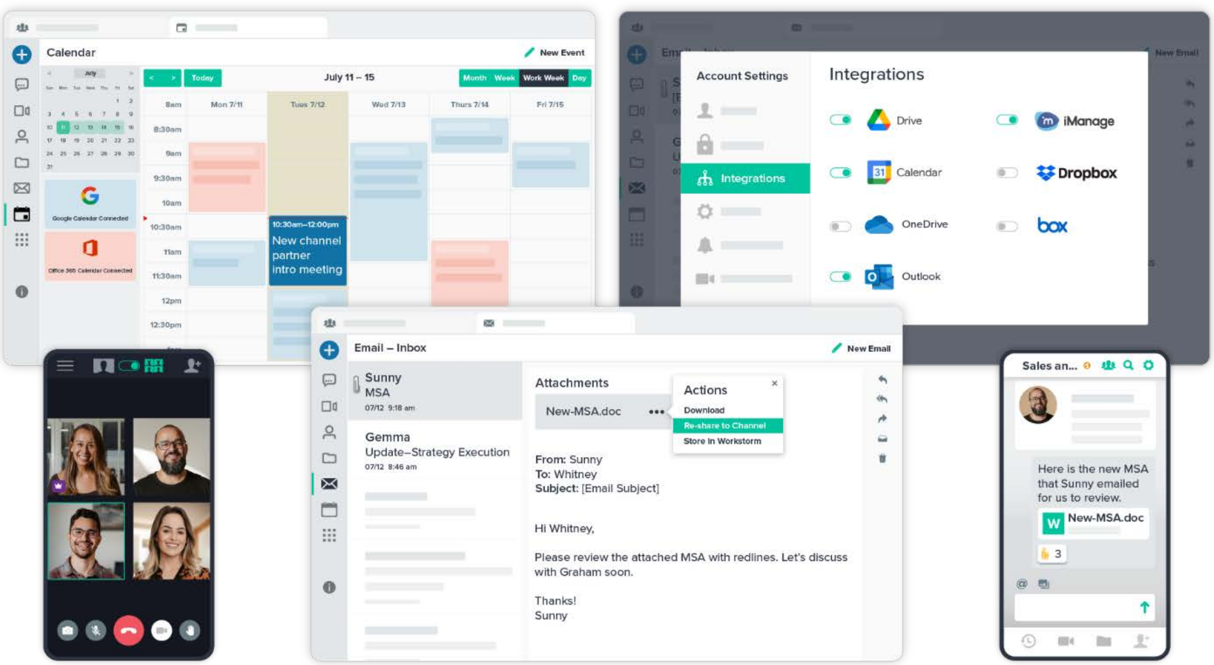
WORKSTORM

Admin Guide



Version 2-21-25

WORKSTORM

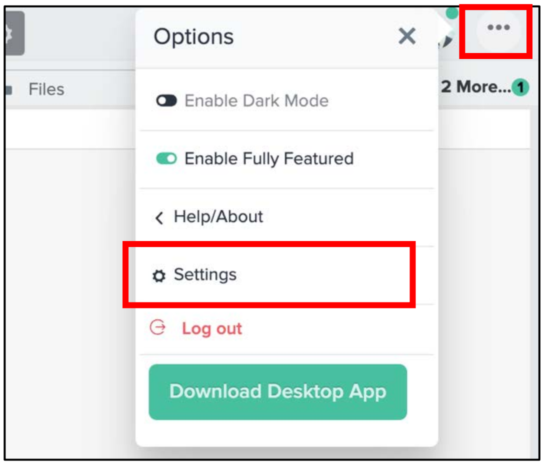
Admin Guide

COMPANY DETAILS

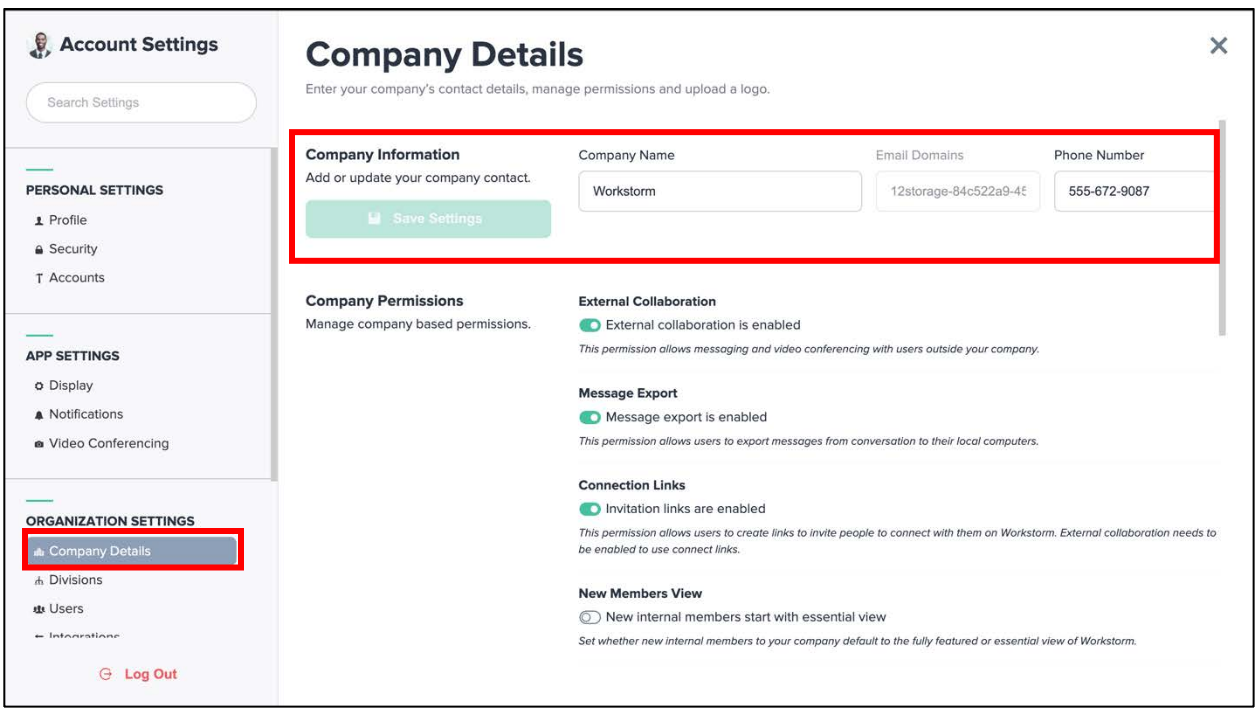
Customize your company profile, permissions, and security preferences.

Company Branding

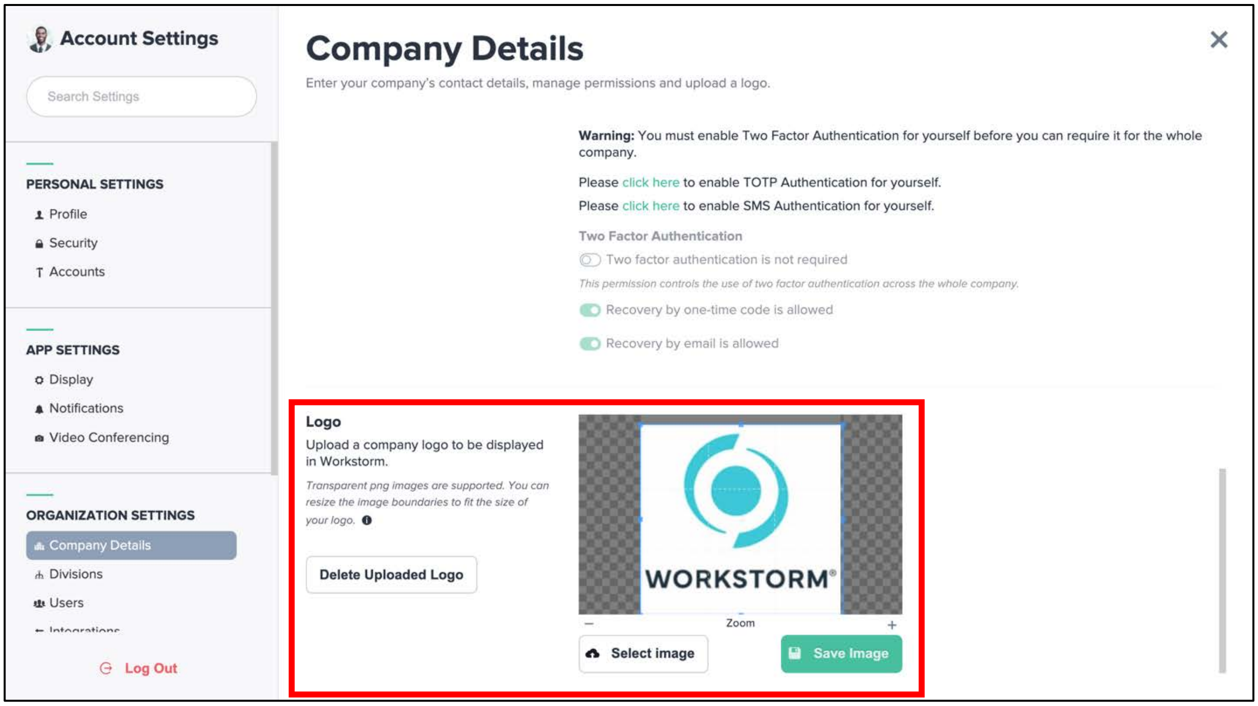
1. Go to *Settings*, and under *Organization Settings*, click **Company Details.**



2. Enter your company name and add a phone number.

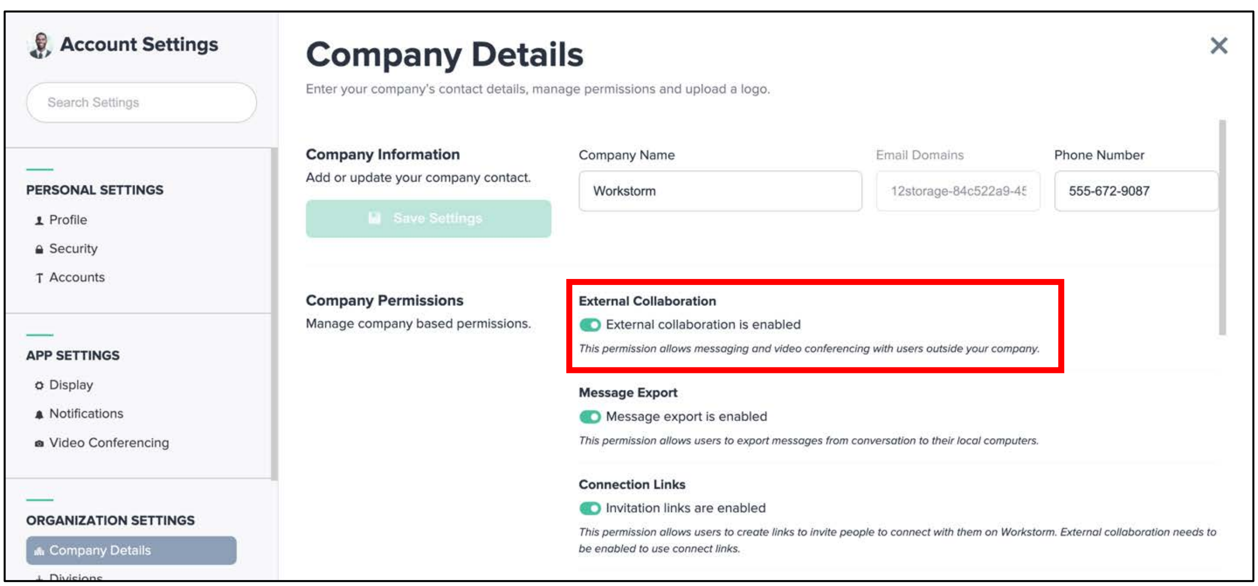


3. Upload a company logo to be displayed in the top-left corner of your Workstorm.



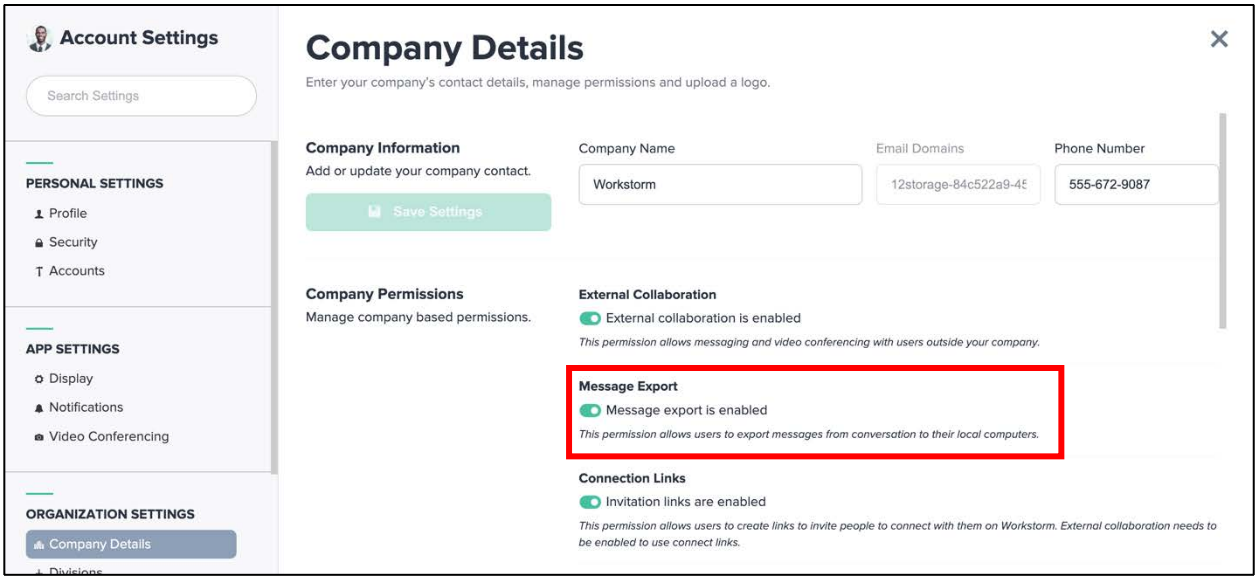
External Collaboration Settings

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



Message Exporting

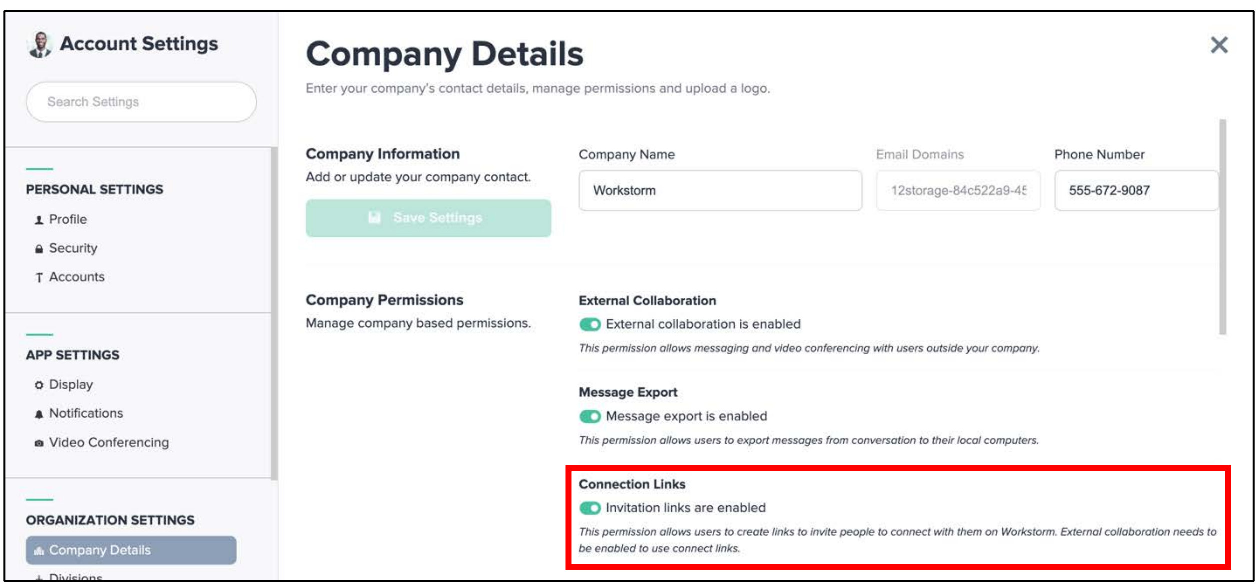
Toggle on to **Message Exporting** to allow members of your company to download message data from their conversations.



Connection Links

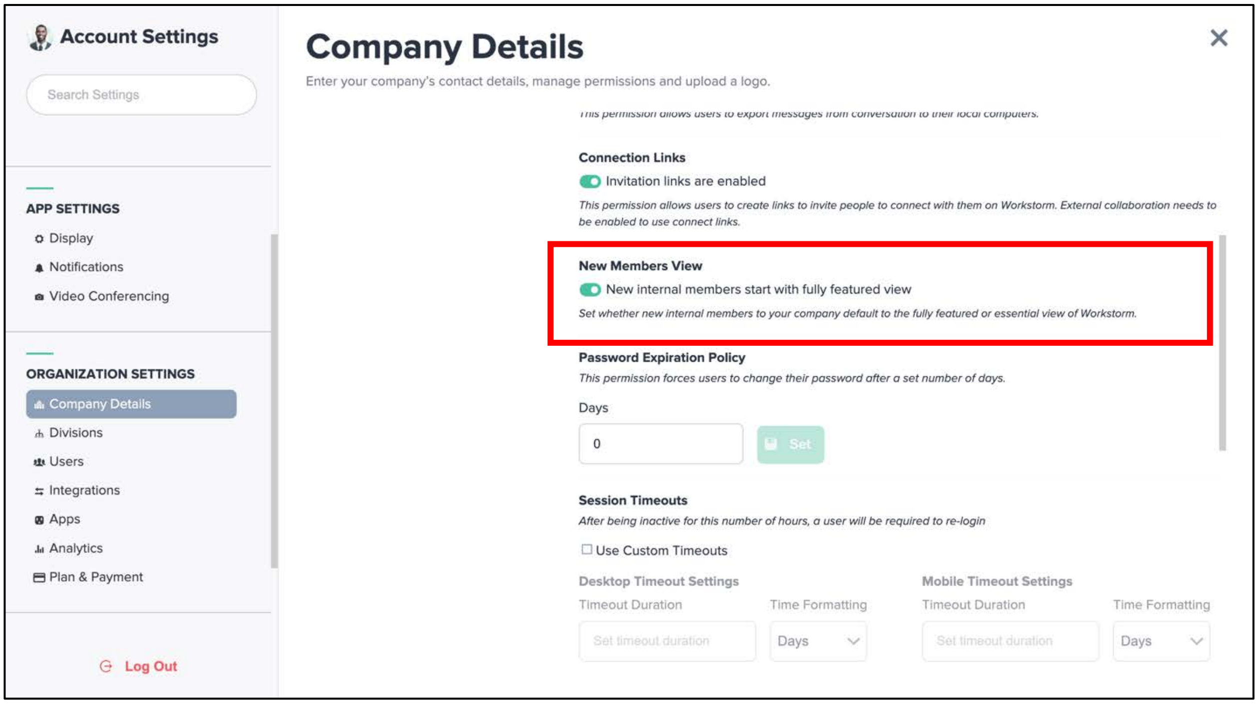
Toggle on **Connection Links** to allow members of your company to use connect links to invite people to the platform.

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



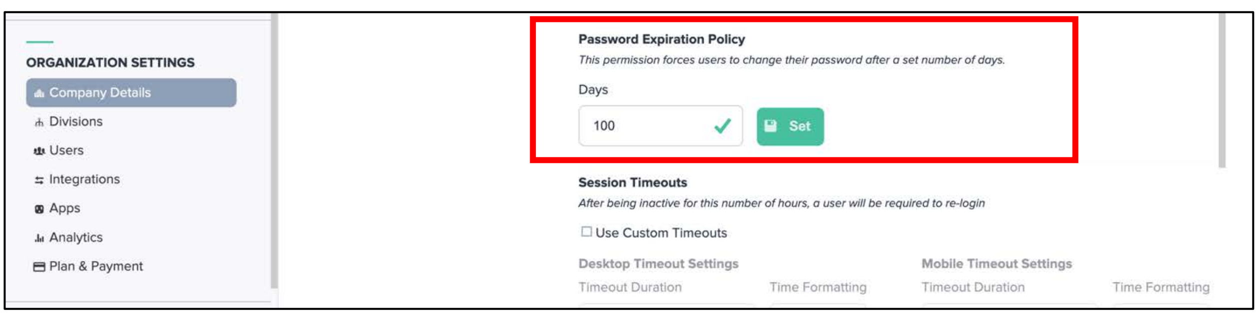
New Member View

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*.



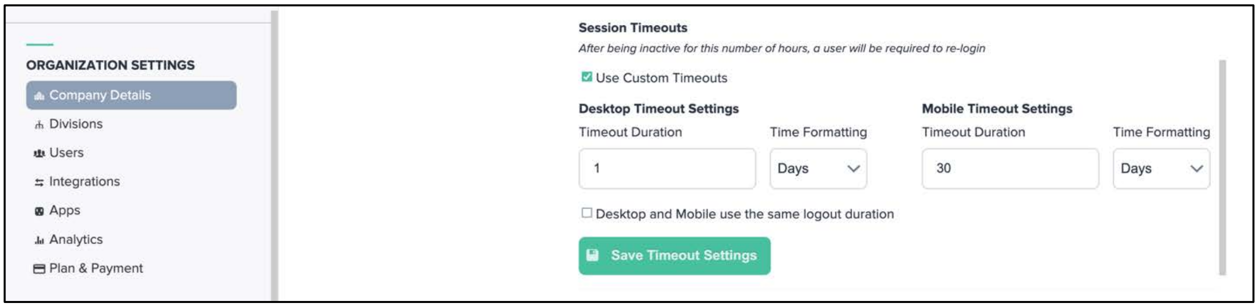
Password Expiration Policy

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

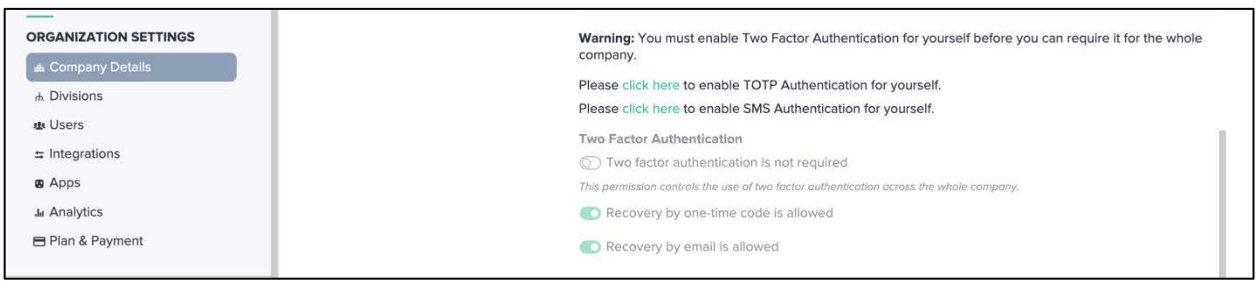
For both Desktop and Mobile, set a time duration in hours or days for how long the user can stay inactive before being logged out. Customize Desktop and Mobile timeout settings separately, or check the box to make them the same.



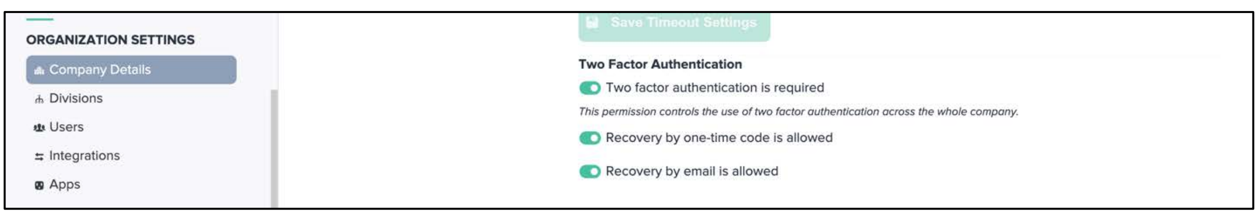
Two Factor Authentication (2FA)

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.



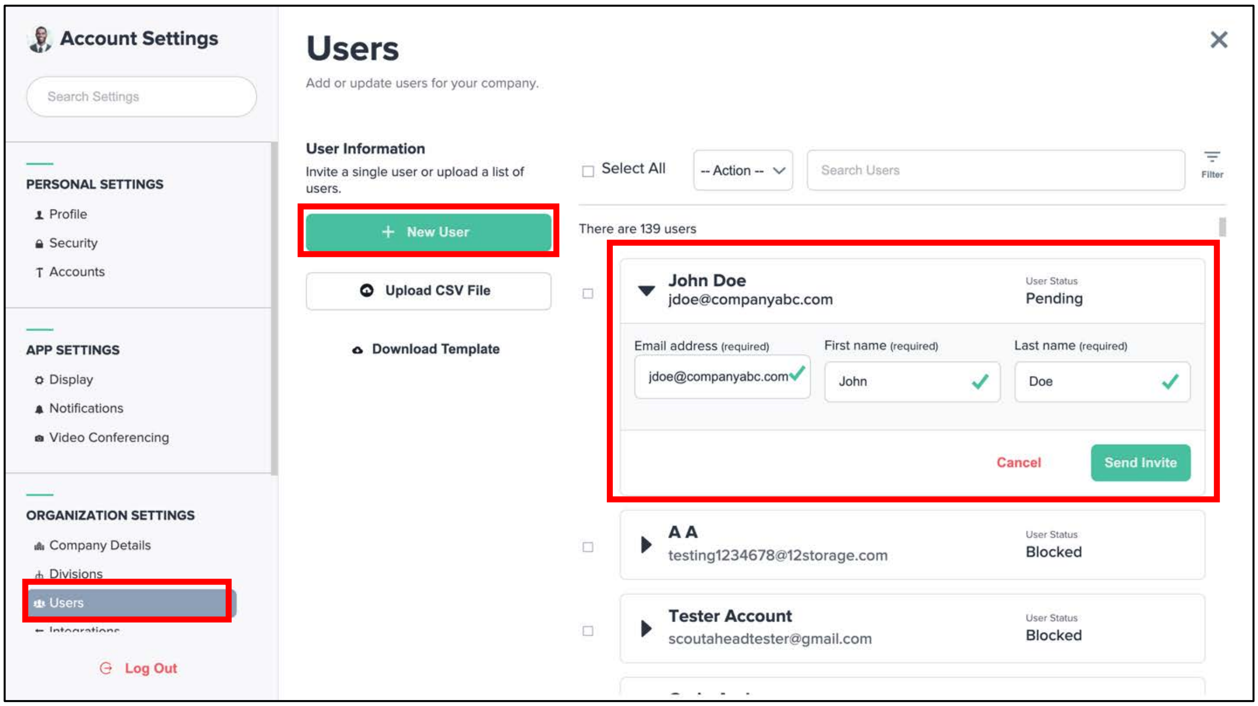
USERS

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

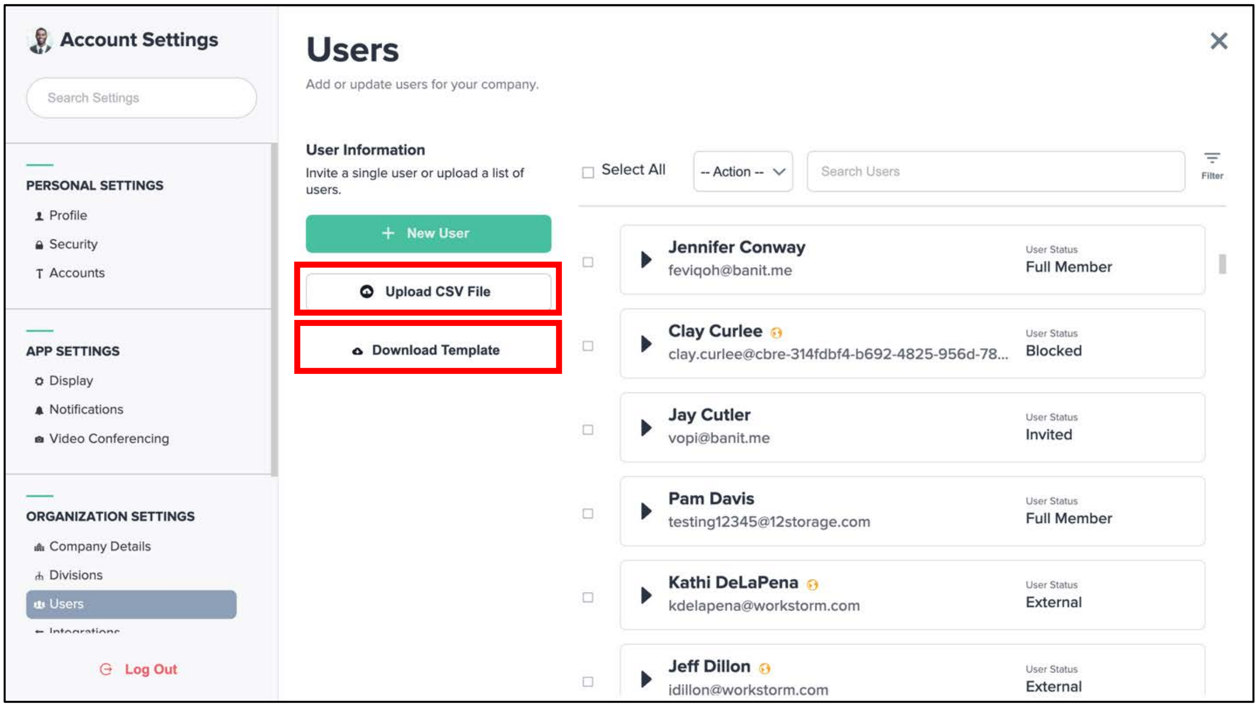
1. Go to *Settings*, and under *Organization Settings*, click **Users.**
2. Click the green **New User** button.
3. Type the person's email address and name.
4. Click **Send Invite** to issue an email invitation .

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



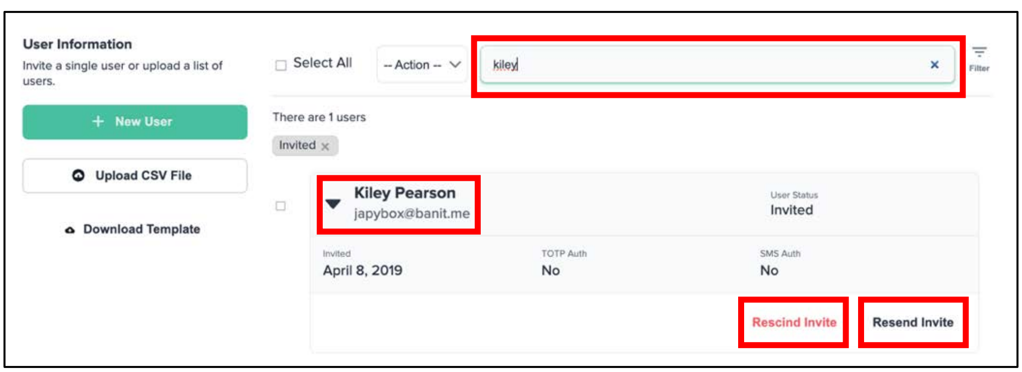
There is also an option to invite members in bulk:

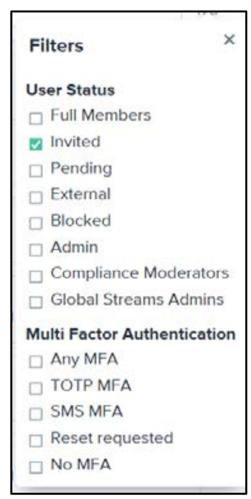
1. Click **Download Template** to download a formatted spreadsheet.
2. In the spreadsheet, enter the details of the colleagues you wish to add to your company.
3. Save the file in CSV format, then click **Upload CSV File** and upload the file.



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.





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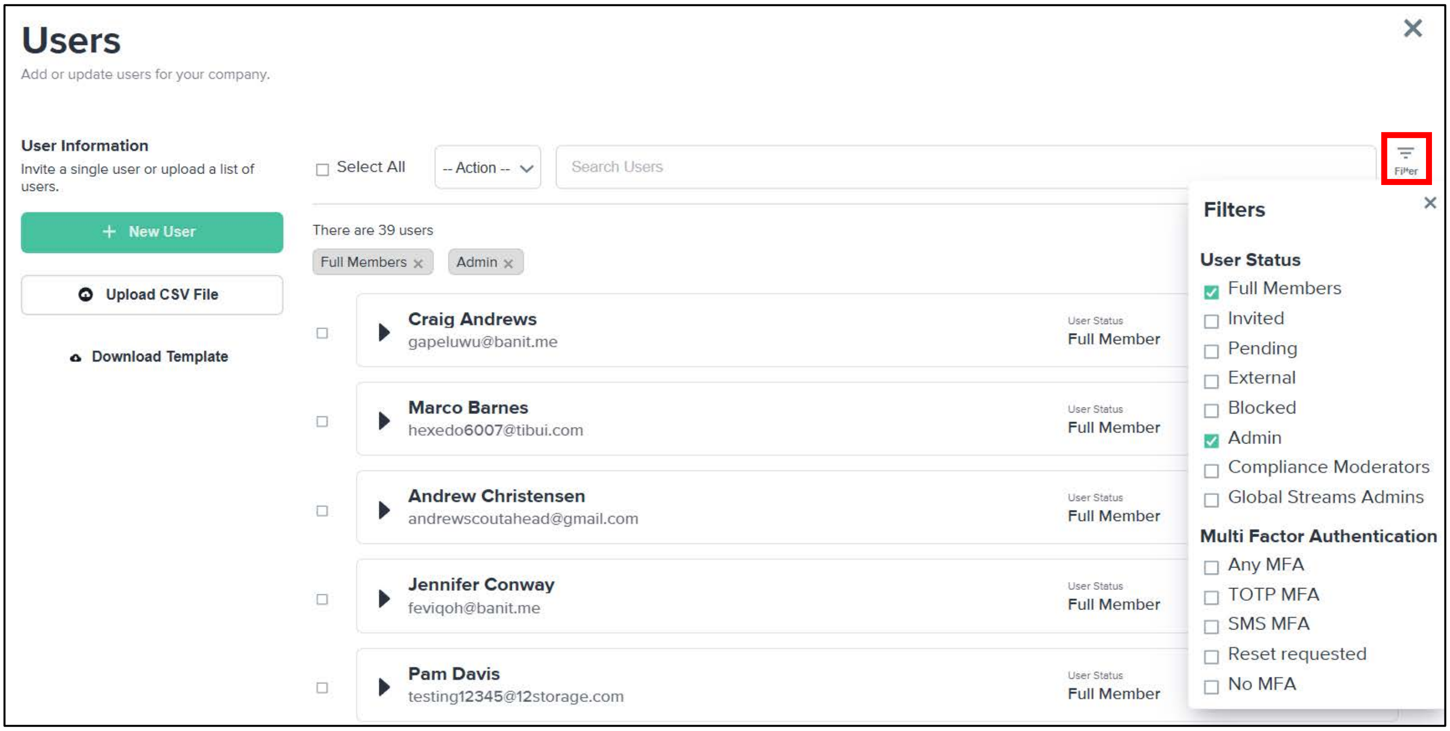
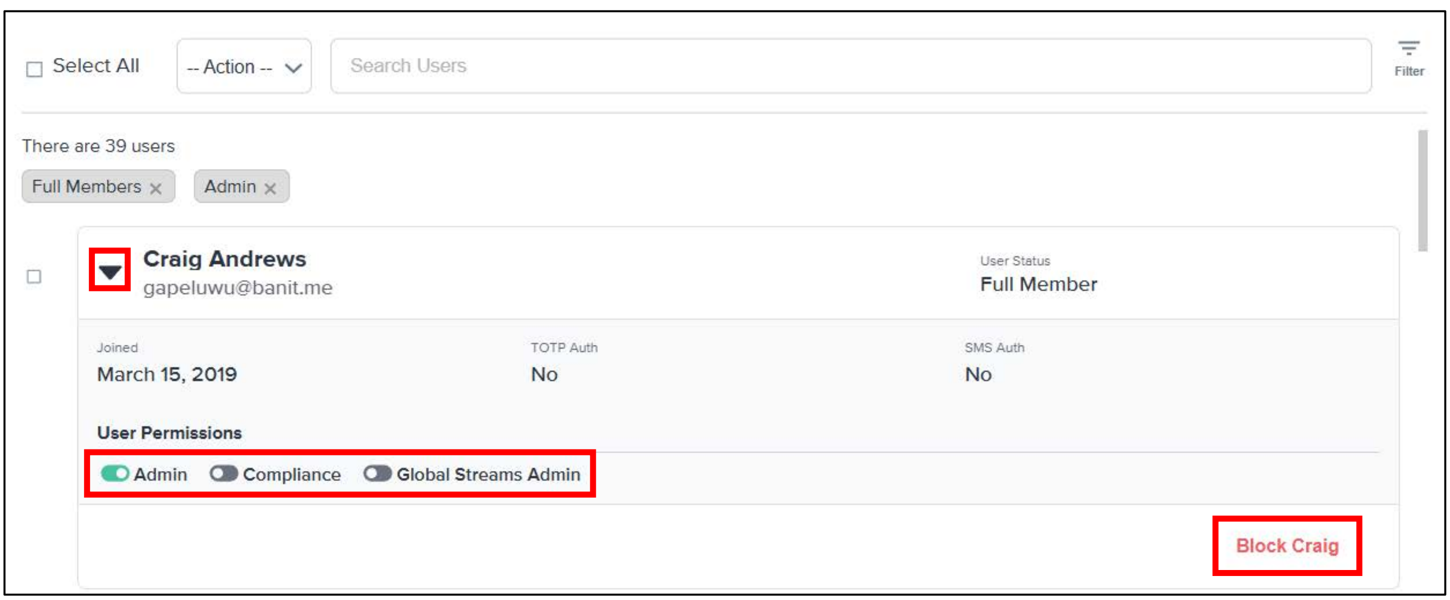
Managing Members

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*.

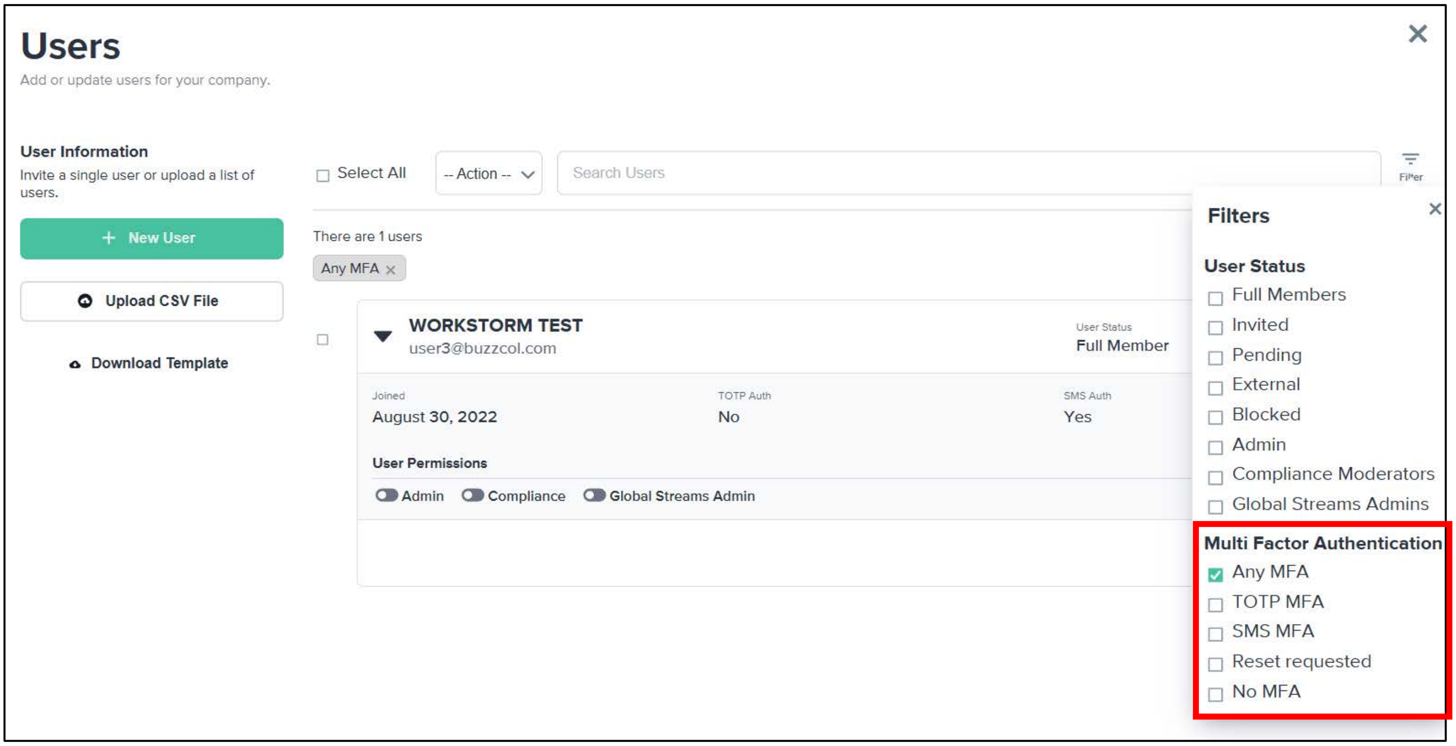


Click the dropdown arrow to the left of the user's name to see more information, as well as manage user permissions. Click **Block** to bar a member from accessing the company's Workstorm.



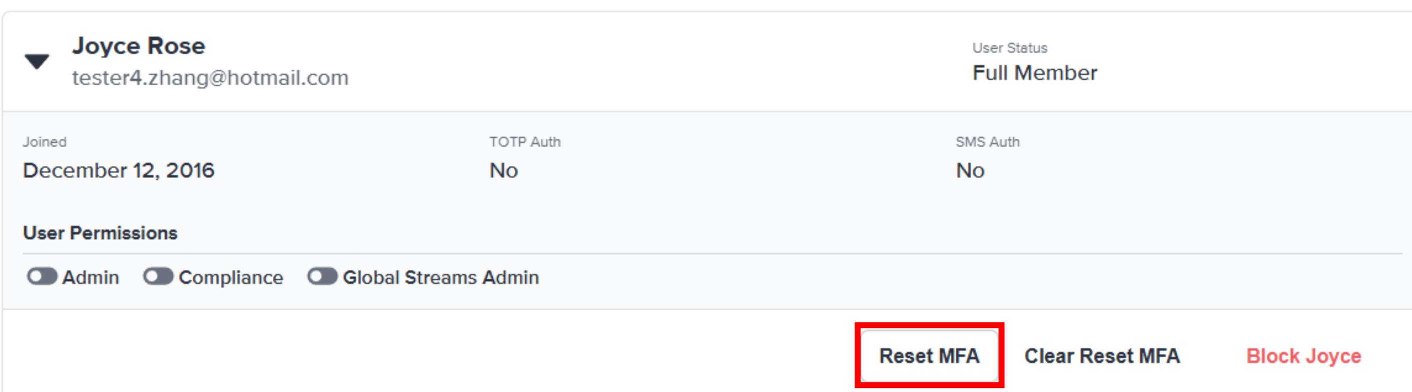
Note: For additional information about managing user permissions, as well as the specific privileges associated with each of the three above roles, please click here.

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

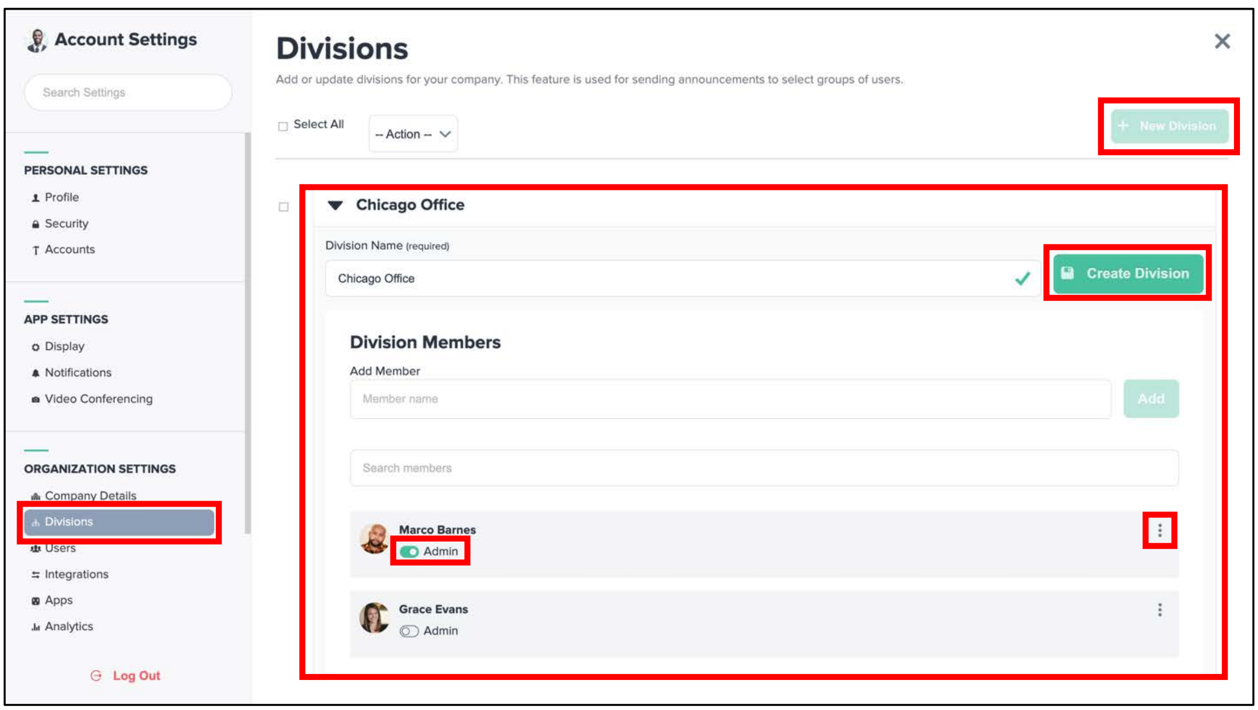
Create *Divisions* for your company to send one-way *Announcements* to select groups of members. *Divisions* may mirror a company's departments, offices, or geographies, and are created by the Company Admin.

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.

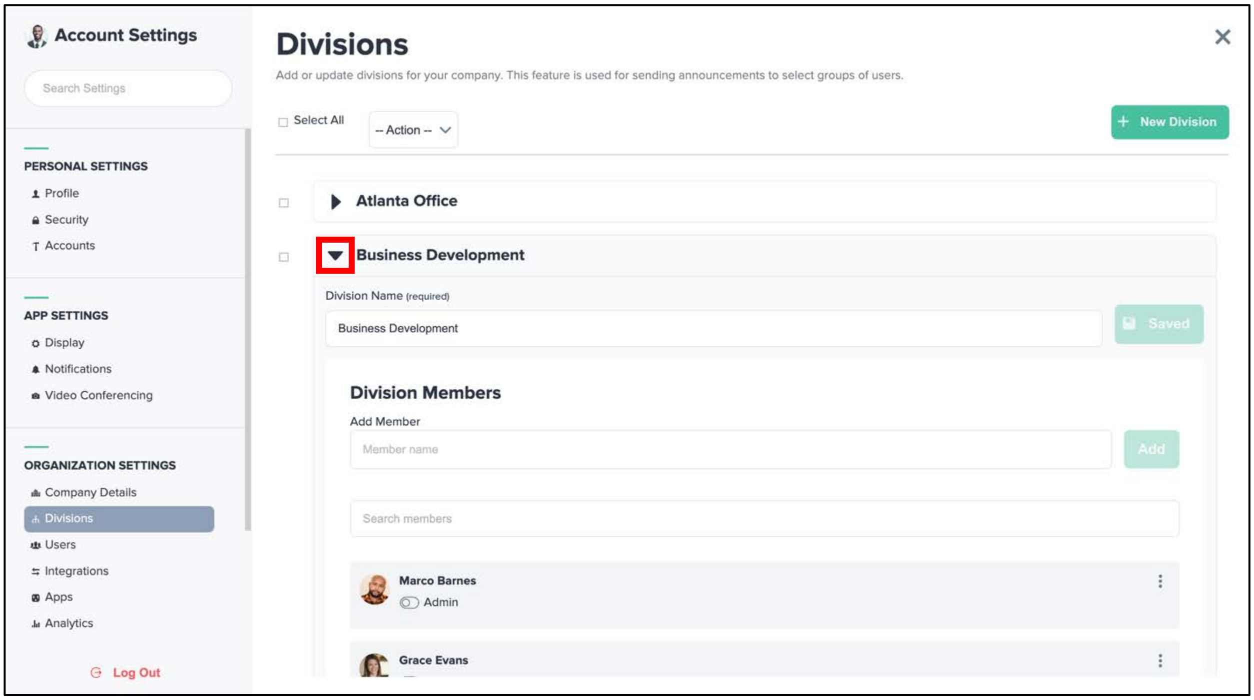
NOTE: Division Admins can send one-way messages in their respective Division Channels, while Company Admins can send messages in all Divisions and do not need to be a division admin to do so.

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.


Account Settings
Search Settings
PERSONAL SETTINGS
Profile
Security
Accounts
APP SETTINGS
Display
Notifications
Video Conferencing
ORGANIZATION SETTINGS
Company Details
Divisions
Users
Integrations
Apps
Analytics
Log Out
Divisions
Add or update divisions for your company. This feature is used for sending announcements to select groups of users.
Select All
-- Action --
New Division
Atlanta Office
Business Development
Division Name (required)
Business Development
Saved
Division Members
Add Member
Member name
Add
Search members
Marco Barnes
Admin
Grace Evans

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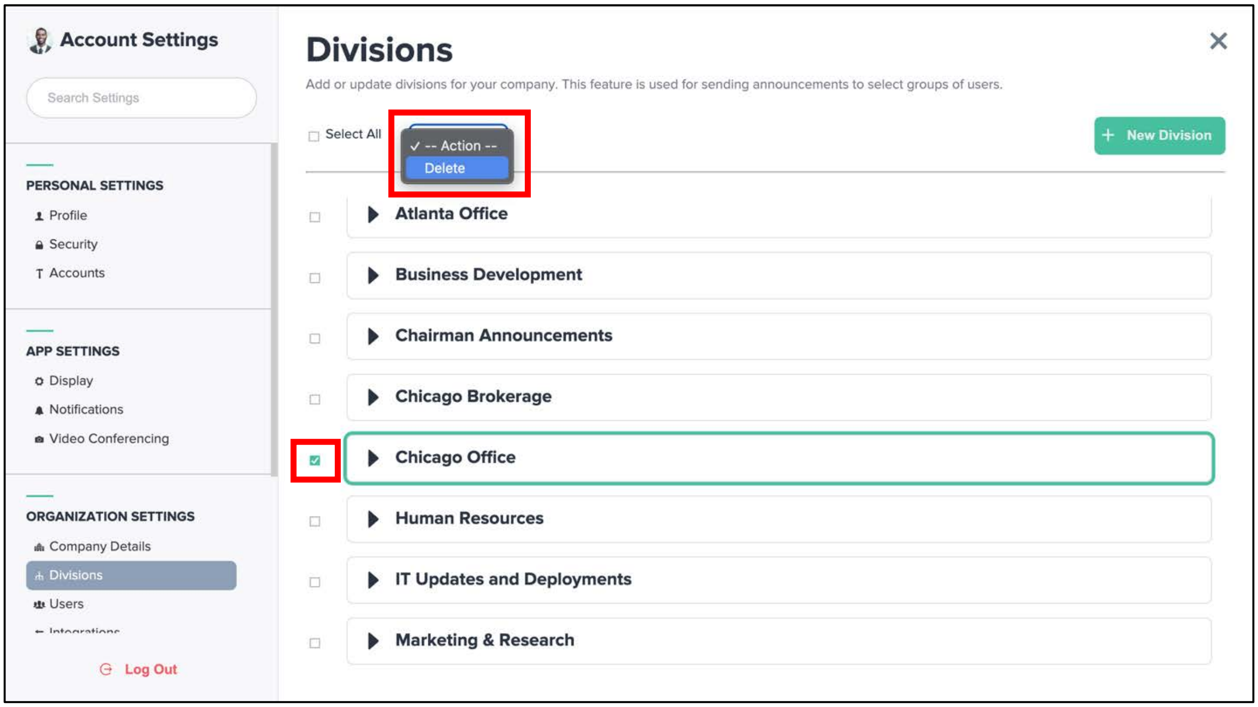
To delete a Division, check the box to its left. Then, click the **Action** dropdown menu at the top of your screen and select **Delete**.

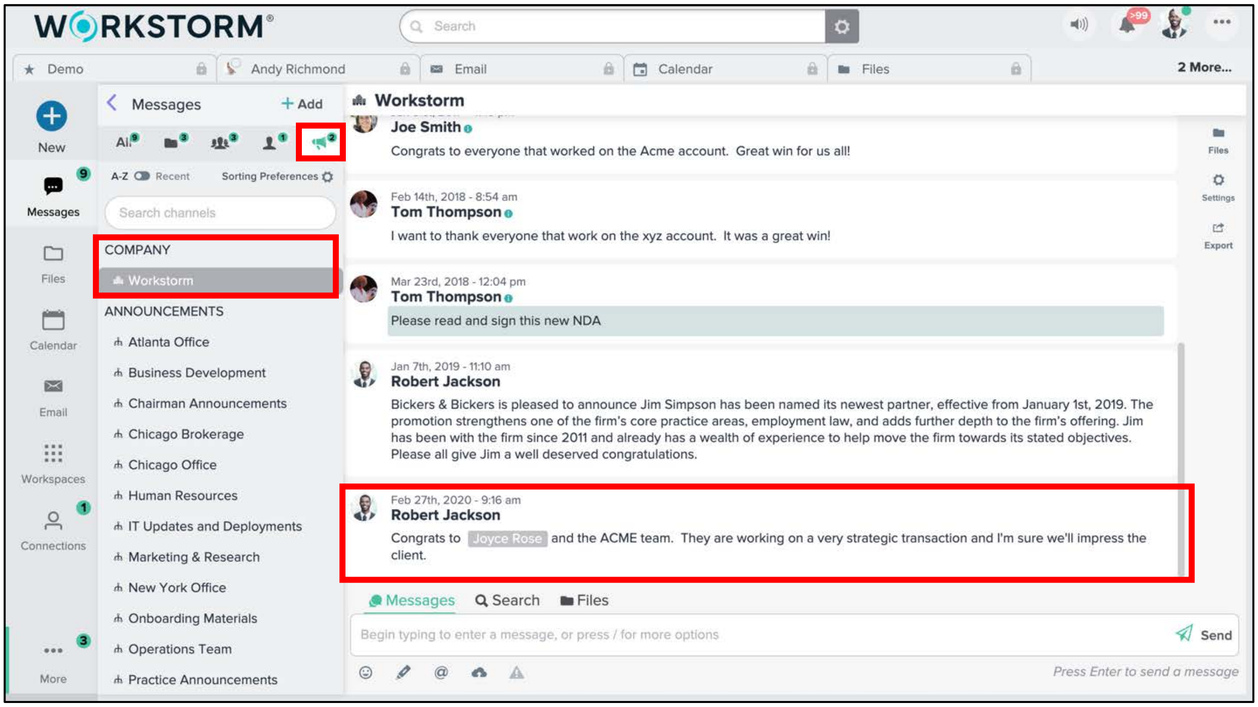


ANNOUNCEMENTS

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

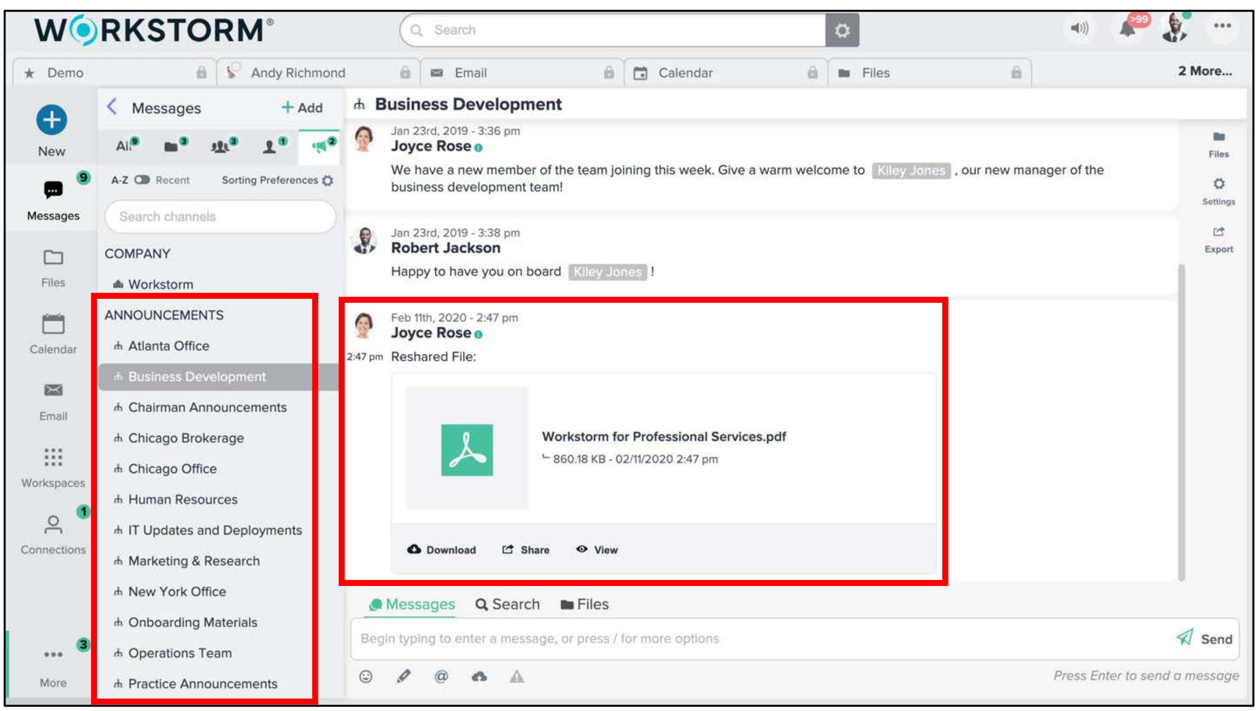
Company Announcements

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.



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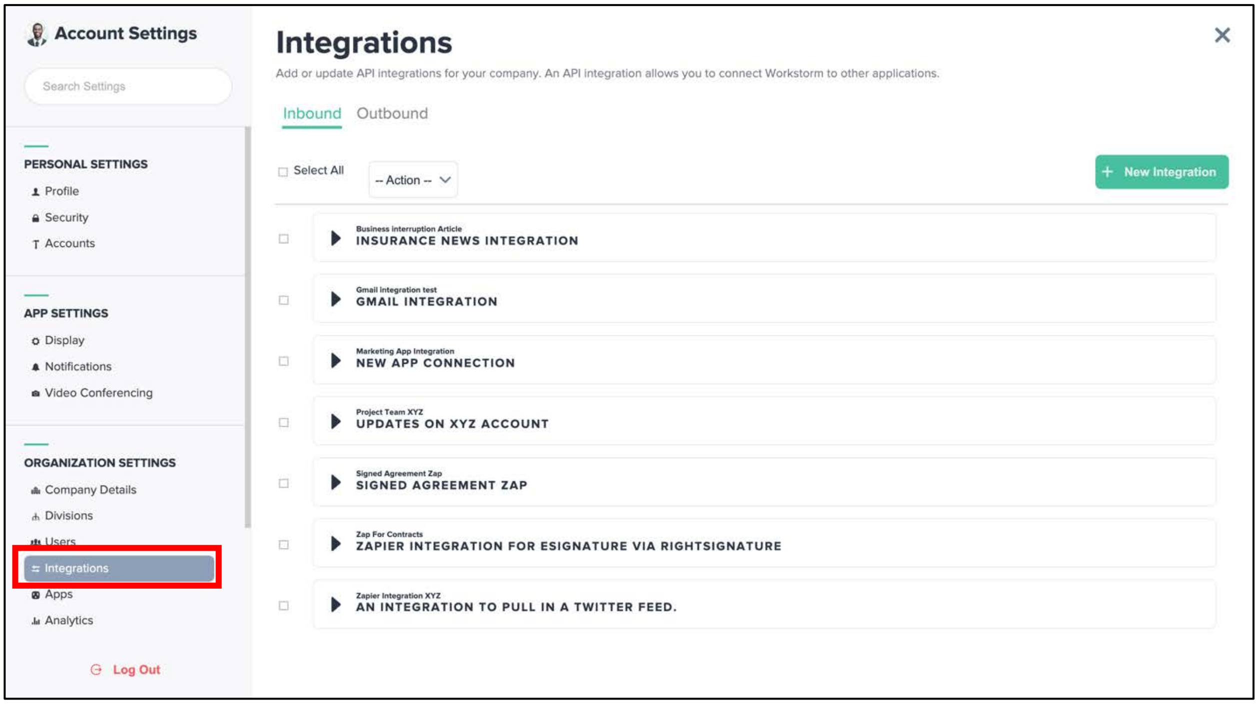
INTEGRATIONS

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.**



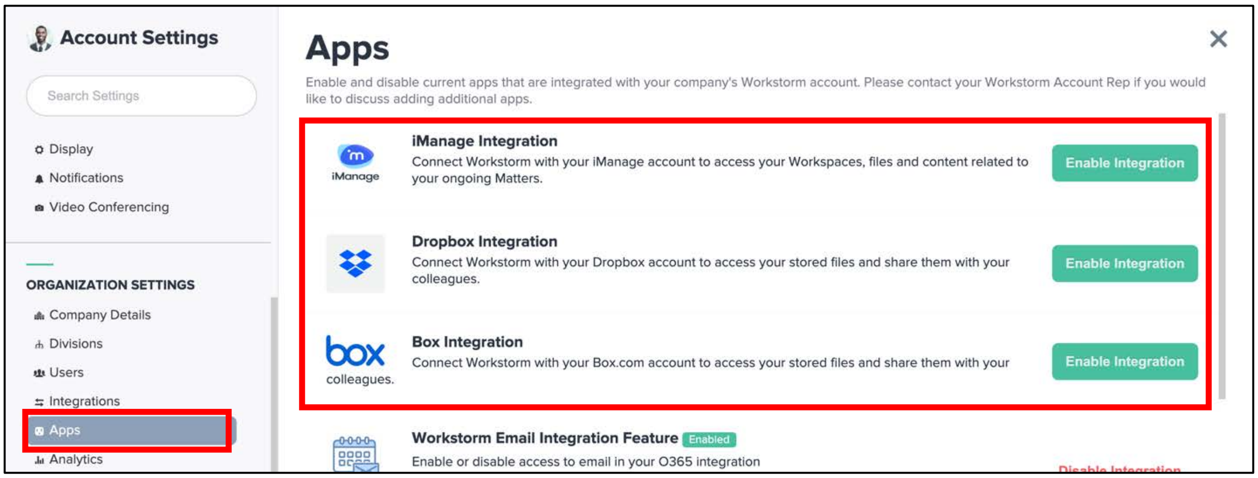
APPS

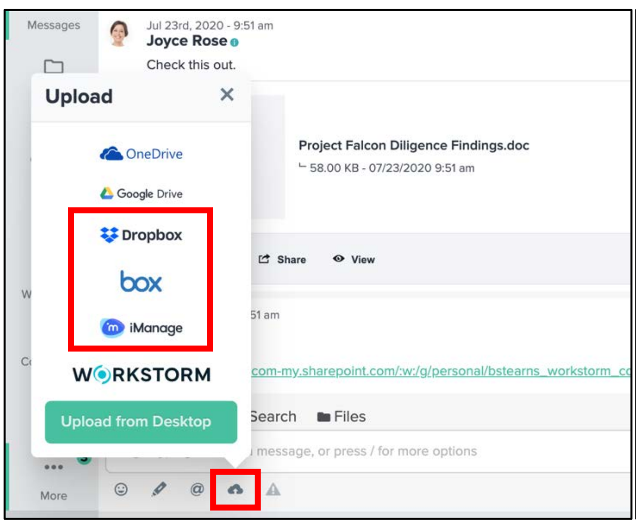
Enable or disable apps that are integrated with your company out-of-the-box.

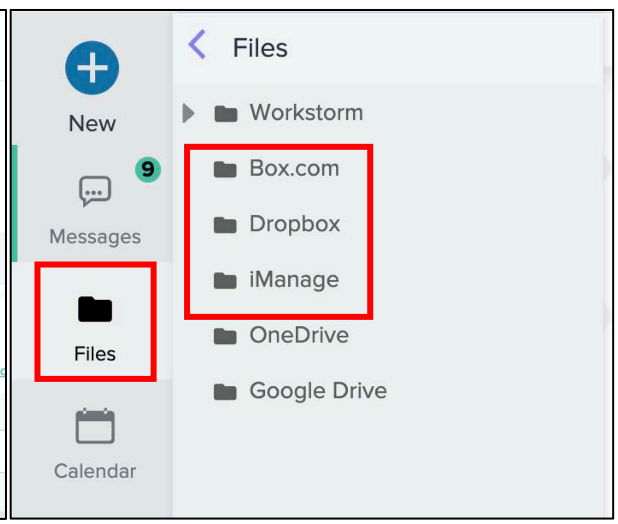
Document Management Systems (DMS)

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.

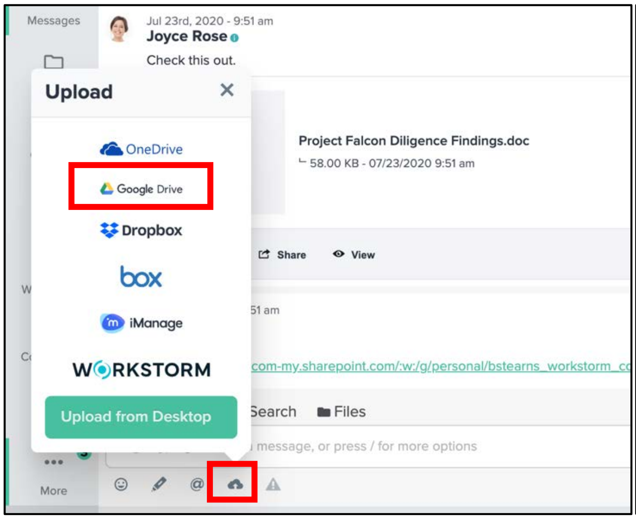


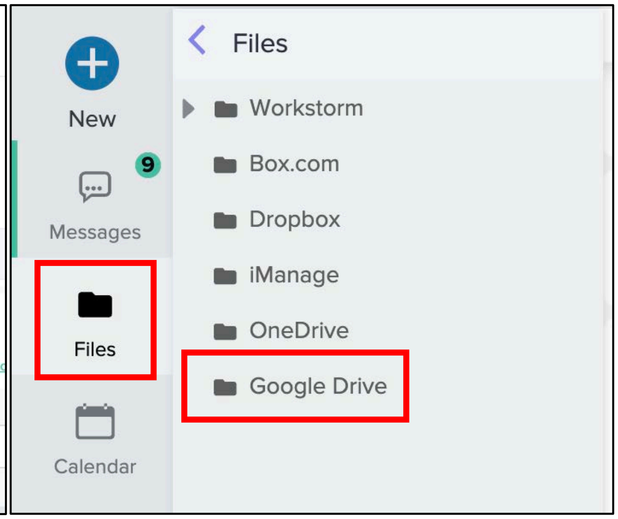


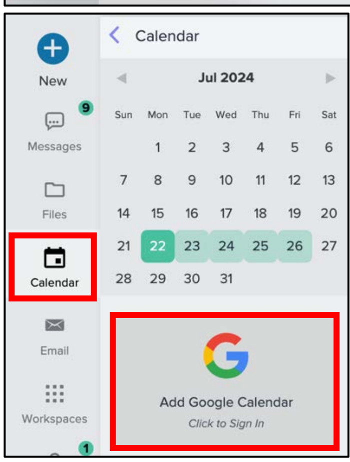


Google Workspace

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

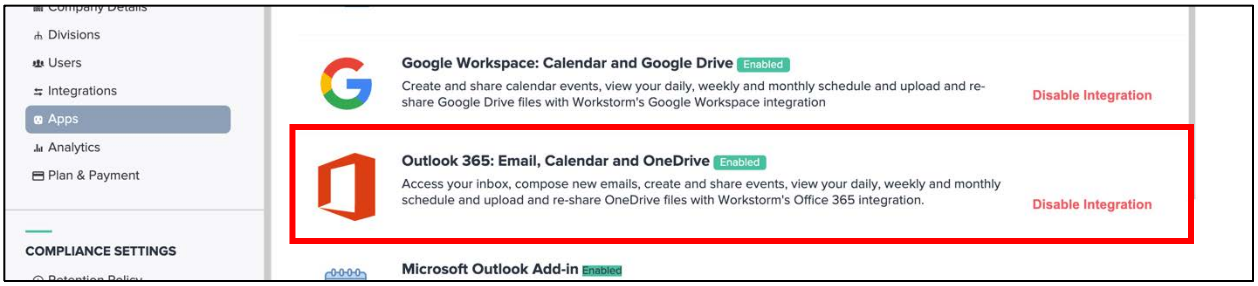


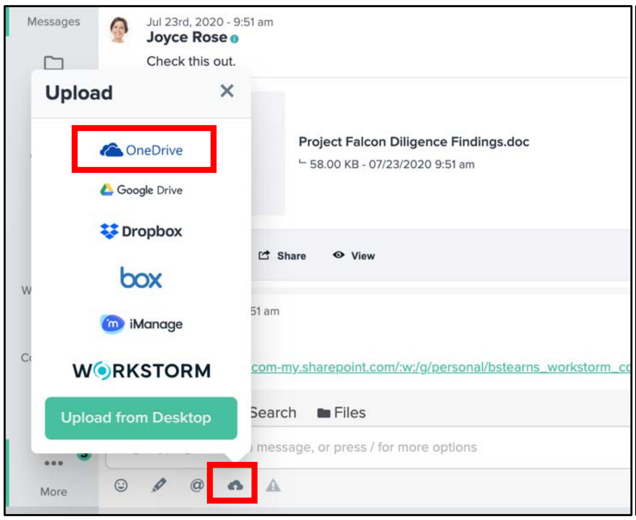


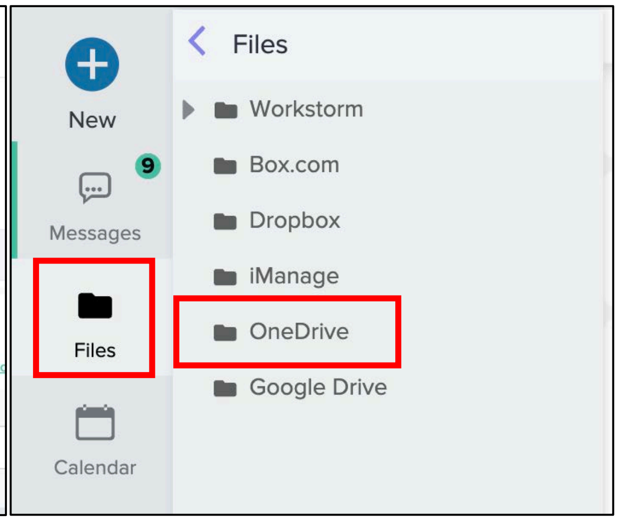


Office 365

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

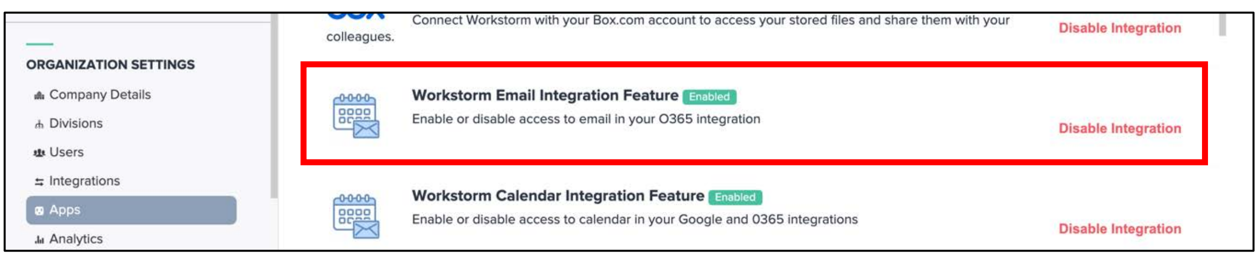






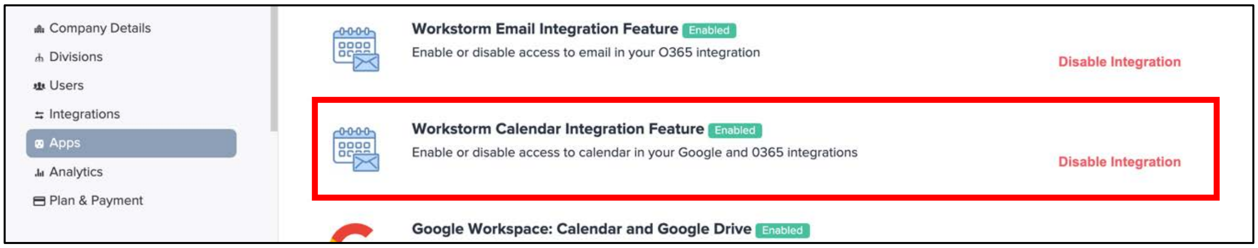
Customize Email

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.



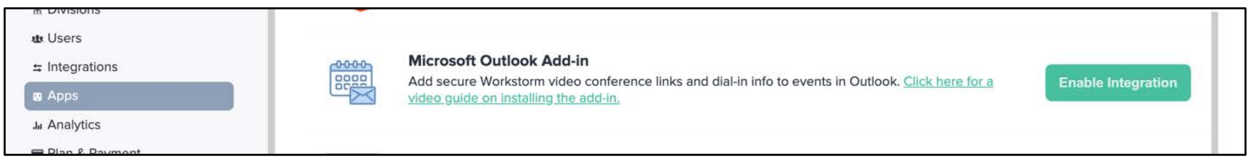
Customize Calendar

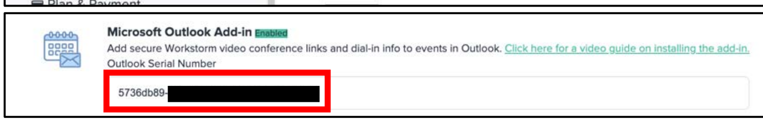
By default, *Calendar* is enabled as part of the Google and Office 365 integrations. Click **Disable Integration** to remove access to Google and Outlook Calendars for the company.



Outlook Add-in

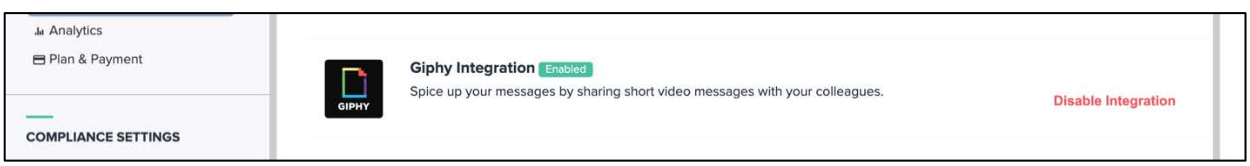
By default, the Outlook Add-in is disabled for the company. Click **Enable Integration** to allow the company to use the Outlook Add-in for Workstorm. The add-in allows members to attach Workstorm *Video Conferen*ce links to their events in the Outlook app. Company members will need the provided serial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





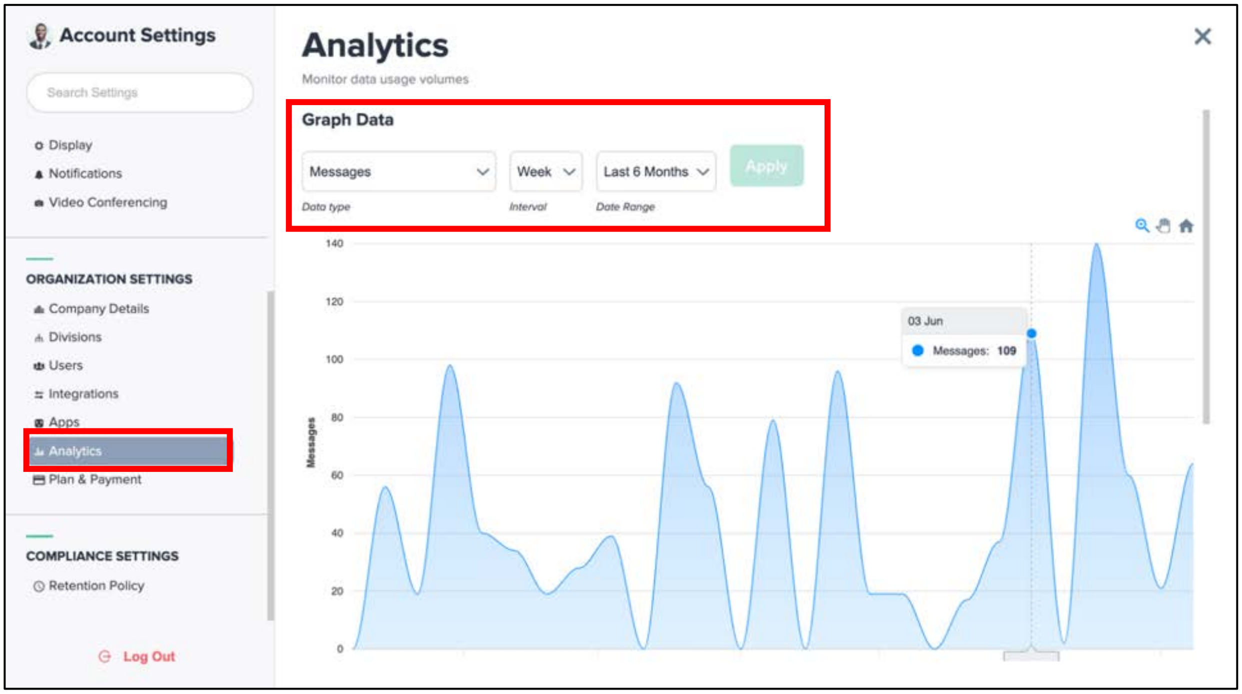
Giphys

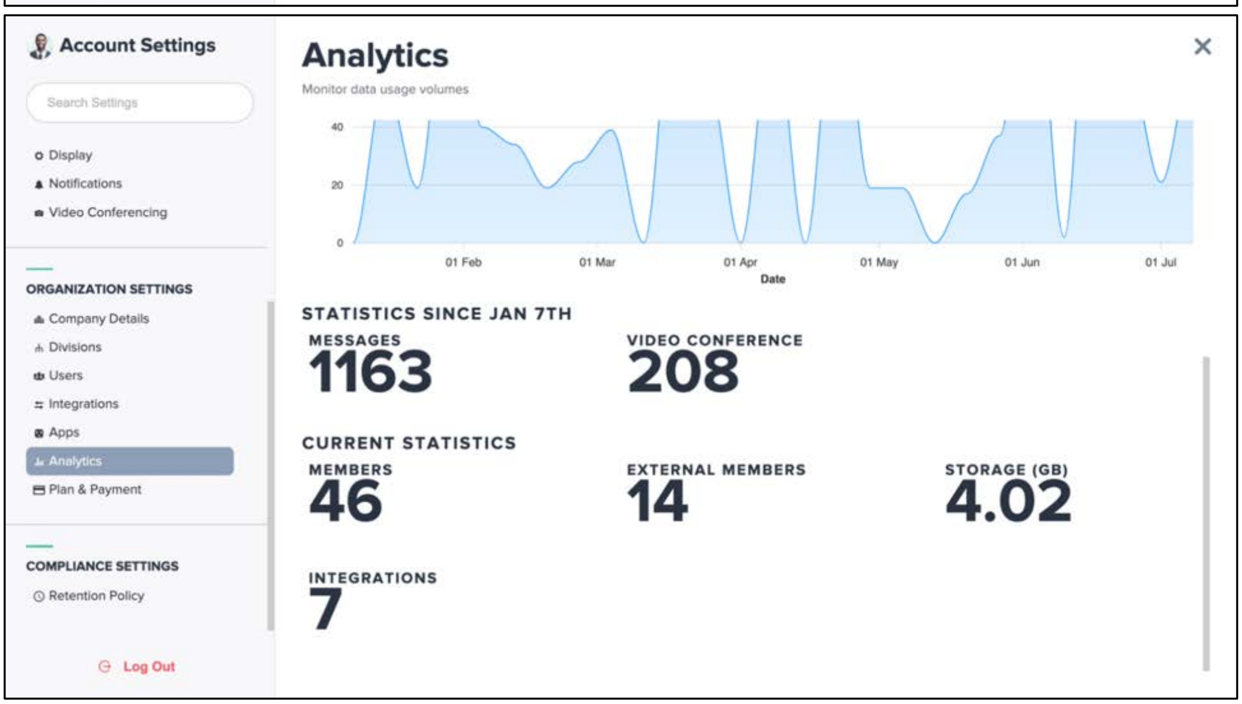
By default, *Giphy* is enabled for the company. Click **Disable Integration** to disable *Giphys* in messaging for the company.



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.



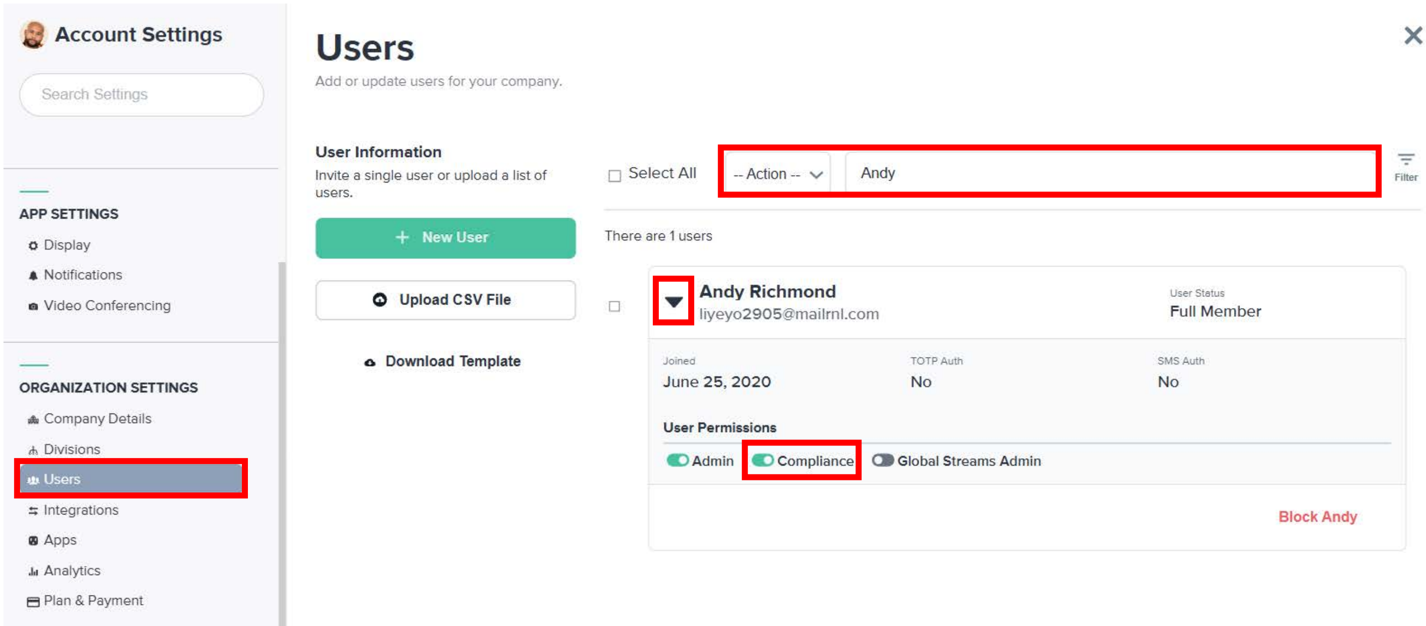


COMPLIANCE

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

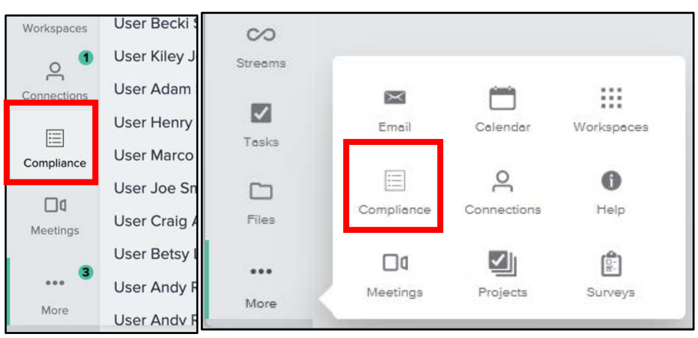
Go to *Settings*, and under *Organization Settings*, click **Users.** Search for a company member, then click the dropdown arrow to the left of their name. Toggle on **Compliance** to grant compliance moderator privileges to the chosen member.



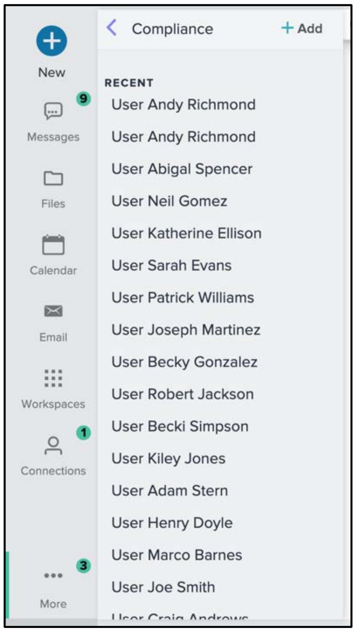
Completing an Audit

Only compliance moderators can complete an audit.

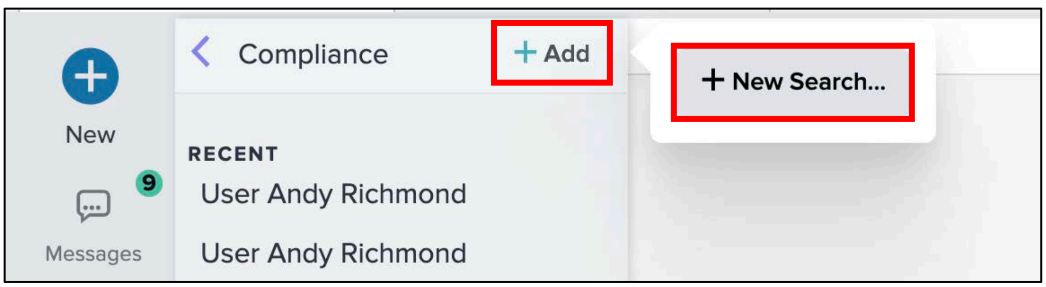
1. Click the **Compliance** icon from the left sidebar or **More** menu.



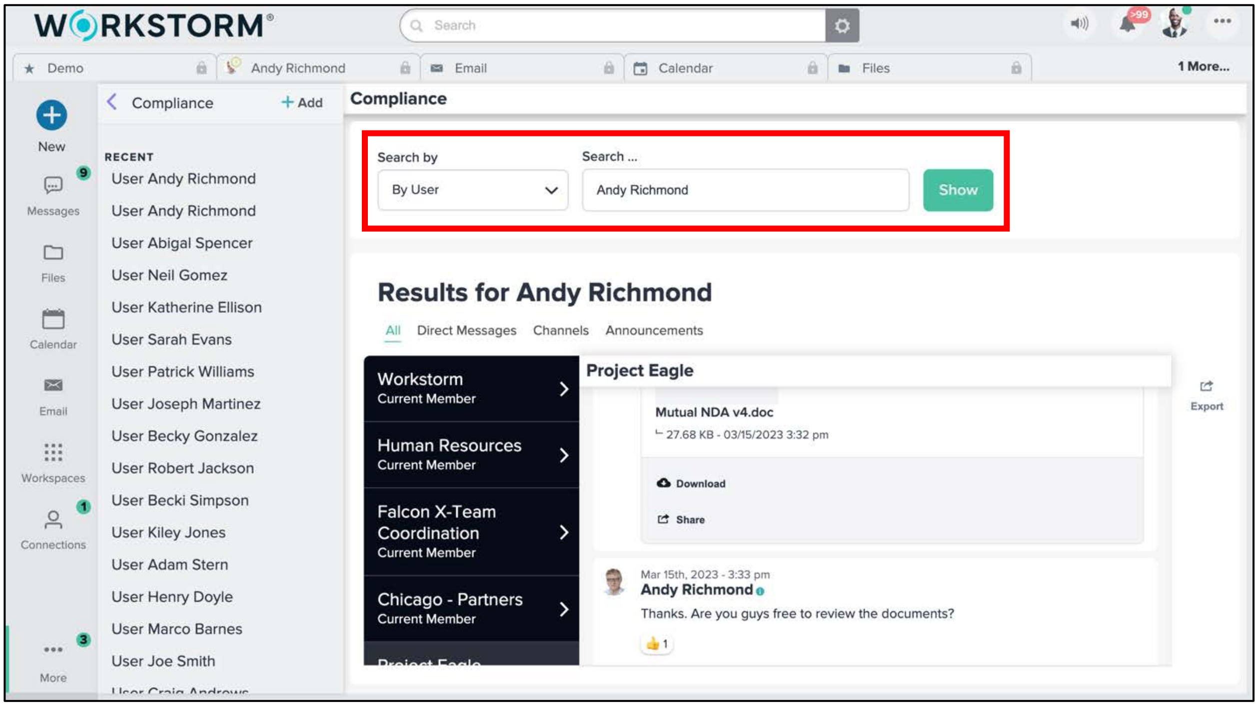
2. A history of recent compliance searches will appear in the Compliance menu.



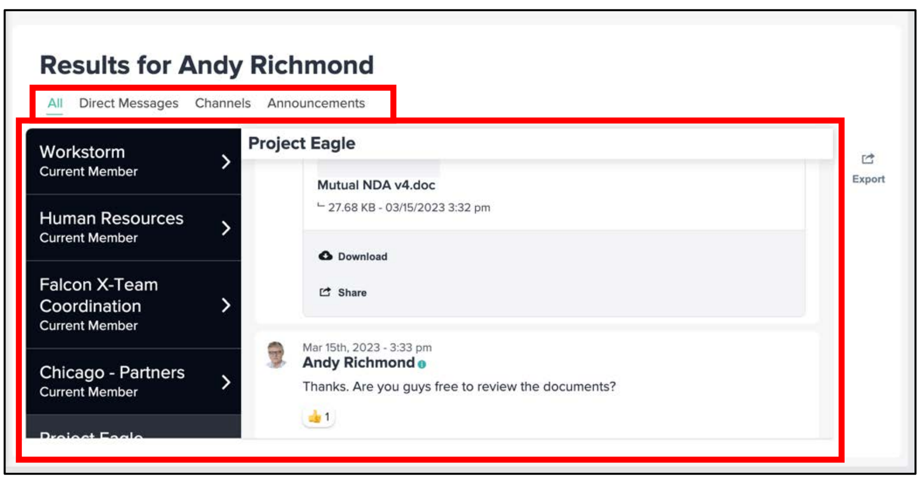
3. Click the **+Add** button at the top right of the *Compliance* menu and select **+New Search**.



4. Search for a company member and select the desired result.
5. Click the green **Show** button to view their messaging and file sharing data.

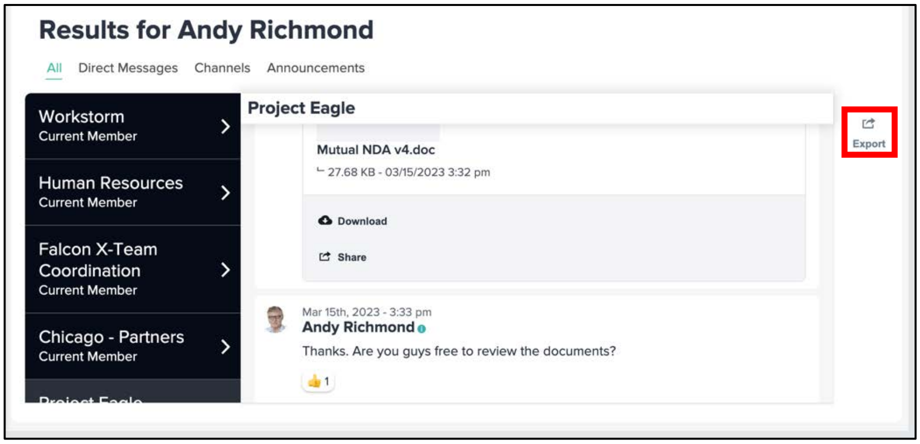


By default, the audit results for a member will show *All* conversations. Filter the results by conversation type, including *Direct Messages*, *Channels* or *Announcements*. Then, select a conversation to view its data, including any deleted messages.

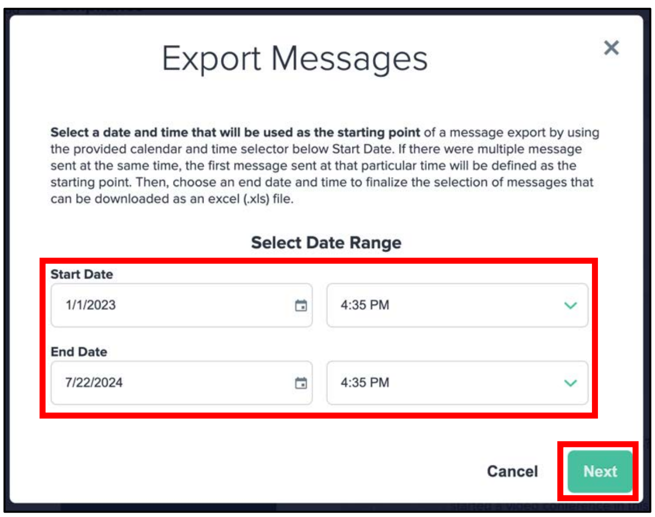


To download the data in an excel (.xls) file format:

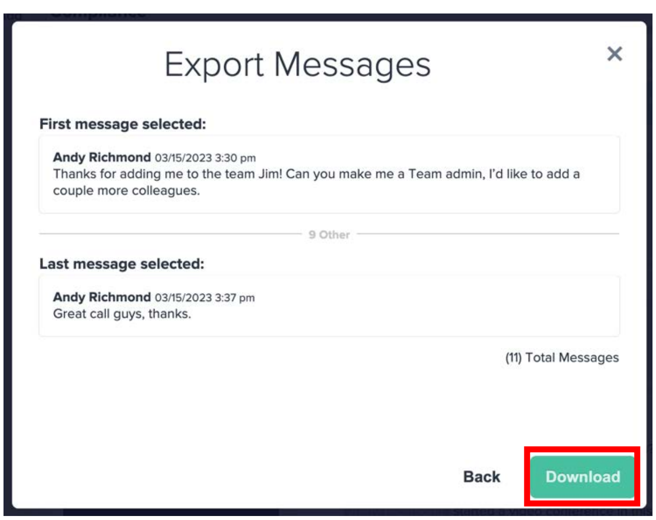
1. Click the **Export** button on the right-side of the compliance module



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



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



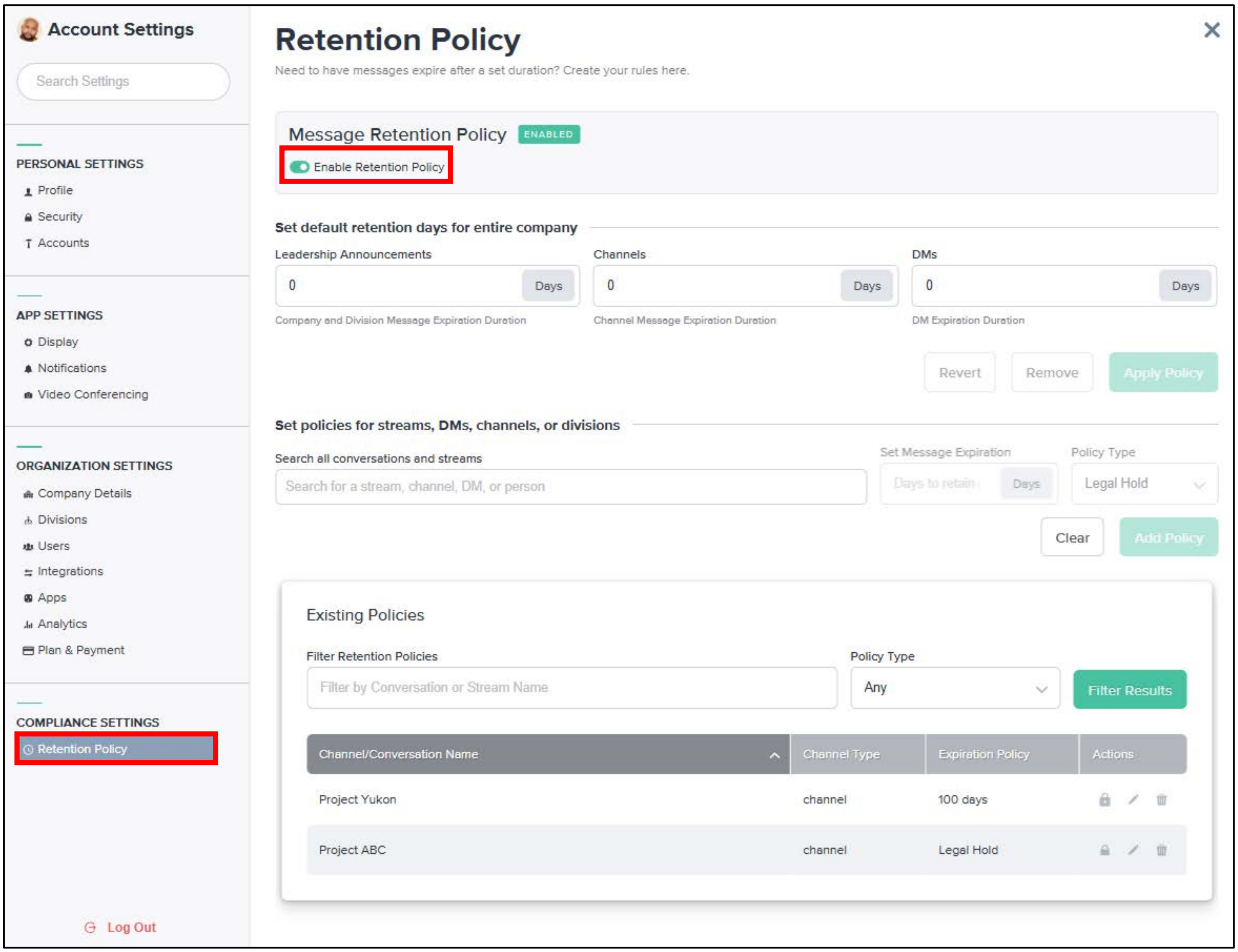
SET RETENTION POLICIES

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

Enabling Retention Policy

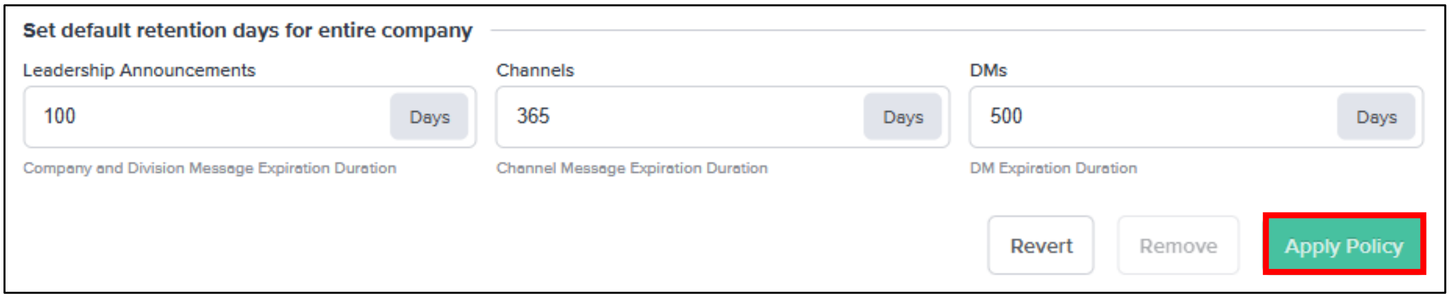
Only compliance moderators can access the retention policy feature.

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

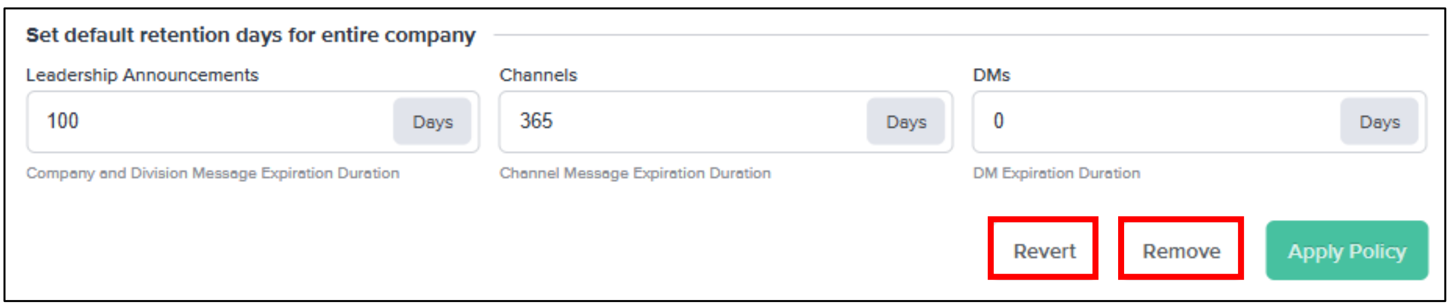


Company-wide Retention Policy

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.



Setting Individual Policies

Use the *Search All Conversations* input to search for a conversation or Stream. Then, choose a duration and policy type (*Expiration* or *Legal Hold*).

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

Click the green **Add Policy** button to save the Expiration or Legal Hold policy. Use the **Clear** button to reset your inputs.

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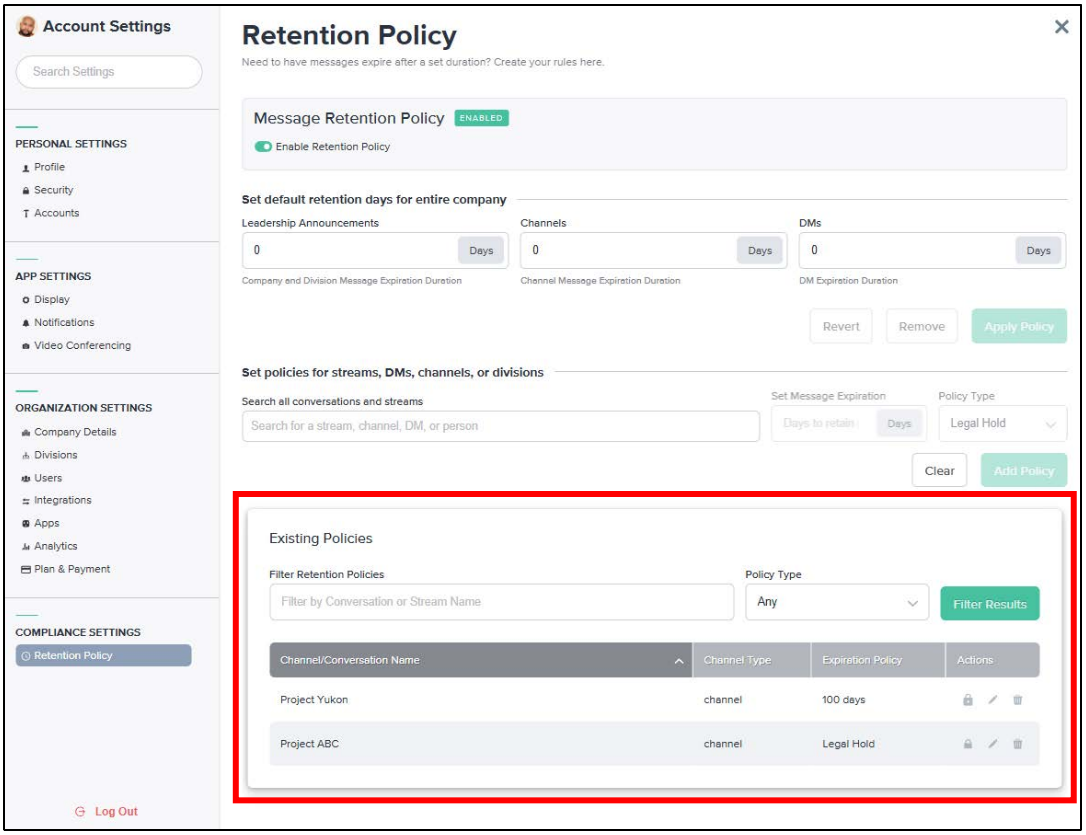
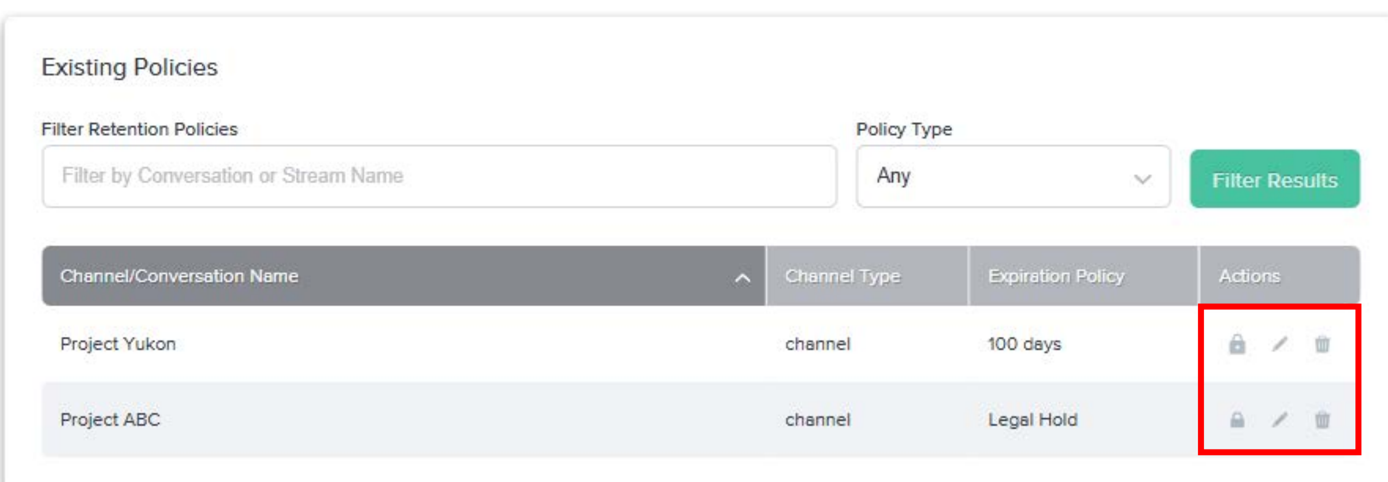
Managing Existing Policies

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).



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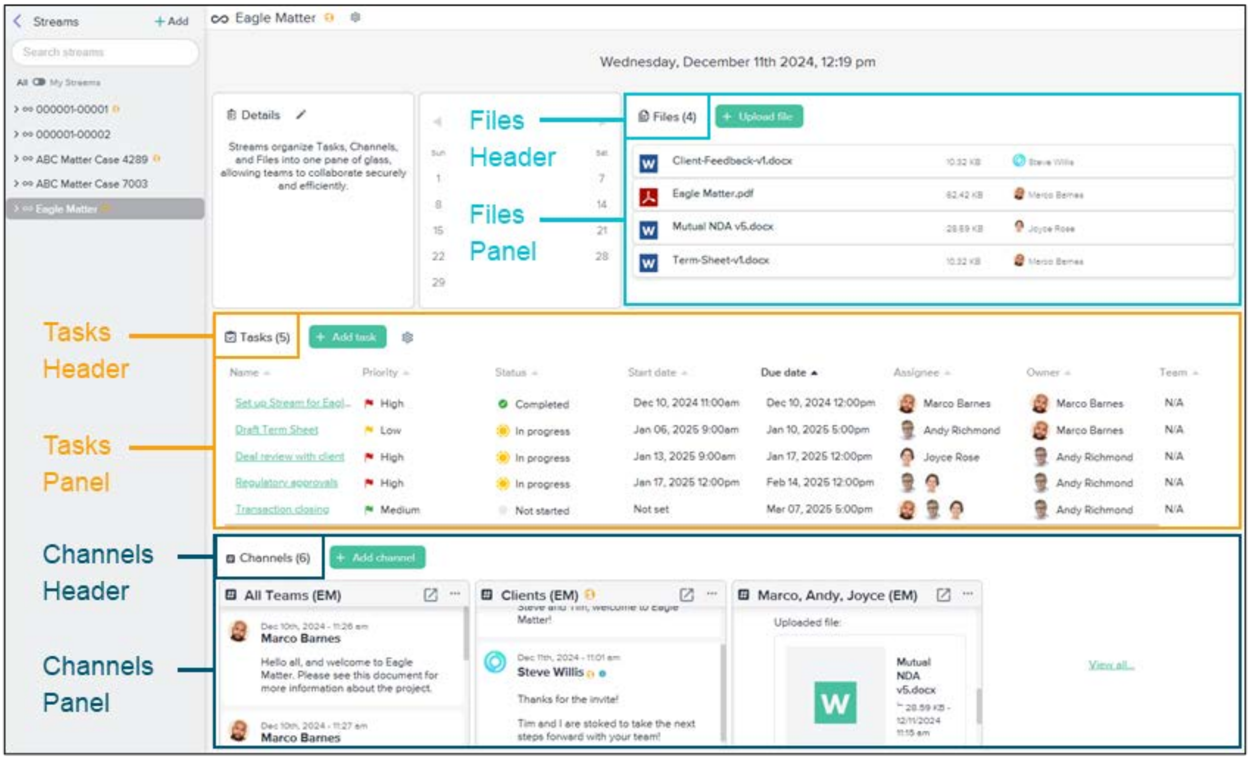
STREAMS

A Stream is a unified dashboard designed to help manage projects and matters. They organize Tasks, Channels, and Files into one pane of glass, allowing teams to collaborate securely and efficiently.

To enable the Streams feature, please contact your account representative.



Appointing Global Streams Admins

To grant GSA 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 Streams Admin.**

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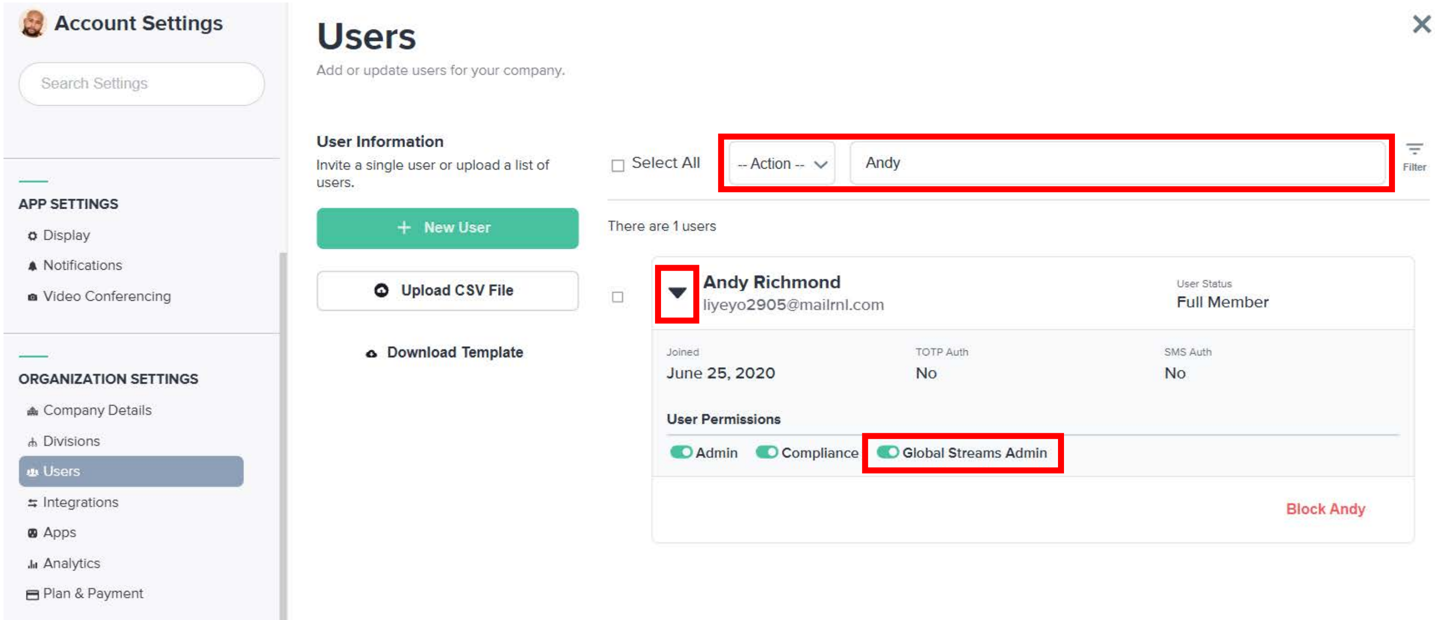
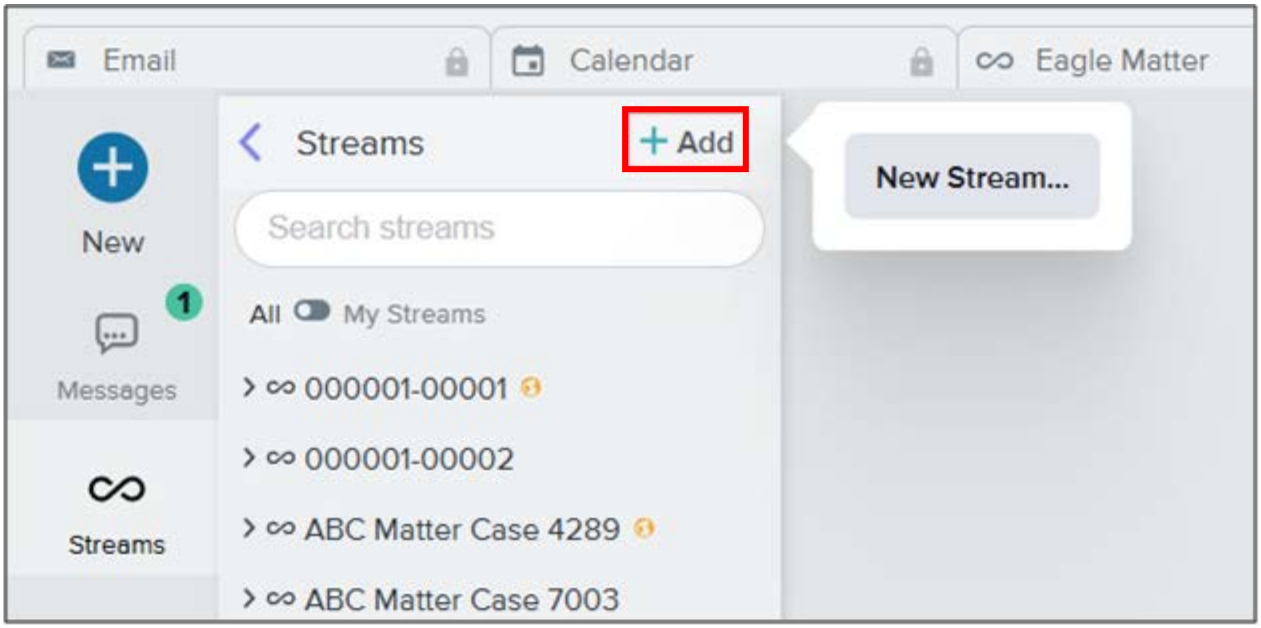

Account Settings
Search Settings
APP SETTINGS
Display
Notifications
Video Conferencing
ORGANIZATION SETTINGS
Company Details
Divisions
Users
Integrations
Apps
Analytics
Plan & Payment
Users
Add or update users for your company.
User Information
Invite a single user or upload a list of users.
New User
Upload CSV File
Download Template
Select All
-- Action --
Andy
Filter
There are 1 users
Andy Richmond
liyeyo2905@mailrnl.com
User Status
Full Member
Joined
June 25, 2020
TOTP Auth
No
SMS Auth
No
User Permissions
Admin
Compliance
Global Streams Admin
Block Andy

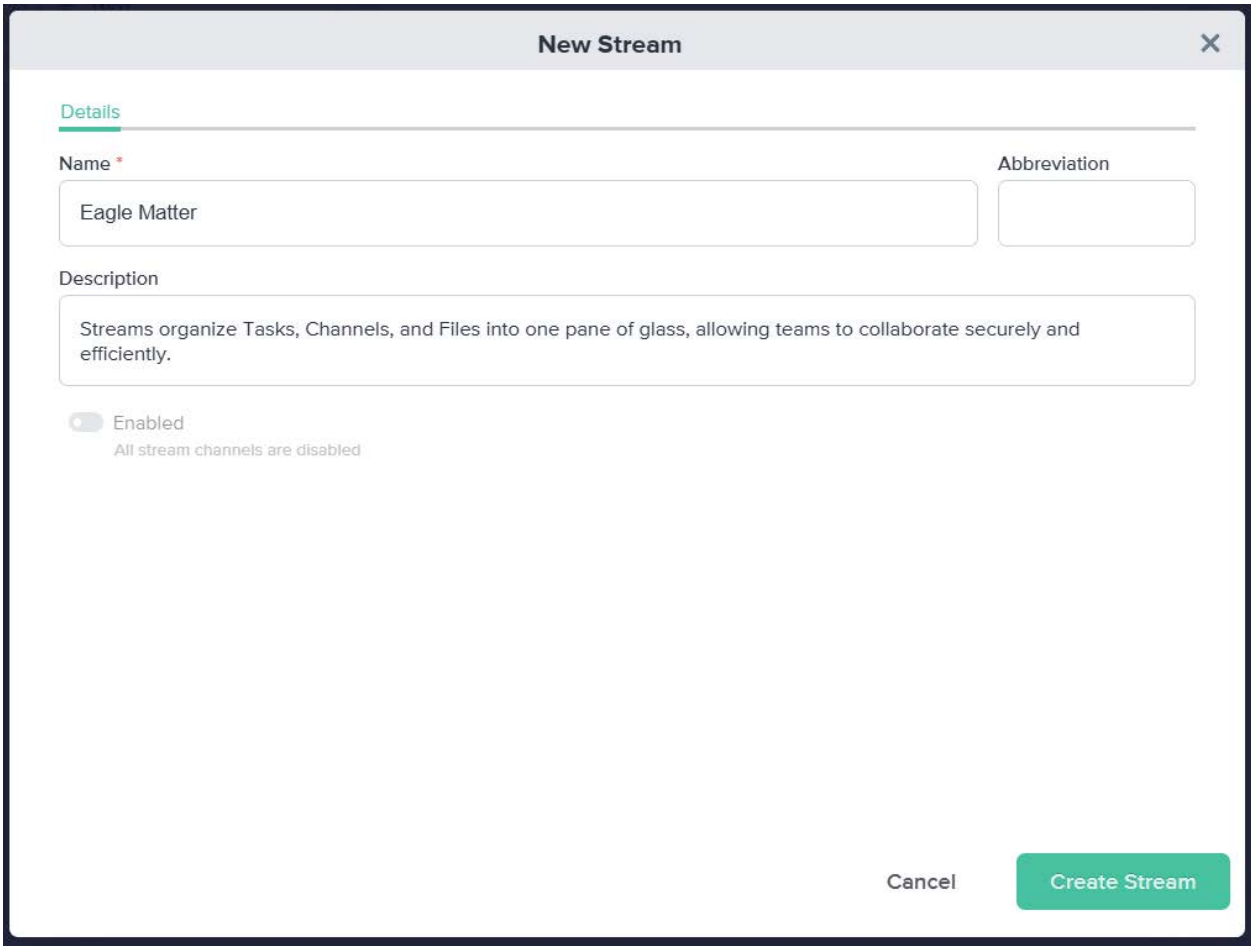
Creating a Stream

Only a Global Streams Admin, who is appointed by a Company Admin, can create new Streams. The Global Streams Admin who creates a Stream is by default the Stream Admin. To create a Stream:

1. Click on the *Streams* icon in the left sidebar.
2. Click **+Add** > **New Stream**.



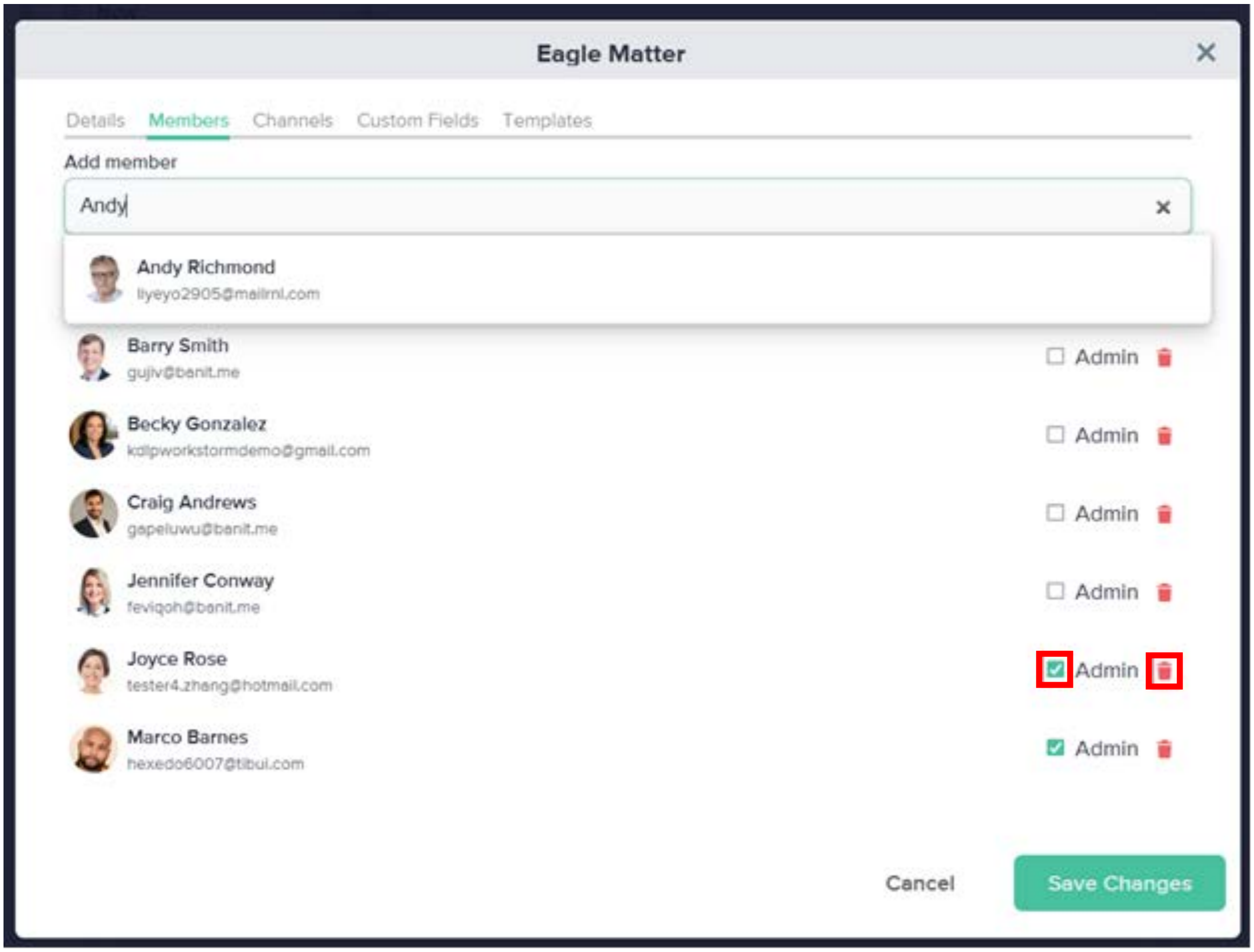
3. In the *New Stream* pop-up window, give the Stream a name and a brief description. An abbreviation will be created automatically, but this can be customized as well.
4. Click **Create Stream**.



Adding Members

Once the Stream is created, a new set of tabs will open in the pop-up window. In the Members tab, add members to your Stream and manage their permissions:

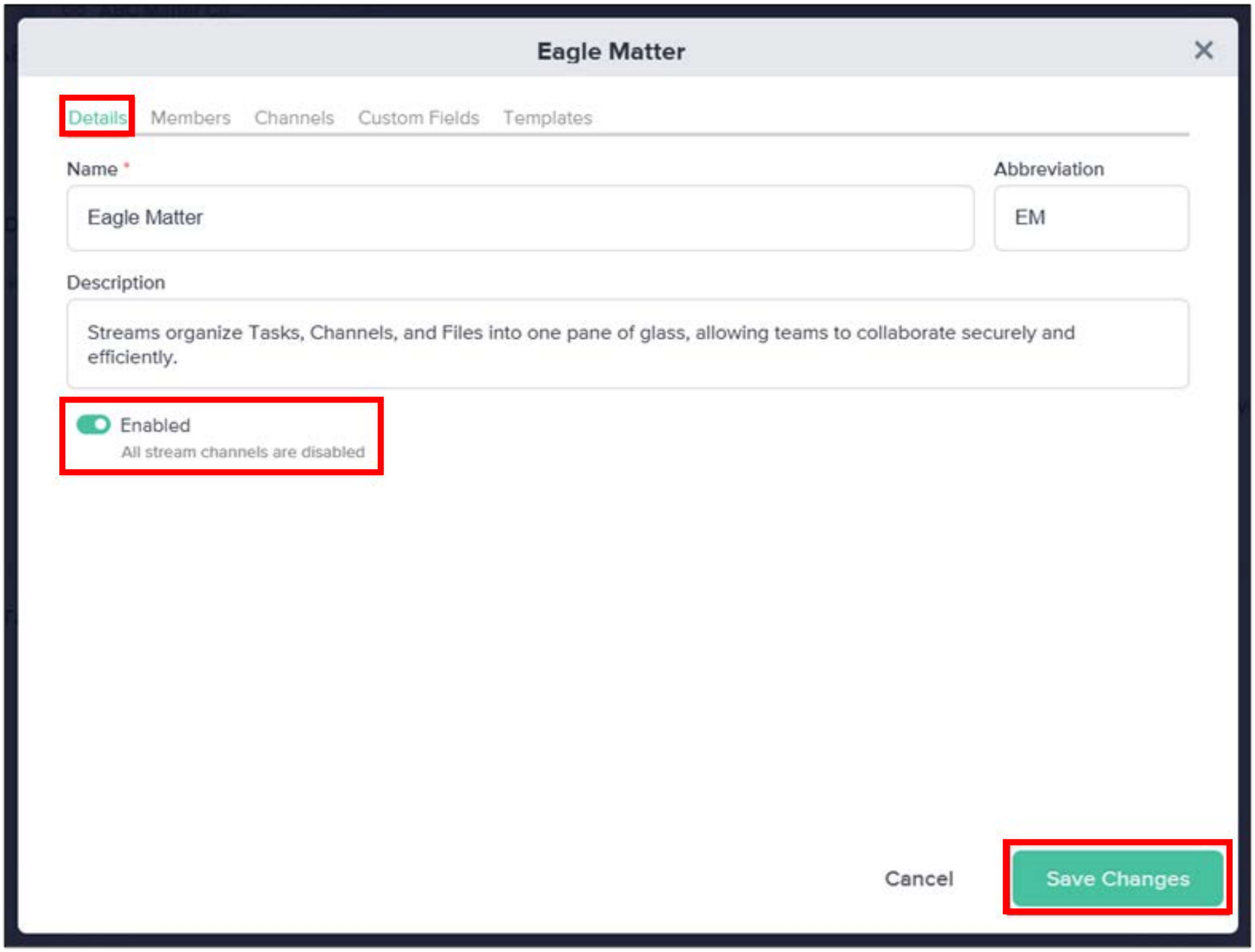
1. Search for the user's name or email and select the matching result.
2. To appoint members as Stream Admins, check the **Admin** box to the right of their name. Doing so will allow the user to complete the actions described in the following sections. To remove a member, click the **Trash** icon.
3. Click **Save Changes**.



Enabling a Stream

After their creation, Streams are disabled to ensure that Stream Admins can set up the proper member permissions and Channel structure. Before a Stream or Stream Channel can be accessed by members, it must first be enabled by a Stream Admin:

1. In the *Details* tab, click on the **Enabled toggle**.



2. Click **Save Changes**, close the pop-up, and open the Stream.

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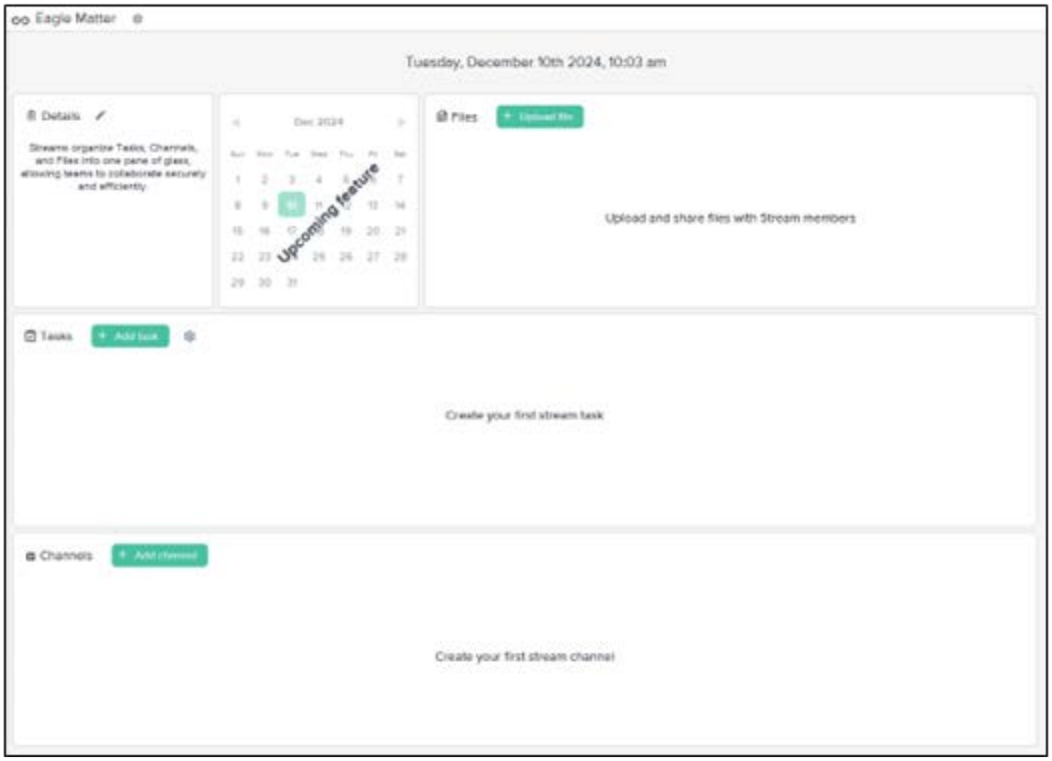
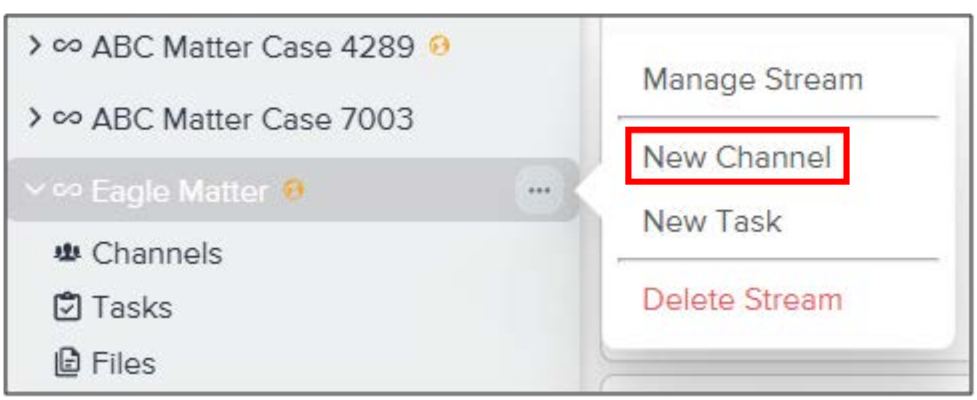


Only Stream Admins can create new Stream Channels. Additionally, only a Stream Admin can appoint, or be appointed as, a Stream Channel Admin. The Stream Admin who creates a Channel is by default the Channel Admin.

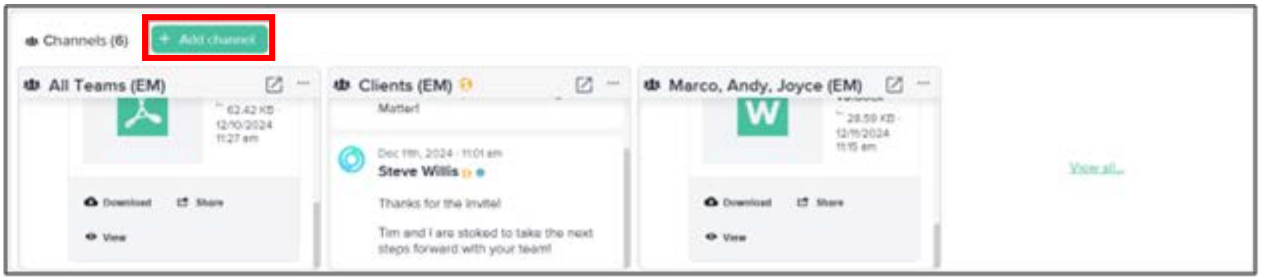
Single Channel

There are several different places a Stream Admin can quickly create a Channel:

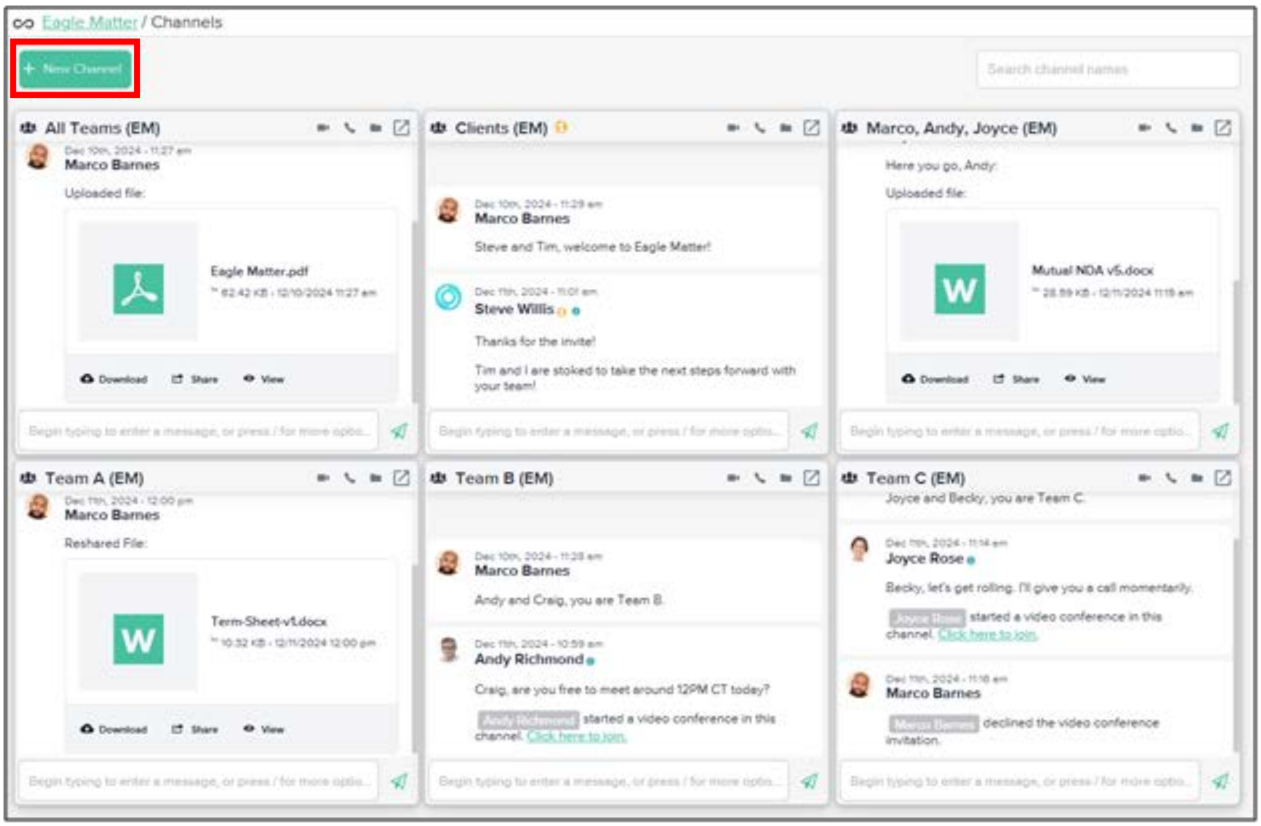
- **Streams Sidebar:** Click the ellipsis to the right of the Stream name to quickly create a Stream Channel from anywhere in the platform.



- **Channels Panel:** Click the **+Add Channel** button to quickly create a new Channel, straight from the Channels panel.



- **Channels Dashboard:** Click the **+New Channel** button to quickly create a new Channel, straight from the Channels dashboard.

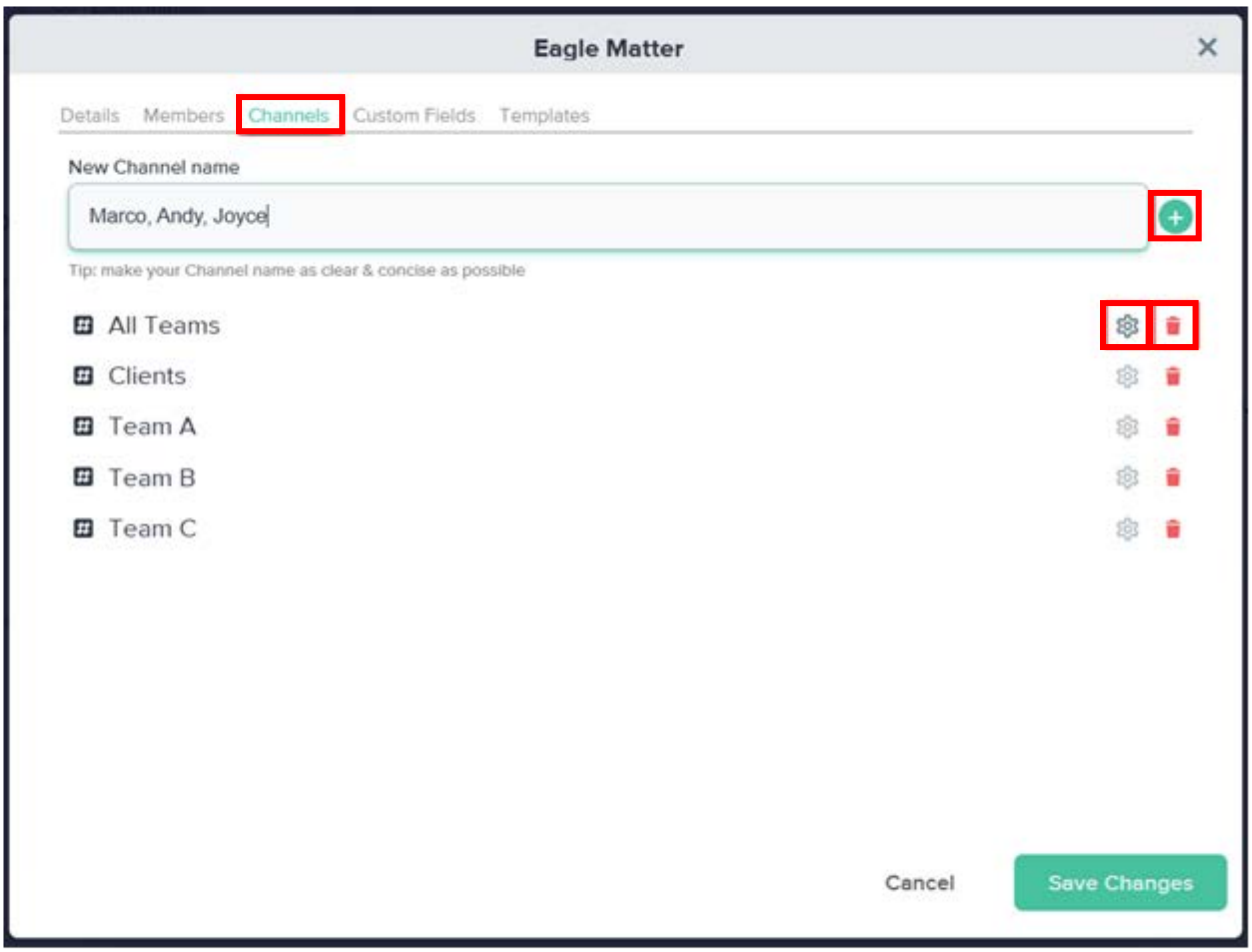


Multiple Channels

In Stream Settings, Stream Admins can rapidly generate and build out several Channels:

1. In the left sidebar, click on the **ellipsis** to the right of the Stream name and select **Manage Stream**.

2. Click on the *Channels* tab, enter the name of your Channel and click the **green plus** button to add it to the Stream.
3. When done, click **Save Changes**.



The Stream Admin who creates a Channel is automatically promoted to Channel Admin. To access Channel settings, or to add additional members to a Channel, click on the gear icon to the right of its name. To remove a Channel, select the red trash icon.

For more information on adjusting Channel settings and adding additional members, click here.

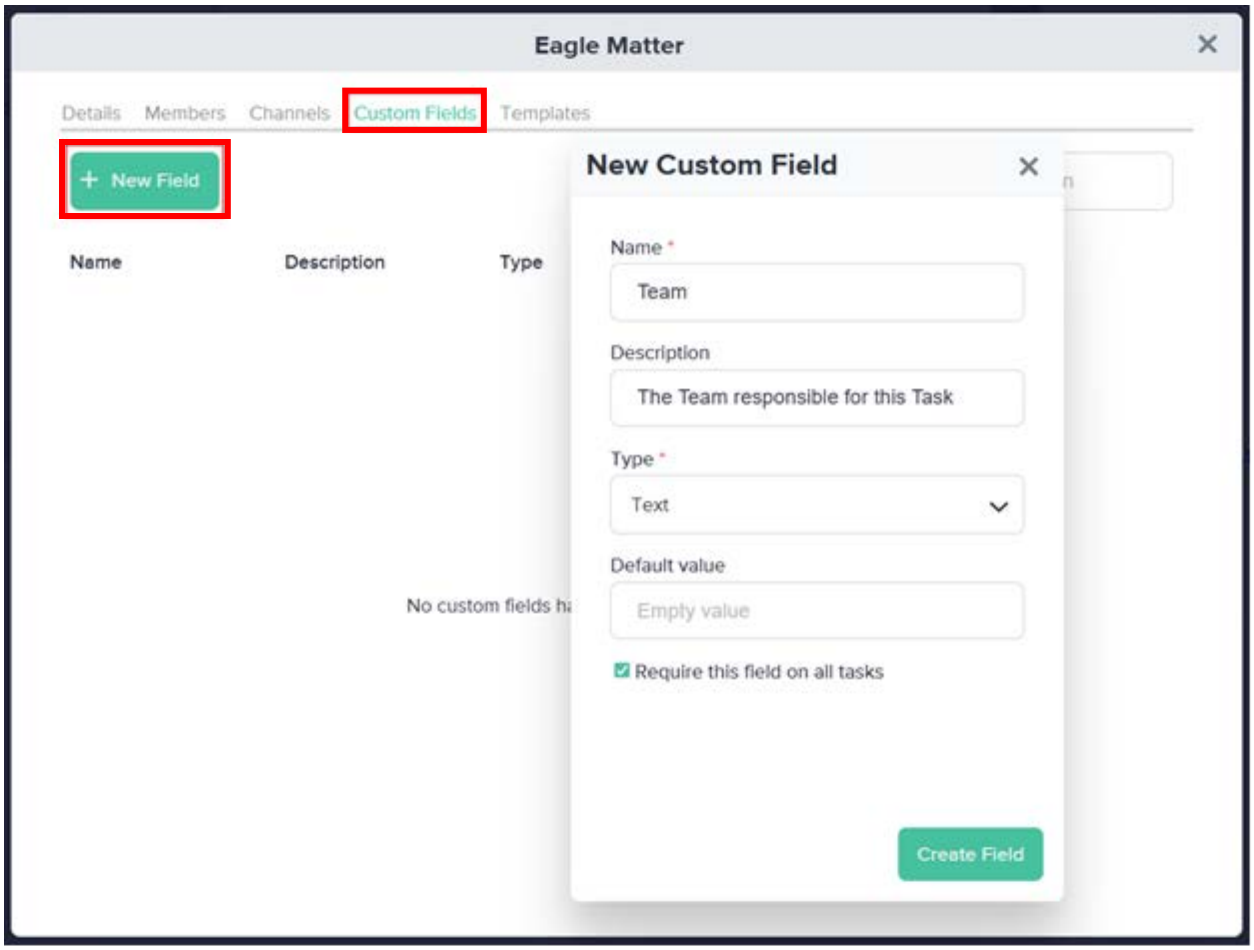
Managing Tasks

Stream Admins can view and manage all Tasks within the Stream. They can modify Task details, add or remove Assignees and Watchers, and create additional Custom Fields for use by members of the Stream.

Creating Custom Fields

Custom Fields are additional fields that can be optional or required by Stream Admins. To create a Custom Field:

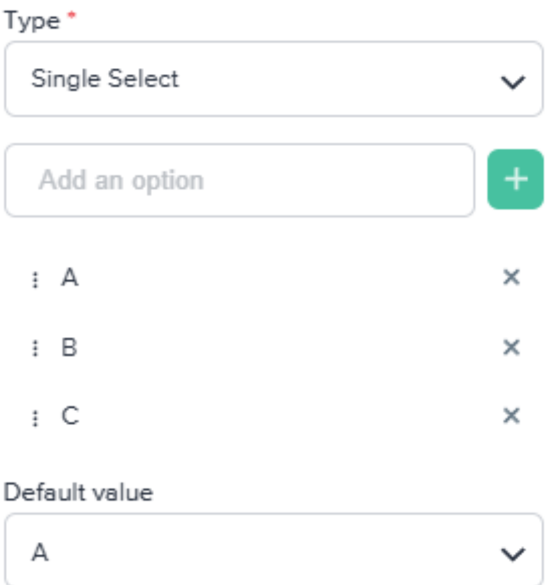
1. In the left sidebar, click on the **ellipsis** to the right of the Stream name and select **Manage Stream**.
2. In the *Custom Fields* tab, click **+New Field**.
3. In the *New Custom Field* pop-up, enter the name of the Custom Field and a brief description.



4. Under Type, choose the option that makes the most sense for this specific field:

- **Text:** A blank-slate text box for letters and integers.
- **Number:** A blank-slate text box for integers only.
- **Single Select:** Multiple-choice selection that can contain text and/or number options.

5. Input the Default Value, which automatically populates the field during Task creation.

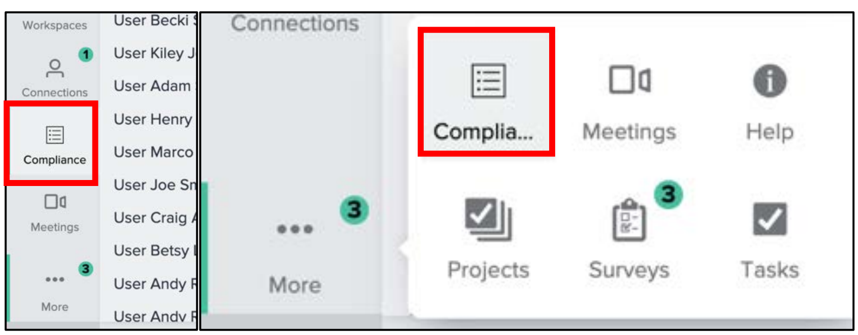


6. If the field must be filled out for every Task in the Stream, check the **Required** box.
7. Click **Create Field**.

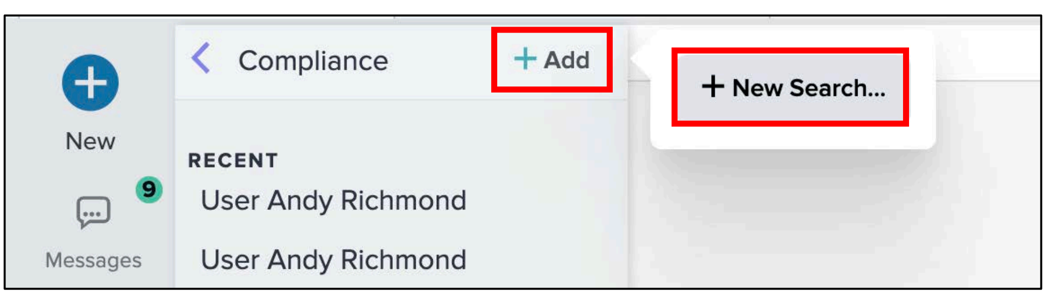
Compliance for Streams

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

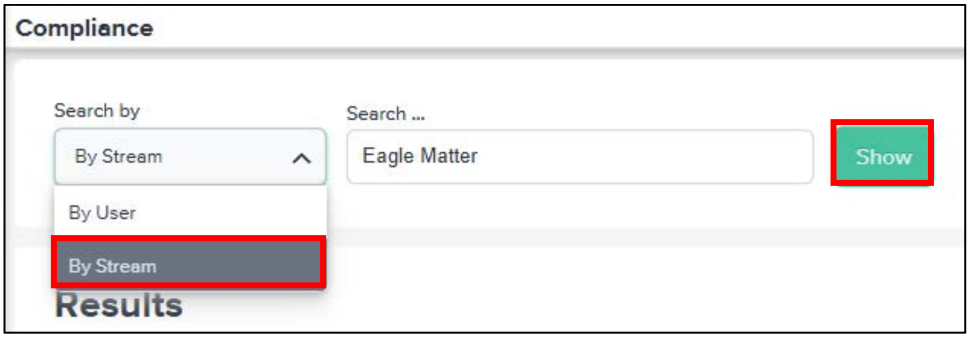
1. Click the *Compliance* icon in the left sidebar or *More* menu.



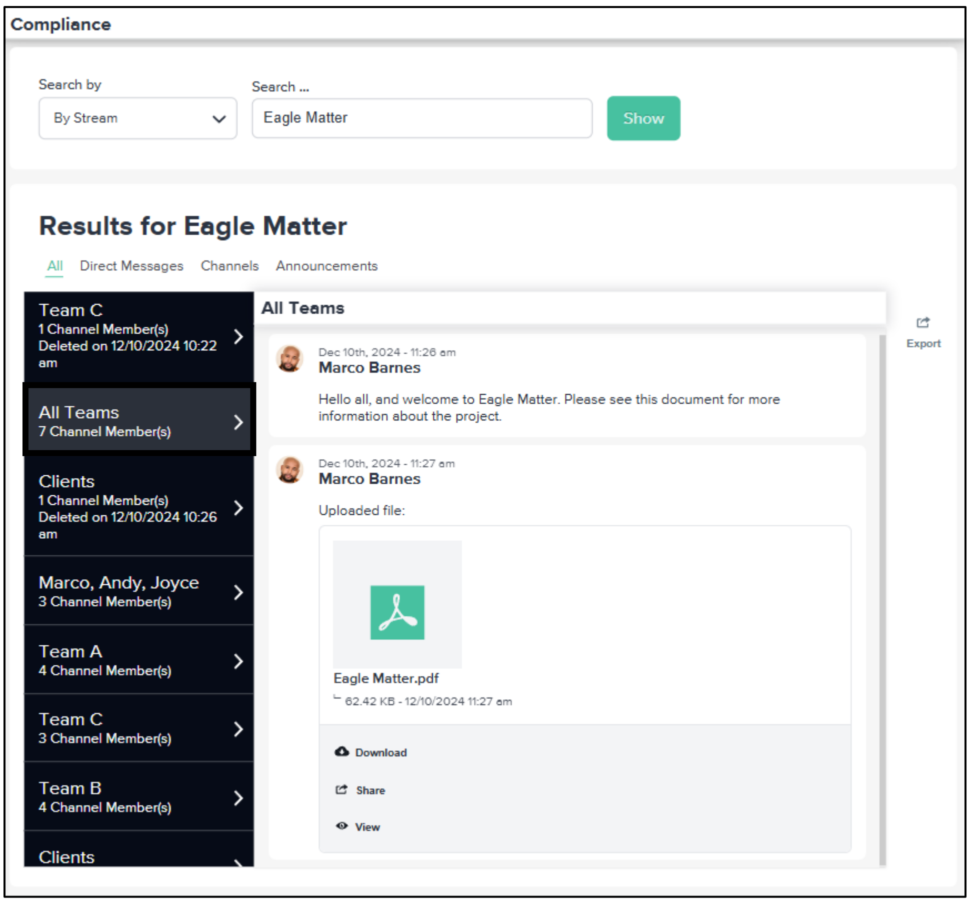
2. Click the **+Add** button at the top right of the *Compliance* menu and select **+New Search.**



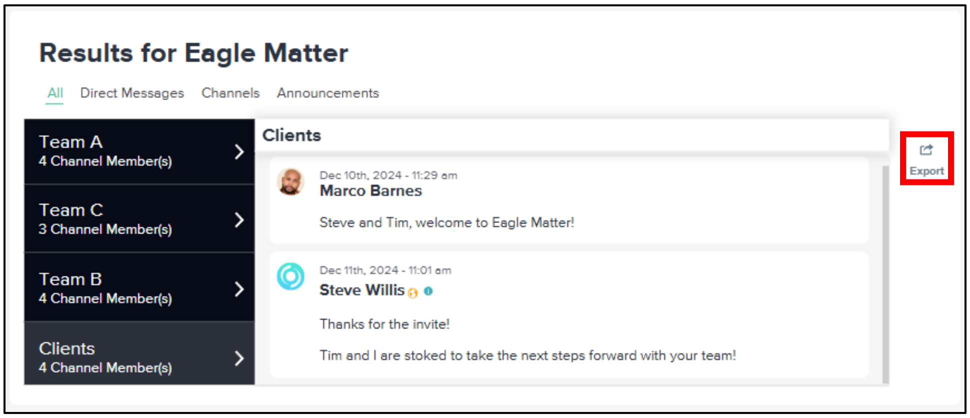
3. Click the dropdown under *Search by* and select **By Stream.**
4. Search for a Stream in the search input and select the appropriate result.
5. Click the green **Show** button to view all Channels within the Stream.



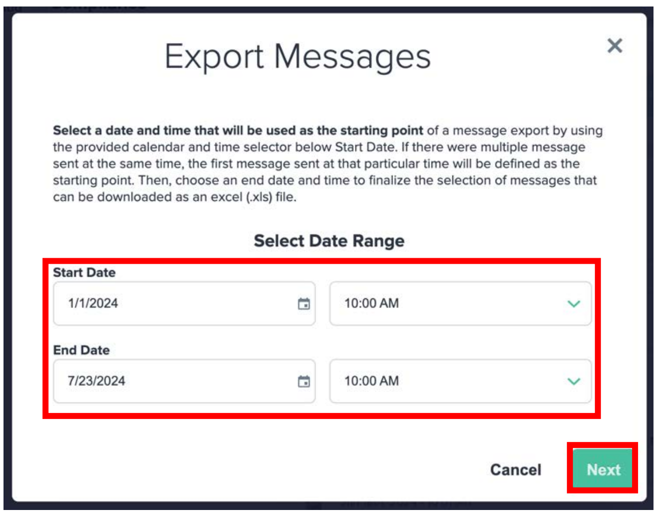
6. Select a Channel to view its data, including any deleted messages.



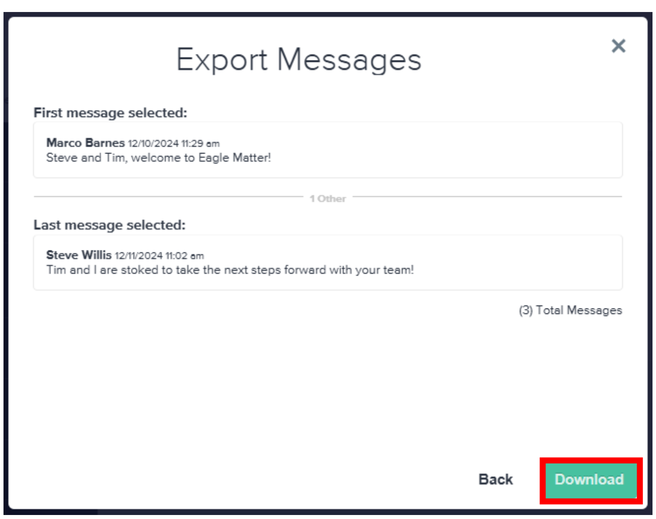
7. To download the data in an excel (.xls) file format, click **Export** on the right-side of the Compliance module.



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



9. Click **Download**.



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.