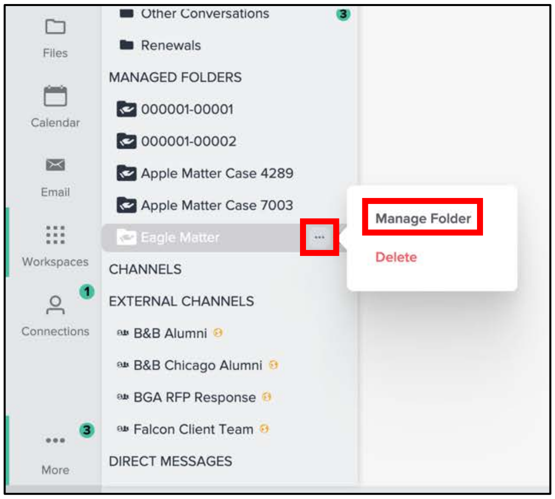
2. Click on the **Details** tab to edit the folder's name and/or abbreviation and choose to add or remove MFAs
3. Click the green **Save Changes** button when finished



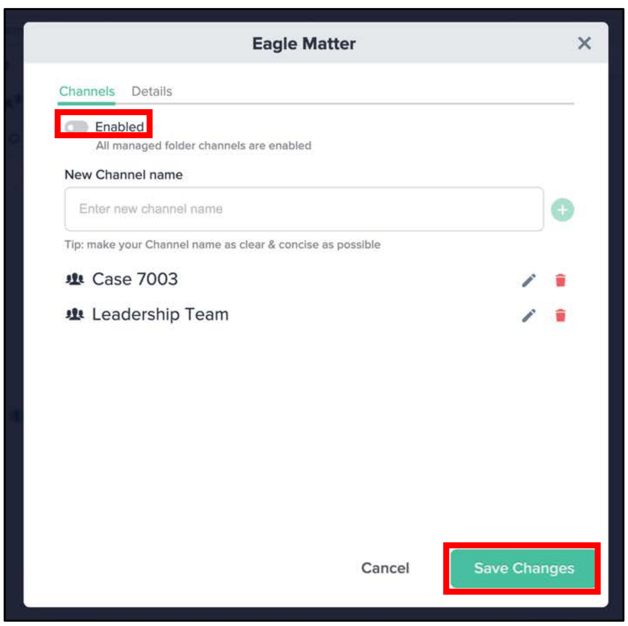
Disabling & Deleting Existing Managed Folders

If the Managed Folder and its Channels need to be deleted, an MFA must first disable the folder.

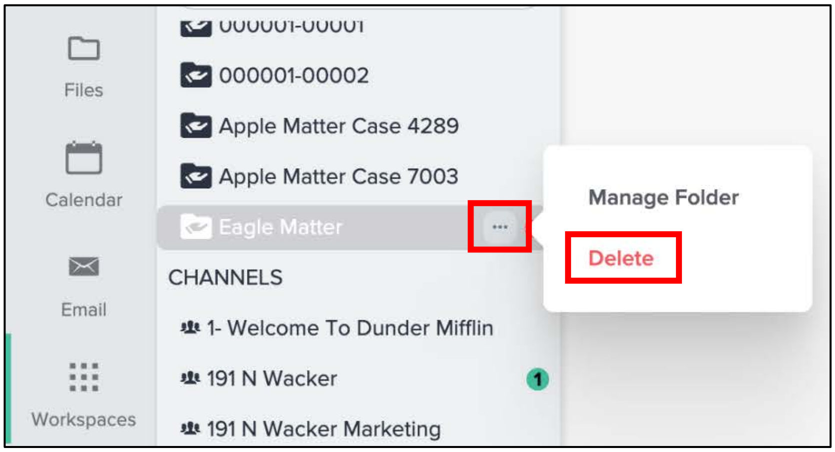
1. Hover over the relevant Managed Folder, click on the **ellipsis •••** button, and select **Manage Folder**



2. Toggle off **Enabled** at the top-left of the pop-up screen
3. Click the green **Save Changes** button



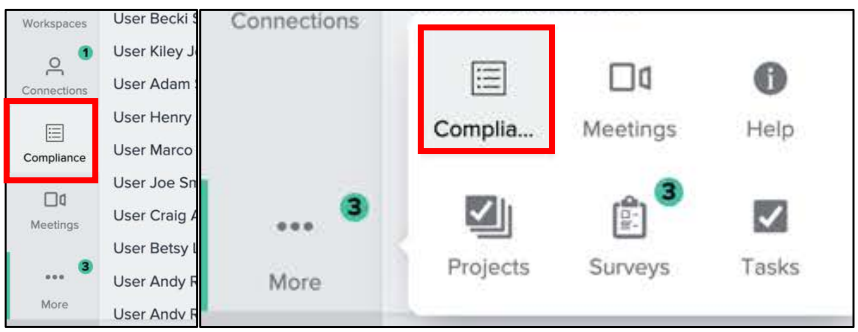
Once a Managed Folder is disabled, a GFA or MFA can delete it. Hover over the desired Managed Folder, click on the **ellipsis •••** button, and select **Delete**.



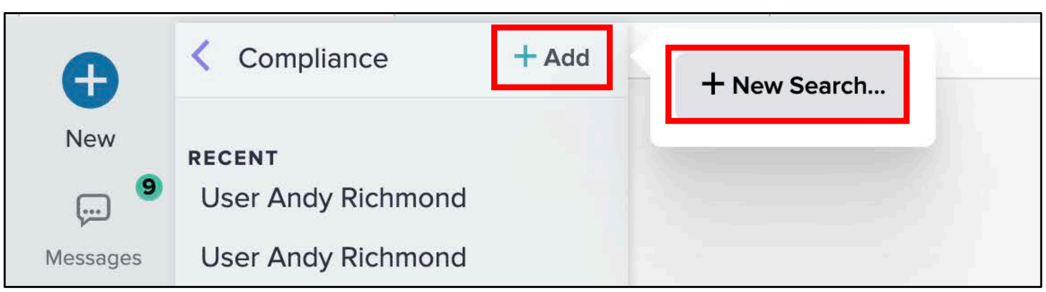
Compliance for Managed Folders

If the *Compliance Module* is enabled for the company, all the messaging and file sharing data stored in a Managed Folder's Channels can be audited.

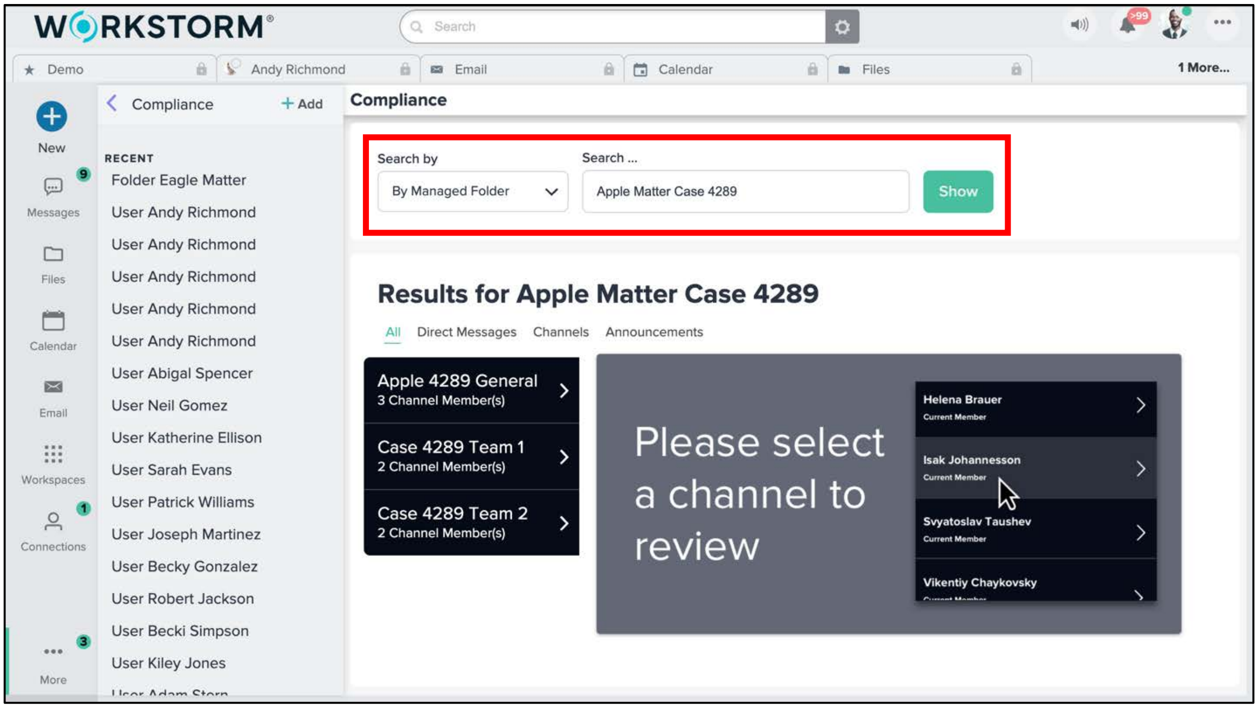
1. Click the **Compliance** icon from your left sidebar or **More** menu



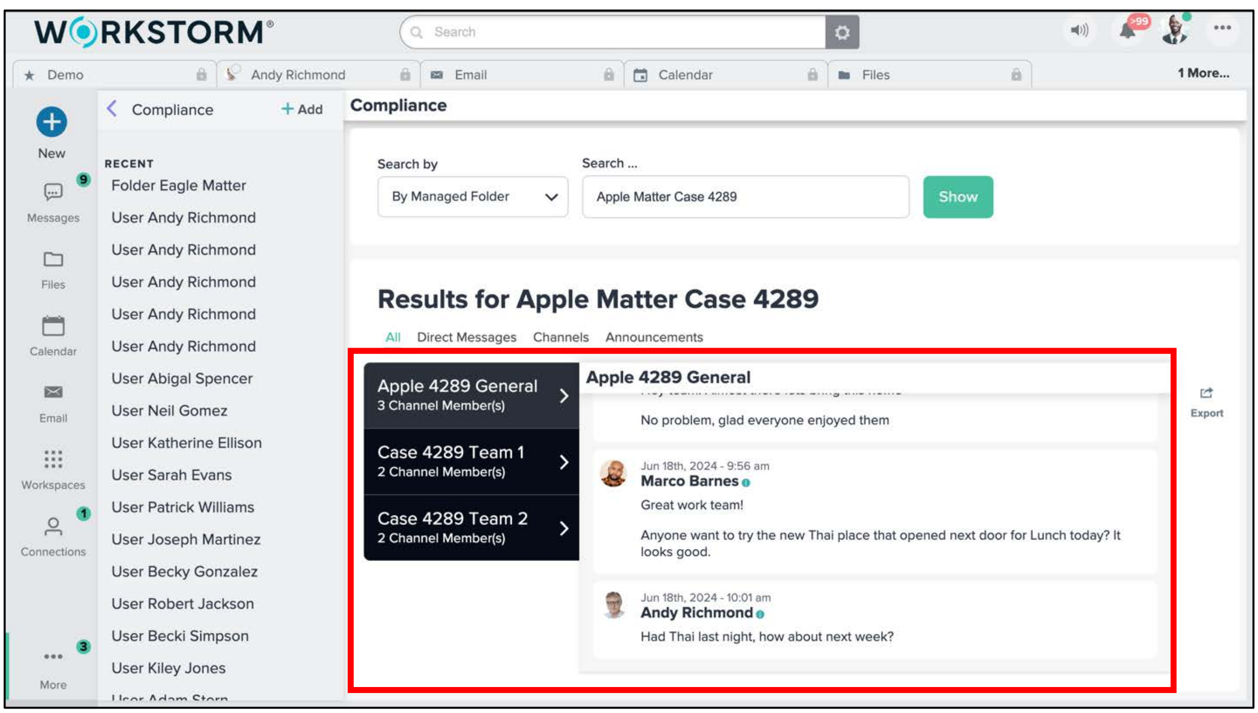
2. Click the **+Add** button at the top right of the *Compliance* menu and select **+New Search**



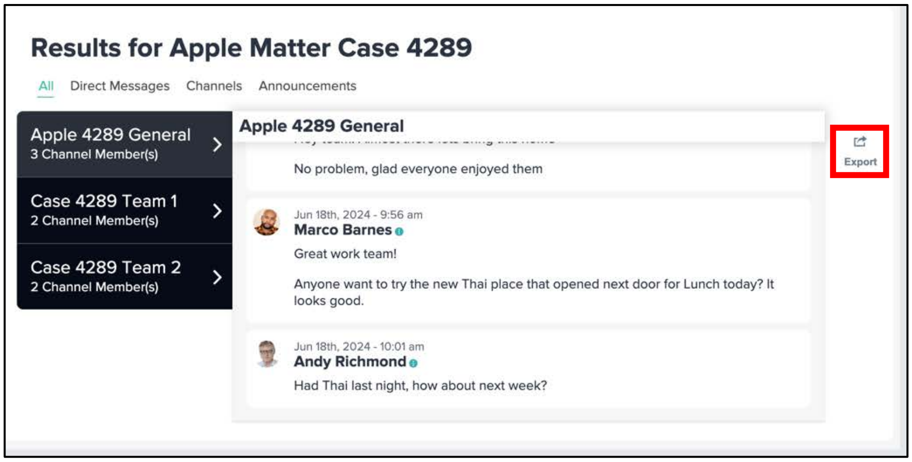
3. Click the dropdown under *Search by* and select **By Managed Folder**
4. Search for a Managed Folder in the search input and select the appropriate result
5. Click the green **Show** button to view all Channels within the Managed Folder



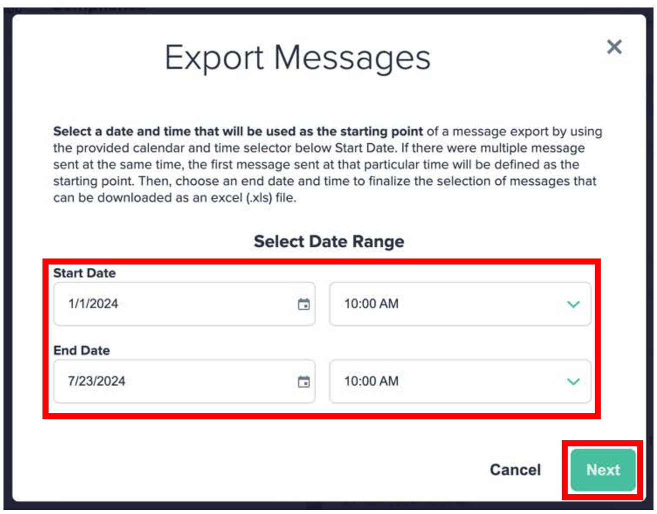
6. Select a Channel to view its data, including any deleted messages



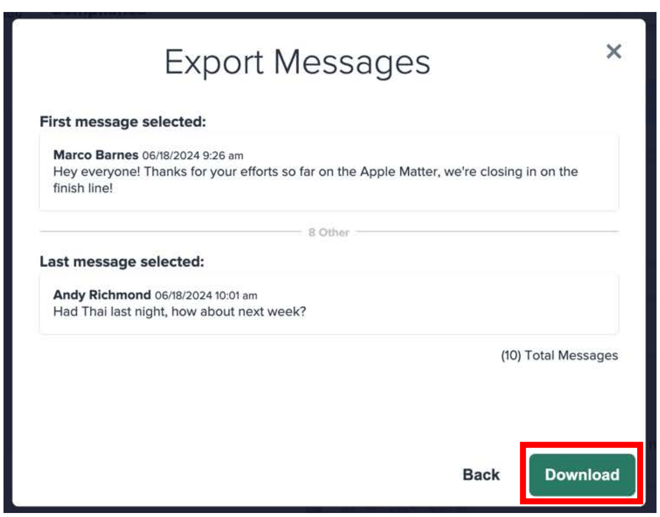
7. To download the data in an excel (.xls) file format, click **Export** on the right-side of the Compliance module



8. Choose the desired date range and click **Next**



9. Click **Download**



WORKSTORM

MEMBER GUIDE

Be sure to download the End User Guide for details on using all the various features and functionality available to members in Workstorm. The guide includes instructions for:

- Account Setup
- Direct and Channel Messaging
- Calendar and Email
- Video Conferencing
- Workspaces
- File Management and DMS Integrations
- Search
- Desktop and Mobile Apps
- And more...

QUESTIONS?

A Workstorm customer support representative is here to help. Simply click **here** to create a support ticket or to provide product feedback.