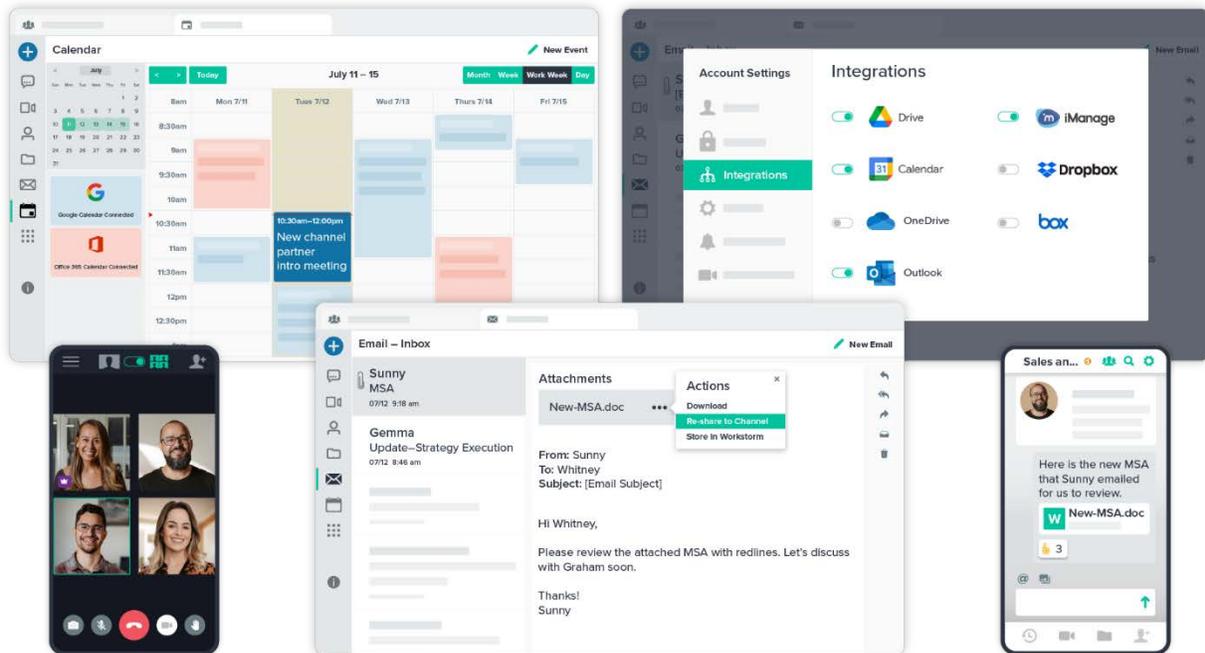


WORKSTORM

Admin Guide



Admin Guide

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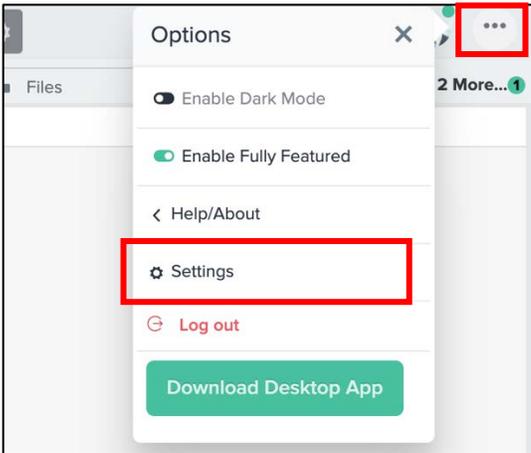
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COMPANY DETAILS

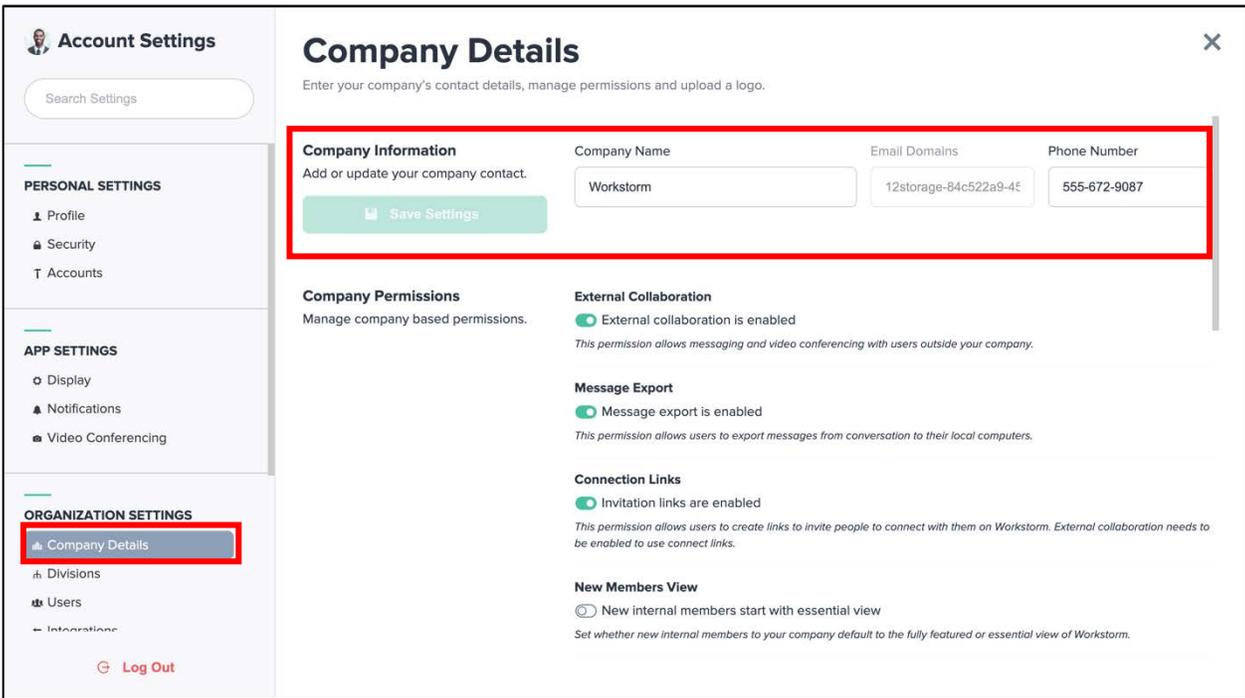
Customize your company profile, permissions, and security preferences.

Company Branding

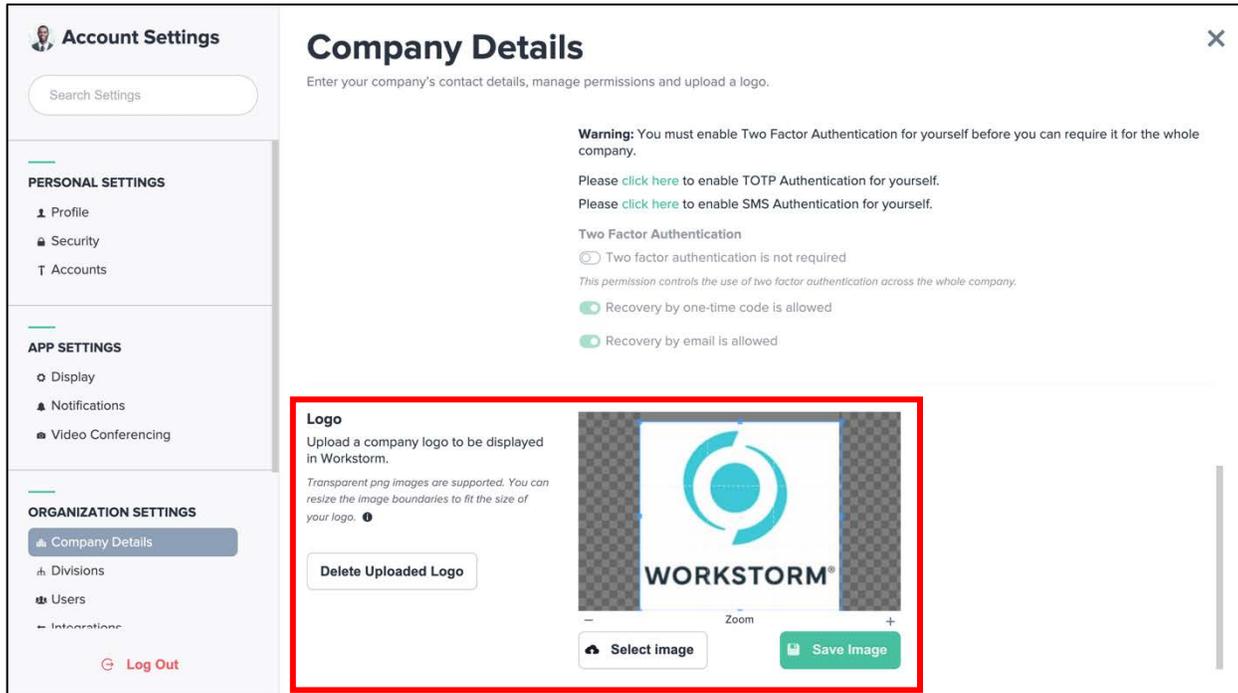
1. Go to *Settings*, and under *Organization Settings*, click **Company Details**.



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

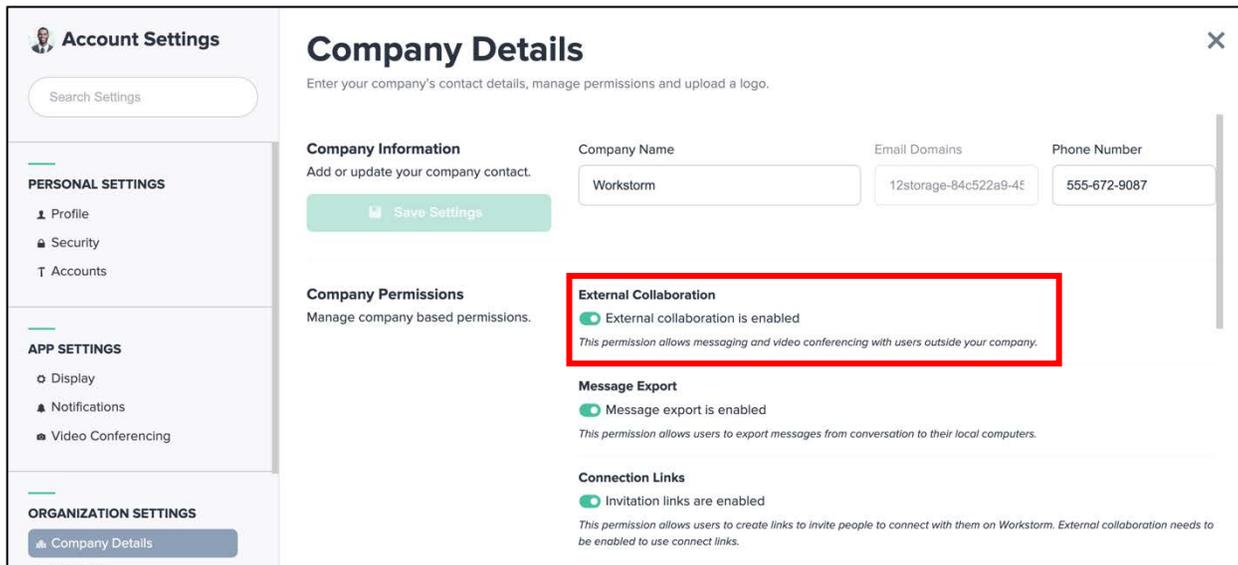


3. Upload a company logo to be displayed in the top-left corner of your Workstorm.



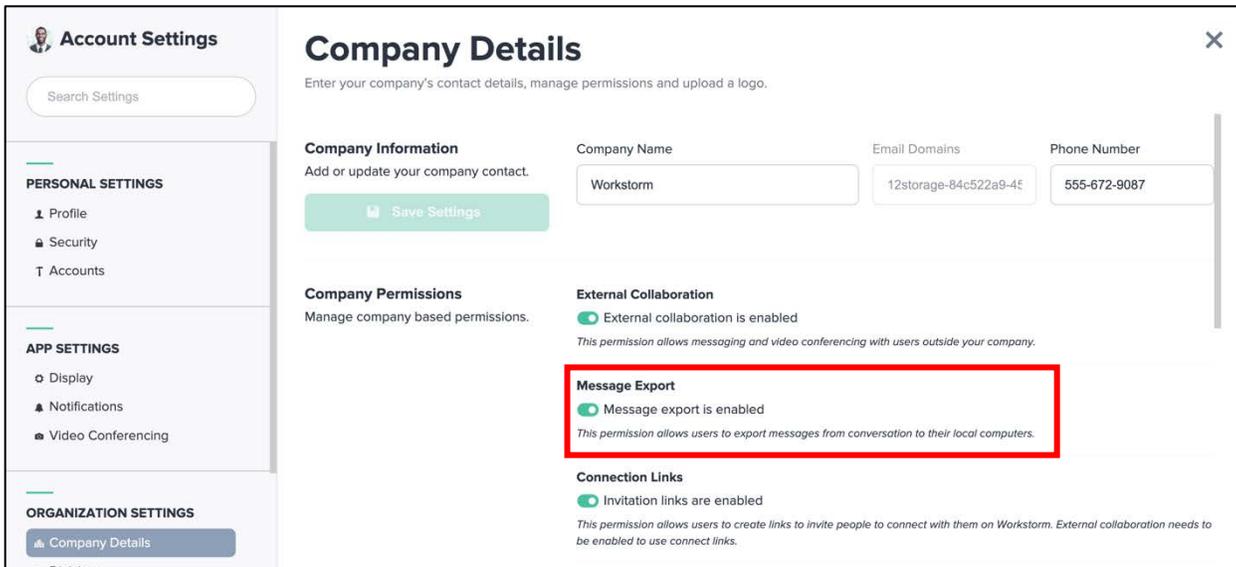
External Collaboration Settings

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.

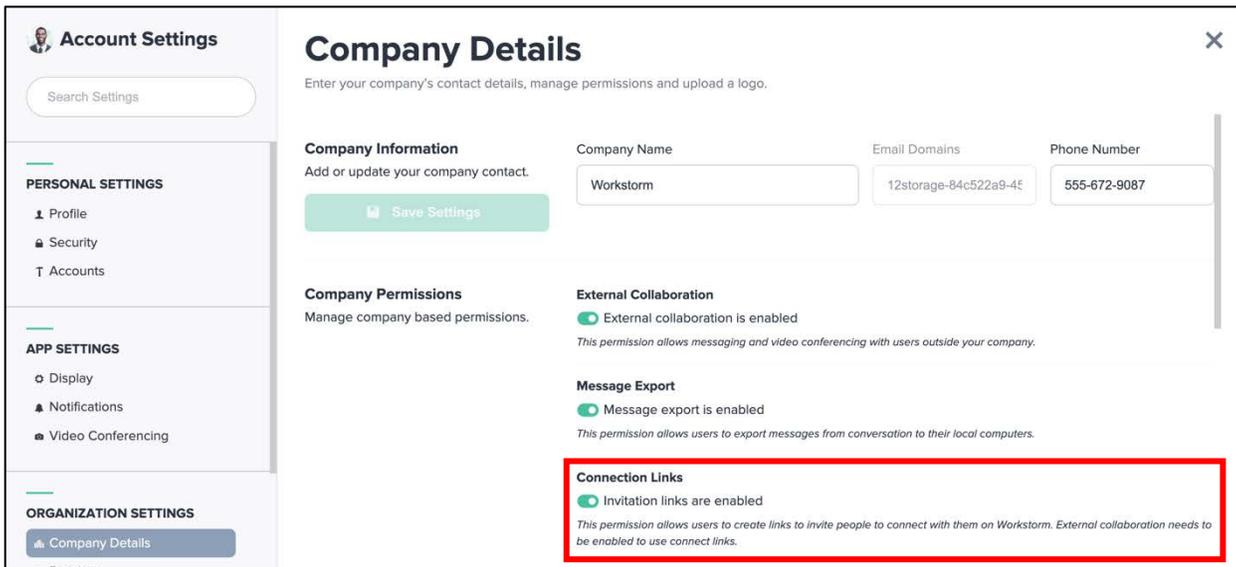


The screenshot shows the 'Company Details' section of the 'Account Settings' interface. The left sidebar contains 'PERSONAL SETTINGS' (Profile, Security, Accounts), 'APP SETTINGS' (Display, Notifications, Video Conferencing), and 'ORGANIZATION SETTINGS' (Company Details, Divisions). The main content area is titled 'Company Details' and includes a search bar and a 'Save Settings' button. It is divided into three sections: 'Company Information' (Company Name: Workstorm, Email Domains: 12storage-84c522a9-4f, Phone Number: 555-672-9087), 'Company Permissions' (External Collaboration: enabled, Message Export: enabled, Connection Links: enabled), and 'External Collaboration' (enabled). The 'Message Export' section is highlighted with a red box and contains the text: 'Message export is enabled. This permission allows users to export messages from conversation to their local computers.'

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.



The screenshot shows the 'Company Details' section of the 'Account Settings' interface, similar to the previous one. The 'Message Export' section is now disabled. The 'Connection Links' section is highlighted with a red box and contains the text: 'Invitation links are enabled. This permission allows users to create links to invite people to connect with them on Workstorm. 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*.

The screenshot shows the 'Company Details' settings page. On the left is a sidebar with 'Account Settings' and 'ORGANIZATION SETTINGS'. Under 'ORGANIZATION SETTINGS', 'Company Details' is selected. The main content area is titled 'Company Details' and includes a search bar, a description, and several sections: 'Connection Links', 'New Members View', 'Password Expiration Policy', 'Session Timeouts', and 'Desktop/Mobile Timeout Settings'. The 'New Members View' section is highlighted with a red box and contains a toggle switch that is turned on, with the text 'New internal members start with fully featured view' and a sub-description below it.

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.

This screenshot shows the same 'Company Details' settings page, but the 'Password Expiration Policy' section is highlighted with a red box. The 'Days' input field now contains the number '100' and has a green checkmark next to it, indicating it is a valid input. The 'Set' button is also visible next to the input field.

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.

Session Timeouts
After being inactive for this number of hours, a user will be required to re-login

Use Custom Timeouts

Desktop Timeout Settings
Timeout Duration: Time Formatting:

Mobile Timeout Settings
Timeout Duration: Time Formatting:

Desktop and Mobile use the same logout duration

[Save Timeout Settings](#)

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).

Warning: You must enable Two Factor Authentication for yourself before you can require it for the whole company.
Please [click here](#) to enable TOTP Authentication for yourself.
Please [click here](#) to enable SMS Authentication for yourself.

Two Factor Authentication
 Two factor authentication is not required
This permission controls the use of two factor authentication across the whole company.

Recovery by one-time code is allowed
 Recovery by email is allowed

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

[Save Timeout Settings](#)

Two Factor Authentication
 Two factor authentication is required
This permission controls the use of two factor authentication across the whole company.

Recovery by one-time code is allowed
 Recovery by email is allowed

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.

The screenshot displays the 'Users' management page in the Workstorm application. On the left, the 'Organization Settings' menu has 'Users' selected. The main content area features a '+ New User' button, an 'Upload CSV File' button, and a 'Download Template' button. A modal window is open for adding a new user, with fields for 'Email address (required)', 'First name (required)', and 'Last name (required)', all of which are filled and marked with green checkmarks. The 'Send Invite' button is highlighted in green. Below the modal, a list of existing users is visible, including 'John Doe' (Pending), 'AA' (Blocked), and 'Tester Account' (Blocked).

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*.

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 -- Search Users

There are 39 users
Full Members x Admin x

	Name	User Status
<input type="checkbox"/>	Craig Andrews gapeluwu@banit.me	Full Member
<input type="checkbox"/>	Marco Barnes hexedo6007@tibui.com	Full Member
<input type="checkbox"/>	Andrew Christensen andrewscoutahead@gmail.com	Full Member
<input type="checkbox"/>	Jennifer Conway feviqoh@banit.me	Full Member
<input type="checkbox"/>	Pam Davis testing12345@12storage.com	Full Member

Filters

User Status

- Full Members
- Invited
- Pending
- External
- Blocked
- Admin
- Compliance Moderators
- Global Streams Admins

Multi Factor Authentication

- Any MFA
- TOTP MFA
- SMS MFA
- Reset requested
- No MFA

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.

Select All -- Action -- Search Users Filter

There are 39 users
Full Members x Admin x

Craig Andrews
gapeluwu@banit.me

User Status: Full Member

Joined: March 15, 2019
TOTP Auth: No
SMS Auth: No

User Permissions

Admin Compliance Global Streams Admin

Block Craig

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*.

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 -- Search Users

There are 1 users

Any MFA

WORKSTORM TEST			User Status
user3@buzzcol.com			Full Member
Joined	TOTP Auth	SMS Auth	
August 30, 2022	No	Yes	

User Permissions

Admin Compliance Global Streams Admin

Filters

User Status

- Full Members
- Invited
- Pending
- External
- Blocked
- Admin
- Compliance Moderators
- Global Streams Admins

Multi Factor Authentication

- Any MFA
- TOTP MFA
- SMS MFA
- Reset requested
- No MFA

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

NOTE: Only Company Admins can reset 2FA.

Joyce Rose
tester4.zhang@hotmail.com

User Status: Full Member

Joined	TOTP Auth	SMS Auth
December 12, 2016	No	No

User Permissions

Admin Compliance Global Streams Admin

[Reset MFA](#) [Clear Reset MFA](#) [Block Joyce](#)

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.

The screenshot displays the 'Account Settings' interface. On the left sidebar, under 'ORGANIZATION SETTINGS', the 'Divisions' option is highlighted with a red box. The main content area is titled 'Divisions' and includes a '+ New Division' button in the top right corner, also highlighted in red. Below this, a dropdown menu for 'Chicago Office' is expanded, showing a 'Create Division' button highlighted in red. Underneath, the 'Division Members' section lists two members: 'Marco Barnes' and 'Grace Evans'. Both members have an 'Admin' toggle and a vertical ellipsis menu icon, both of which are highlighted with red boxes.

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

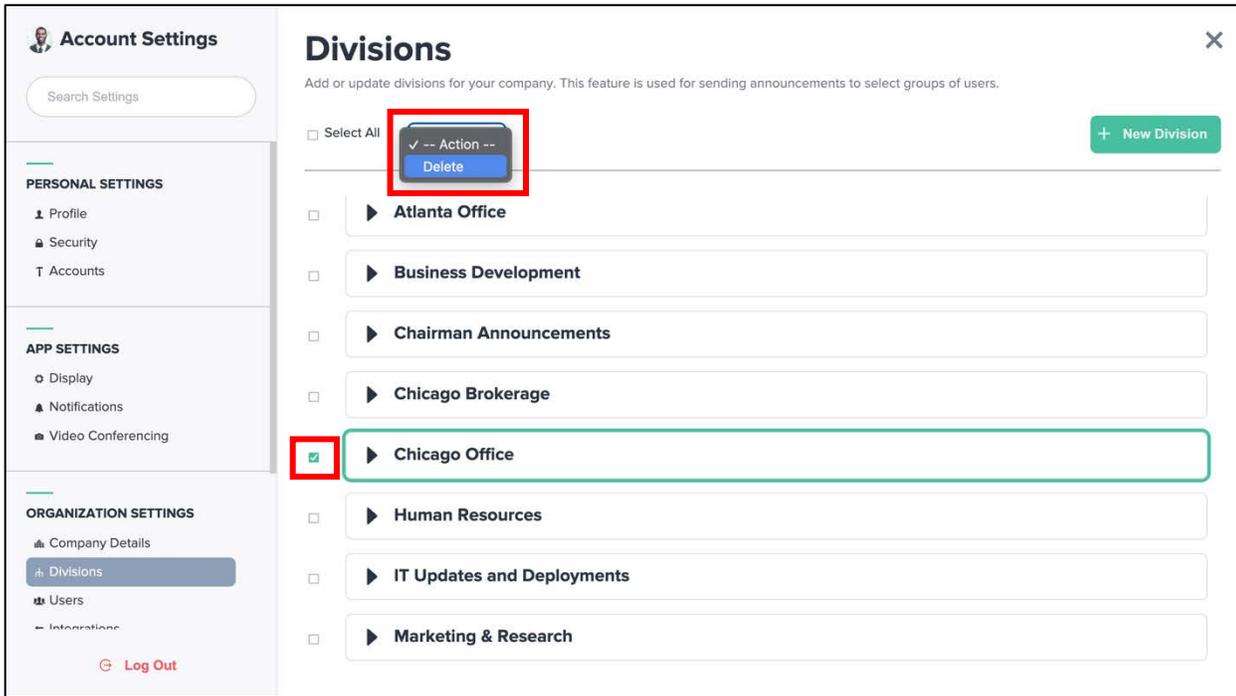
Add Member

Member name Add

Search members

- Marco Barnes**
Admin
- Grace Evans**

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**.

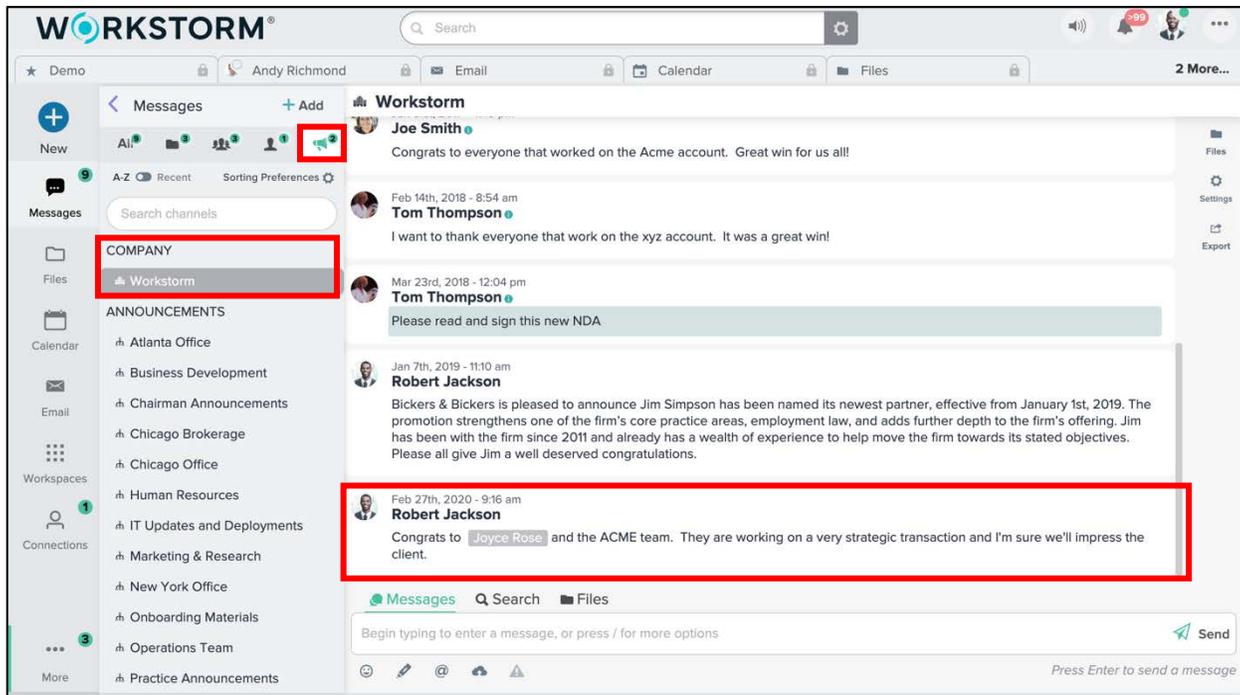


ANNOUNCEMENTS

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

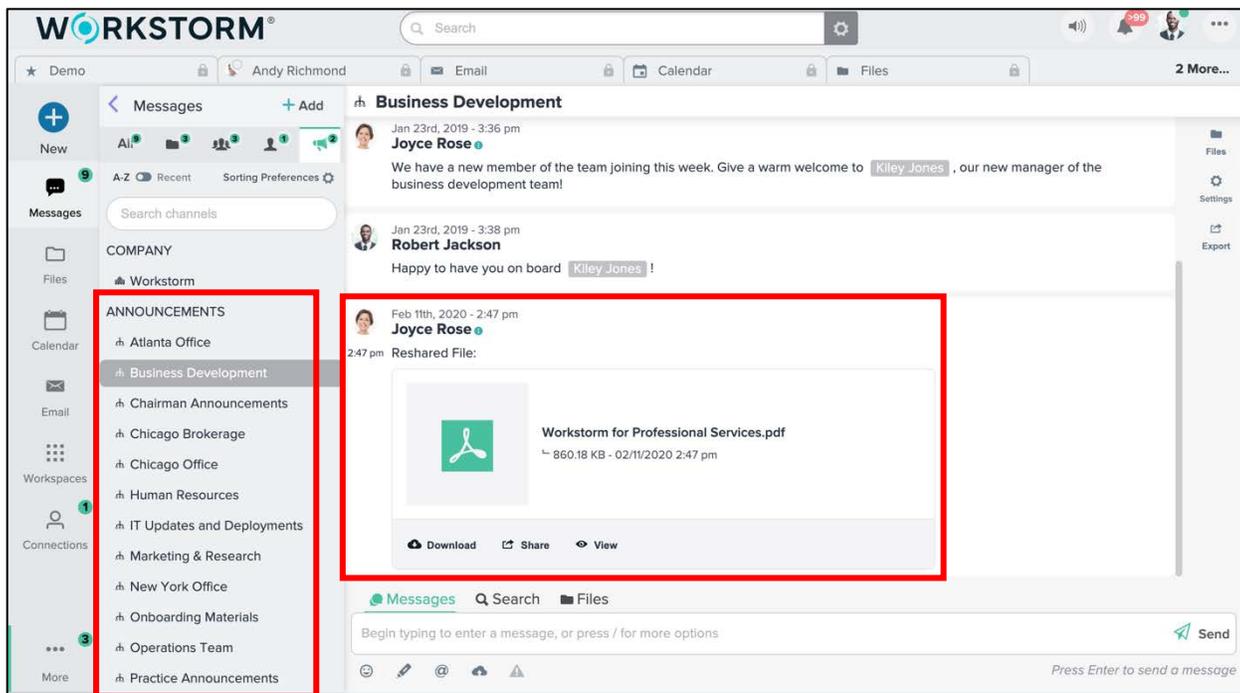
Company Announcements

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.



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**.

The screenshot displays the 'Account Settings' interface. On the left is a sidebar with a search bar and three main sections: 'PERSONAL SETTINGS' (Profile, Security, Accounts), 'APP SETTINGS' (Display, Notifications, Video Conferencing), and 'ORGANIZATION SETTINGS' (Company Details, Divisions, Users, **Integrations**, Apps, Analytics). The 'Integrations' option in the sidebar is highlighted with a red box. The main content area is titled 'Integrations' and includes a sub-header 'Add or update API integrations for your company. An API integration allows you to connect Workstorm to other applications.' Below this are tabs for 'Inbound' and 'Outbound', a 'Select All' checkbox, an action dropdown menu, and a '+ New Integration' button. A list of six integrations is shown, each with a checkbox and a right-pointing arrow:

- Business Interruption Article
INSURANCE NEWS INTEGRATION
- Gmail Integration test
GMAIL INTEGRATION
- Marketing App Integration
NEW APP CONNECTION
- Project Team XYZ
UPDATES ON XYZ ACCOUNT
- Signed Agreement Zap
SIGNED AGREEMENT ZAP
- Zap For Contracts
ZAPIER INTEGRATION FOR ESIGNATURE VIA RIGHTSIGNATURE
- Zapier Integration XYZ
AN INTEGRATION TO PULL IN A TWITTER FEED.

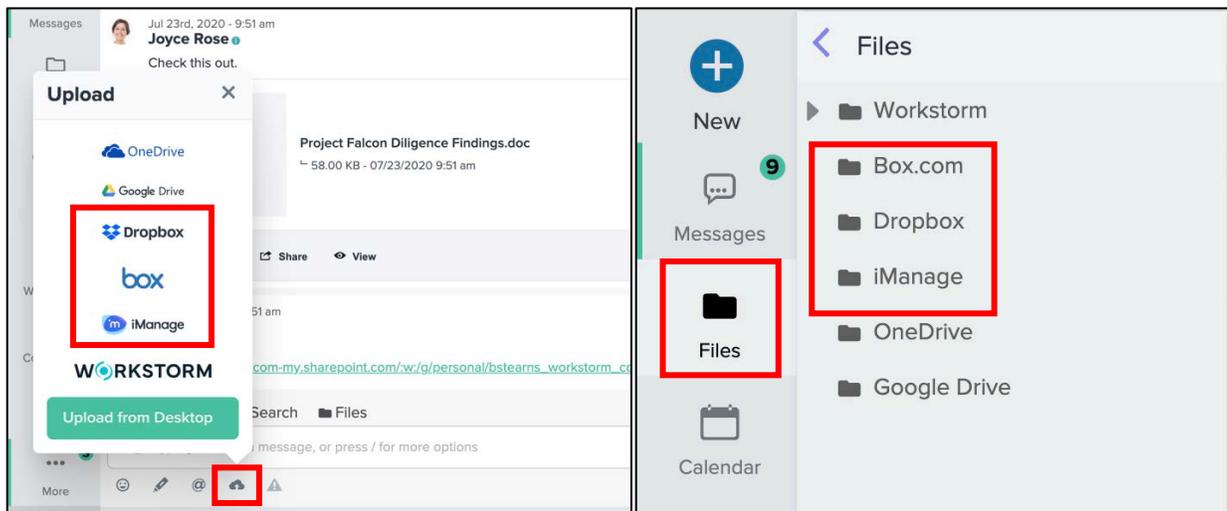
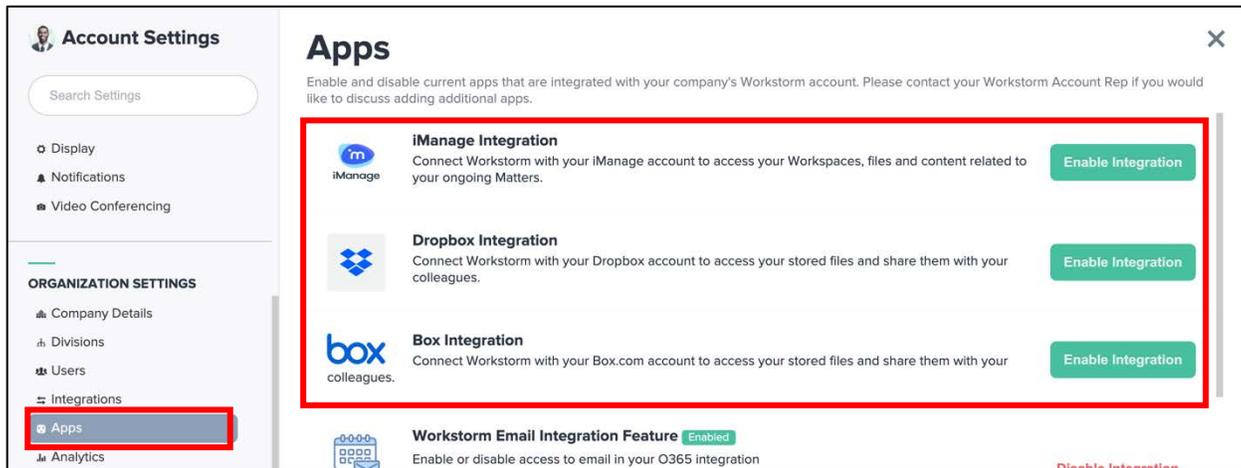
APPS

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

Document Management Systems (DMS)

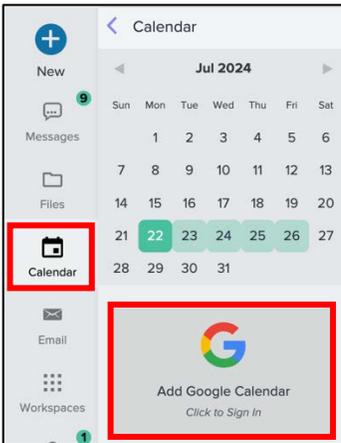
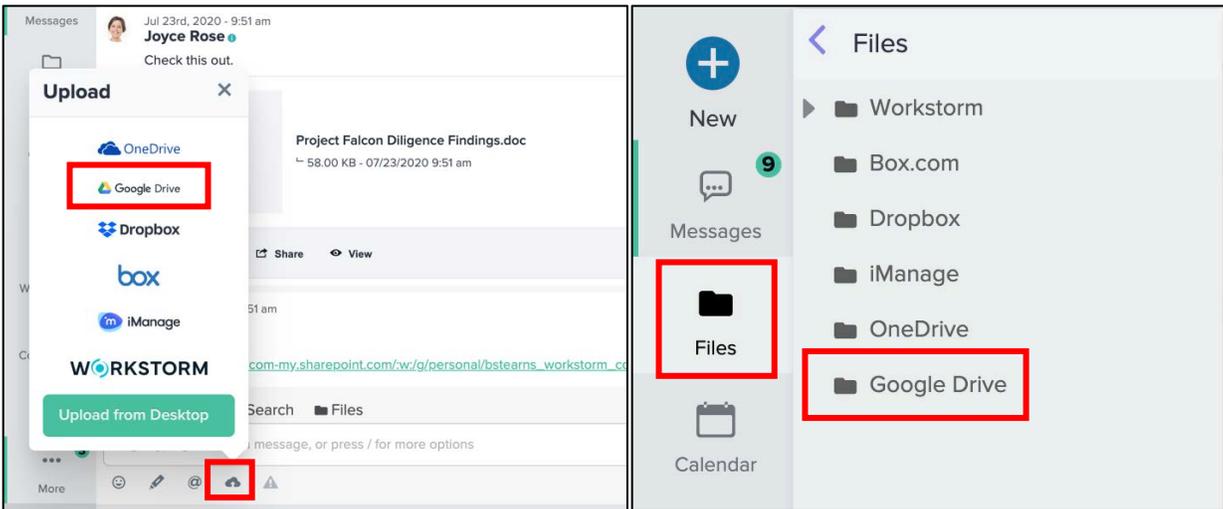
To manage your apps, go to *Settings*, and under *Organization Settings*, click **Apps**.

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.



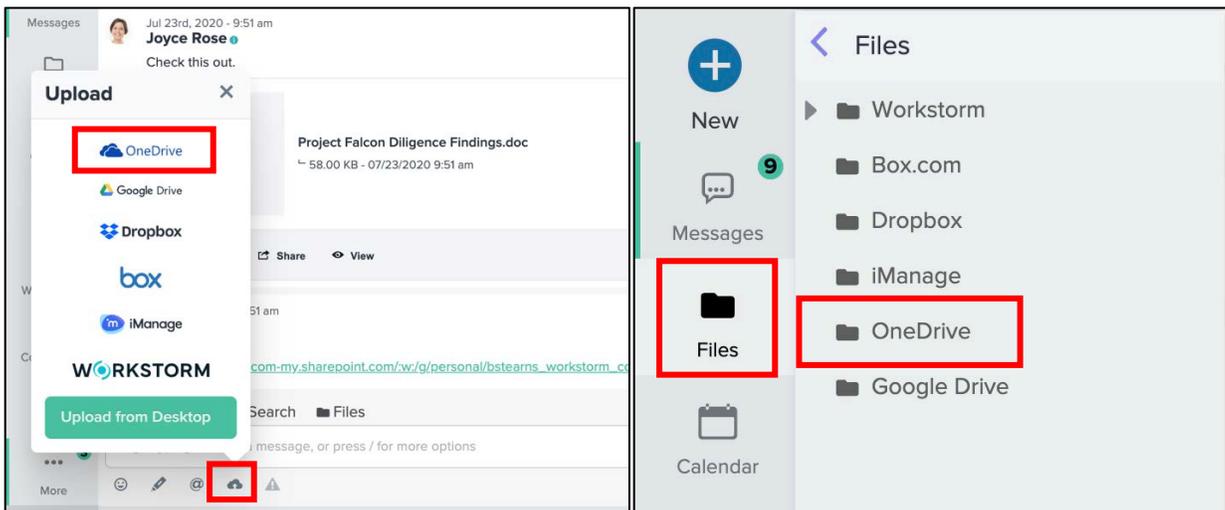
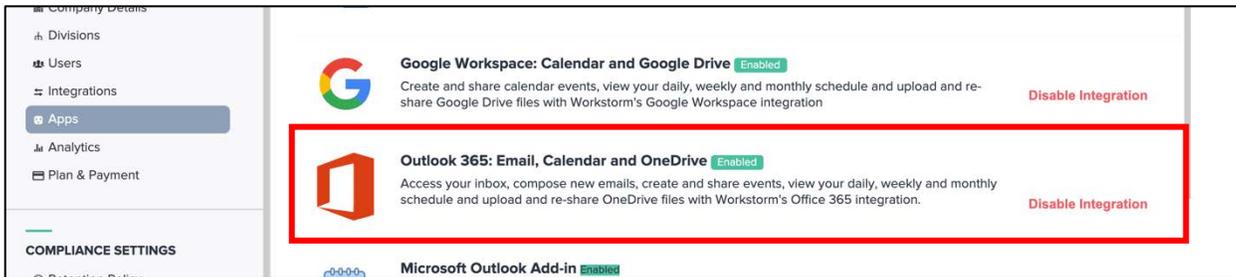
Google Workspace

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



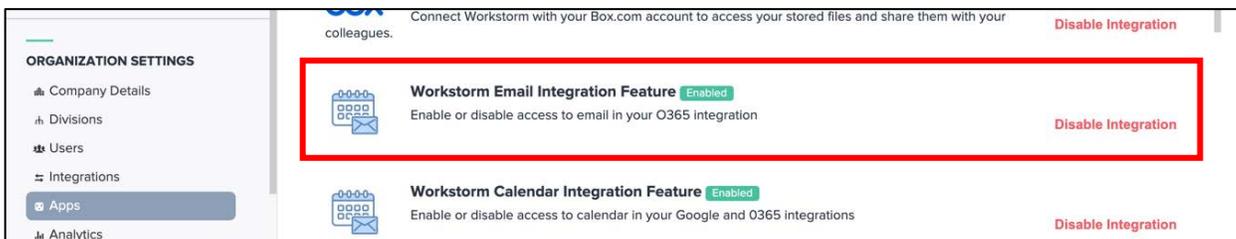
Office 365

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



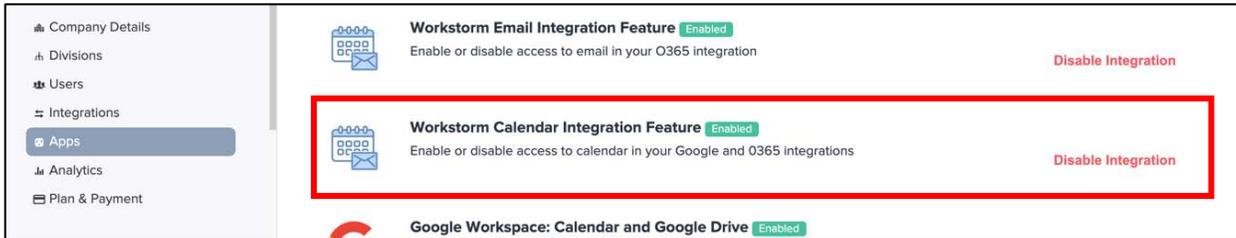
Customize Email

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.



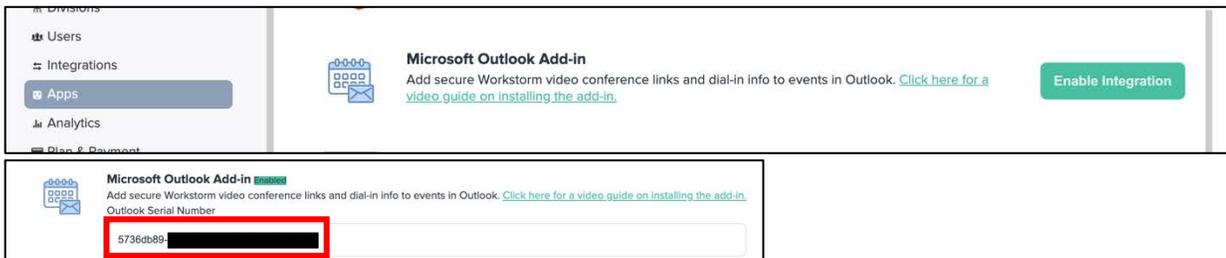
Customize Calendar

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.



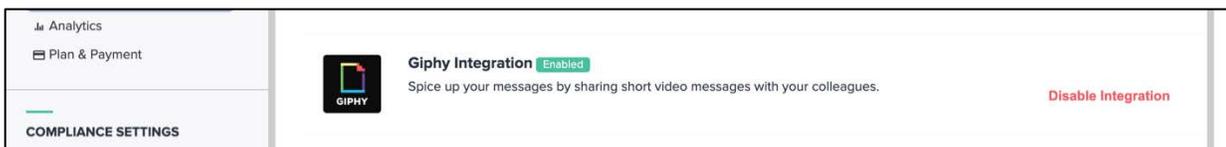
Outlook Add-in

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 Conference* 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.



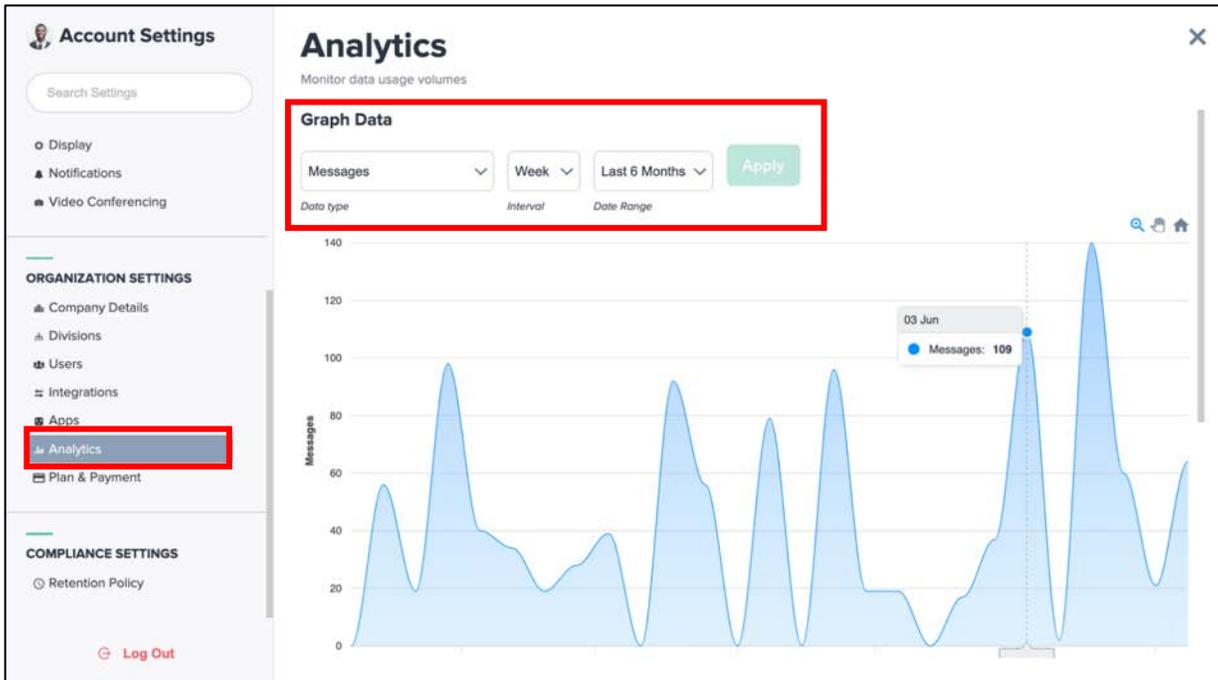
Giphys

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.

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.

Select All

There are 1 users

<input type="checkbox"/>	<input type="button" value="v"/>	Andy Richmond liyeyo2905@mailrnl.com	User Status Full Member
Joined	TOTP Auth	SMS Auth	
June 25, 2020	No	No	
User Permissions			
<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> Compliance	<input type="checkbox"/> Global Streams Admin	
<input type="button" value="Block Andy"/>			

Completing an Audit

Only compliance moderators can complete an audit.

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

Workspaces

- User Becki J
- User Kiley J
- User Adam
- User Henry
- User Marco
- User Joe Sr
- User Craig
- User Betsy
- User Andy F
- User Andy F

Connections

Compliance

Meetings

More

Streams

Tasks

Files

More

Email

Calendar

Workspaces

Compliance

Connections

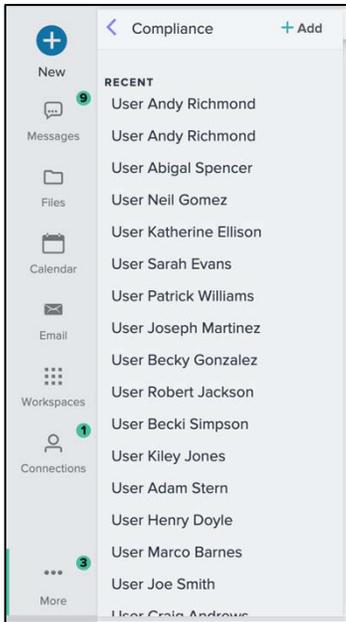
Help

Meetings

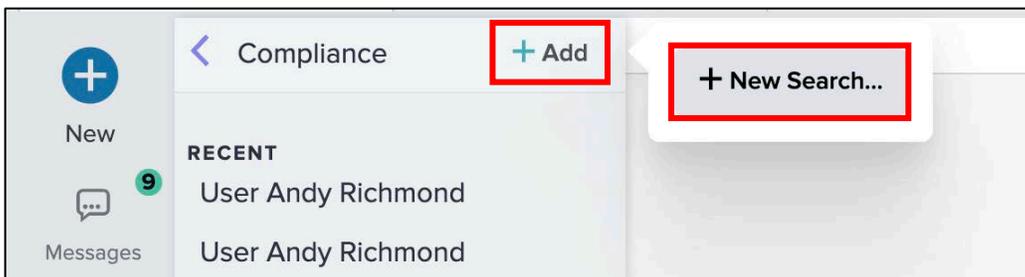
Projects

Surveys

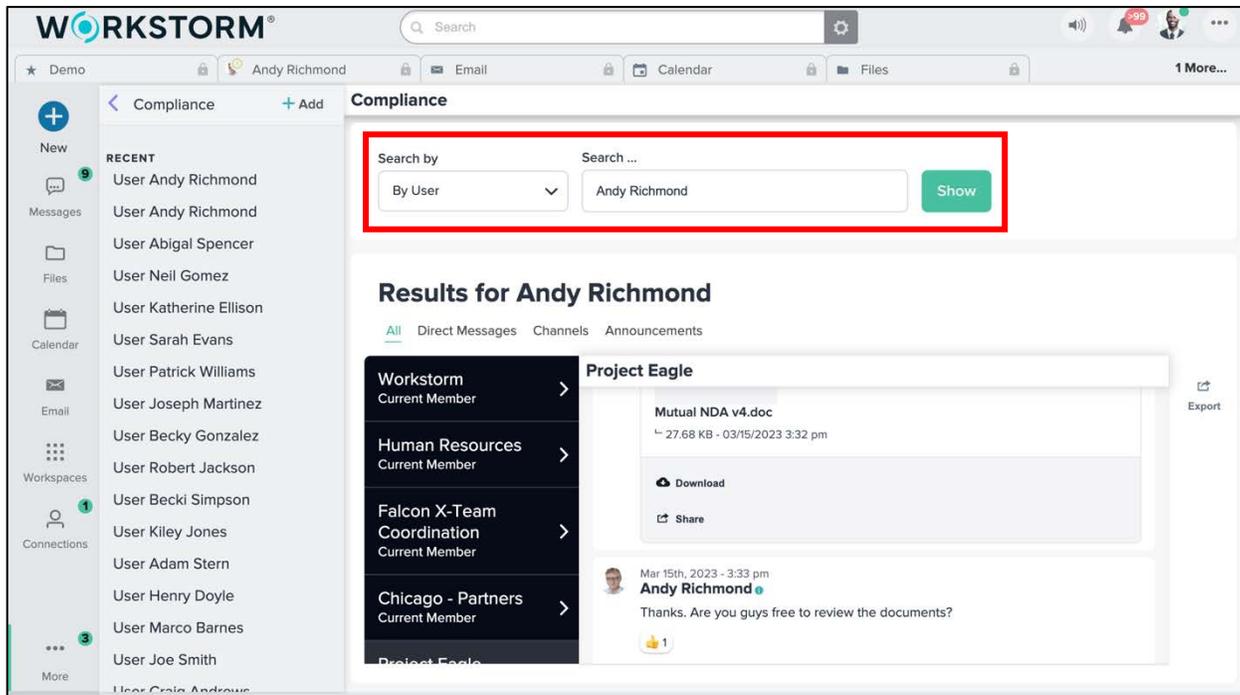
2. A history of recent compliance searches will appear in the Compliance menu.



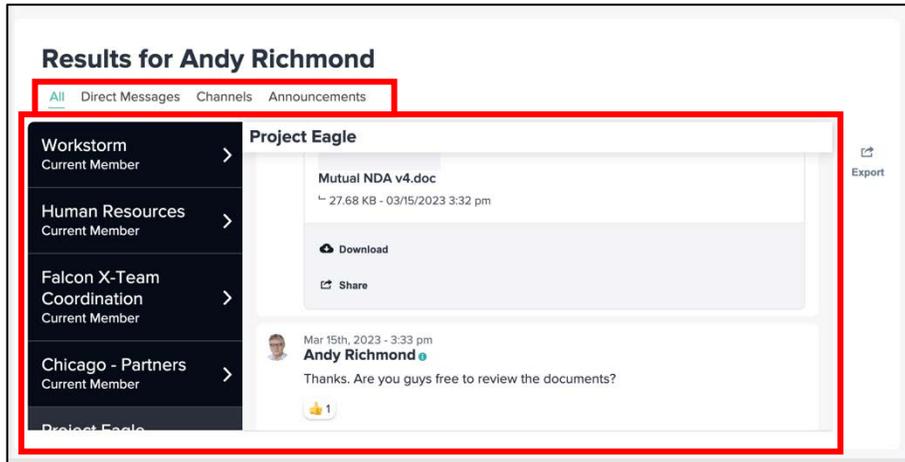
3. Click the **+Add** button at the top right of the *Compliance* menu and select **+New Search**.



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.

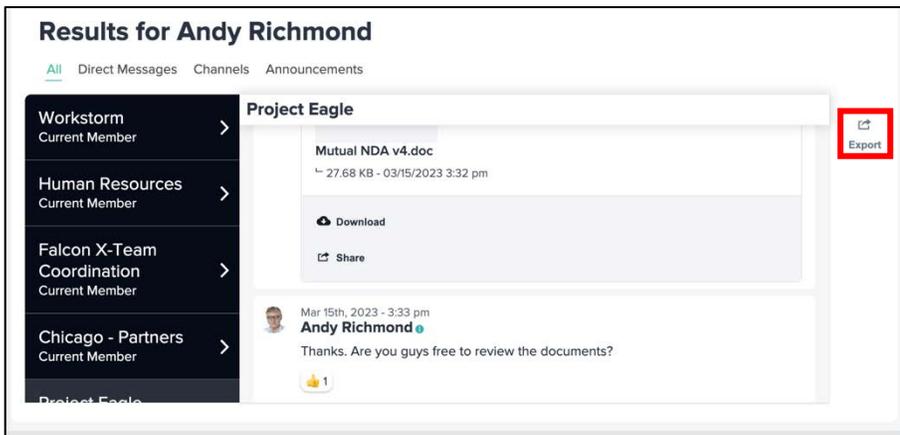


By default, the audit results for a member will show *All* conversations. Filter the results by conversation type, including *Direct Messages*, *Channels* or *Announcements*. Then, select a conversation to view its data, including any deleted messages.

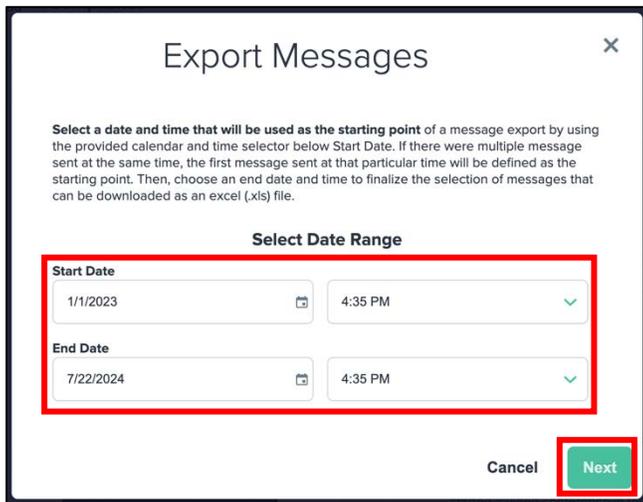


To download the data in an excel (.xls) file format:

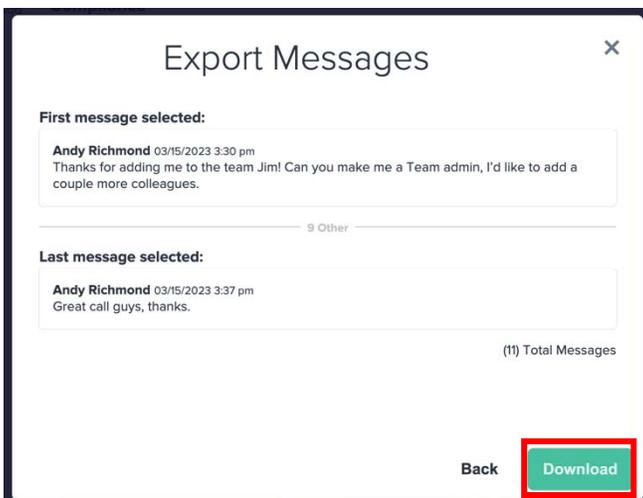
1. Click the **Export** button on the right-side of the compliance module



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.

Account Settings

Search Settings

PERSONAL SETTINGS

- Profile
- Security
- Accounts

APP SETTINGS

- Display
- Notifications
- Video Conferencing

ORGANIZATION SETTINGS

- Company Details
- Divisions
- Users
- Integrations
- Apps
- Analytics
- Plan & Payment

COMPLIANCE SETTINGS

- Retention Policy**

Retention Policy

Need to have messages expire after a set duration? Create your rules here.

Message Retention Policy ENABLED

Enable Retention Policy

Set default retention days for entire company

Leadership Announcements: 0 Days
Channels: 0 Days
DMs: 0 Days

Company and Division Message Expiration Duration | Channel Message Expiration Duration | DM Expiration Duration

Revert | Remove | **Apply Policy**

Set policies for streams, DMs, channels, or divisions

Search all conversations and streams

Search for a stream, channel, DM, or person

Set Message Expiration: Days to retain: Days
Policy Type: Legal Hold

Clear | **Add Policy**

Existing Policies

Filter Retention Policies

Filter by Conversation or Stream Name | Policy Type: Any | **Filter Results**

Channel/Conversation Name	Channel Type	Expiration Policy	Actions
Project Yukon	channel	100 days	🔒 ✎ 🗑️
Project ABC	channel	Legal Hold	🔒 ✎ 🗑️

[Log Out](#)

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.

Set default retention days for entire company

Leadership Announcements	Channels	DMs
<input type="text" value="100"/> Days	<input type="text" value="365"/> Days	<input type="text" value="500"/> Days
Company and Division Message Expiration Duration	Channel Message Expiration Duration	DM Expiration Duration

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.

Set default retention days for entire company

Leadership Announcements	Channels	DMs
<input type="text" value="100"/> Days	<input type="text" value="365"/> Days	<input type="text" value="0"/> Days
Company and Division Message Expiration Duration	Channel Message Expiration Duration	DM Expiration Duration

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.

Set policies for streams, DMs, channels, or divisions

Search all conversations and streams:

Set Message Expiration: Days

Policy Type: Expiration Legal Hold Expiration

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

Set policies for streams, DMs, channels, or divisions

Search all conversations and streams:

Set Message Expiration: Days

Policy Type: Expiration

Clear Add Policy

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.

Retention Policy
Need to have messages expire after a set duration? Create your rules here.

Message Retention Policy ENABLED

Enable Retention Policy

Set default retention days for entire company

Leadership Announcements: 0 Days
Channels: 0 Days
DMs: 0 Days

Set policies for streams, DMs, channels, or divisions

Search all conversations and streams: Search for a stream, channel, DM, or person
Set Message Expiration: Days to retain: Days
Policy Type: Legal Hold

Existing Policies

Filter Retention Policies: Filter by Conversation or Stream Name
Policy Type: Any

Channel/Conversation Name	Channel Type	Expiration Policy	Actions
Project Yukon	channel	100 days	  
Project ABC	channel	Legal Hold	  

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).

Existing Policies

Filter Retention Policies: Filter by Conversation or Stream Name
Policy Type: Any

Channel/Conversation Name	Channel Type	Expiration Policy	Actions
Project Yukon	channel	100 days	  
Project ABC	channel	Legal Hold	  

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.

The screenshot shows the 'Streams' interface for 'Eagle Matter' on Wednesday, December 11th, 2024, at 12:19 pm. The interface is divided into three main sections: Files, Tasks, and Channels.

Files Section: Labeled 'Files Header' and 'Files Panel'. It shows a list of 4 files:

File Name	Size	Owner
Client-Feedback-v1.docx	10.32 KB	Steve Willis
Eagle Matter.pdf	82.42 KB	Marco Barnes
Mutual NDA v5.docx	28.89 KB	Joyce Rose
Term-Sheet-v1.docx	10.22 KB	Marco Barnes

Tasks Section: Labeled 'Tasks Header' and 'Tasks Panel'. It shows a list of 5 tasks:

Name	Priority	Status	Start date	Due date	Assignee	Owner	Team
Set up Stream for Eagle	High	Completed	Dec 10, 2024 11:00am	Dec 10, 2024 12:00pm	Marco Barnes	Marco Barnes	N/A
Draft Term Sheet	Low	In progress	Jan 06, 2025 9:00am	Jan 10, 2025 5:00pm	Andy Richmond	Marco Barnes	N/A
Deal review with client	High	In progress	Jan 13, 2025 9:00am	Jan 17, 2025 12:00pm	Joyce Rose	Andy Richmond	N/A
Regulatory approvals	High	In progress	Jan 17, 2025 12:00pm	Feb 14, 2025 12:00pm	Andy Richmond	Andy Richmond	N/A
Transaction closing	Medium	Not started	Not set	Mar 07, 2025 5:00pm	Andy Richmond	Andy Richmond	N/A

Channels Section: Labeled 'Channels Header' and 'Channels Panel'. It shows 6 channels, including 'All Teams (EM)', 'Clients (EM)', and 'Marco, Andy, Joyce (EM)'. The 'Clients (EM)' channel shows a message from Steve Willis: 'Thanks for the invite!'. The 'Marco, Andy, Joyce (EM)' channel shows an uploaded file: 'Mutual NDA v5.docx' (28.89 KB).

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**.

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

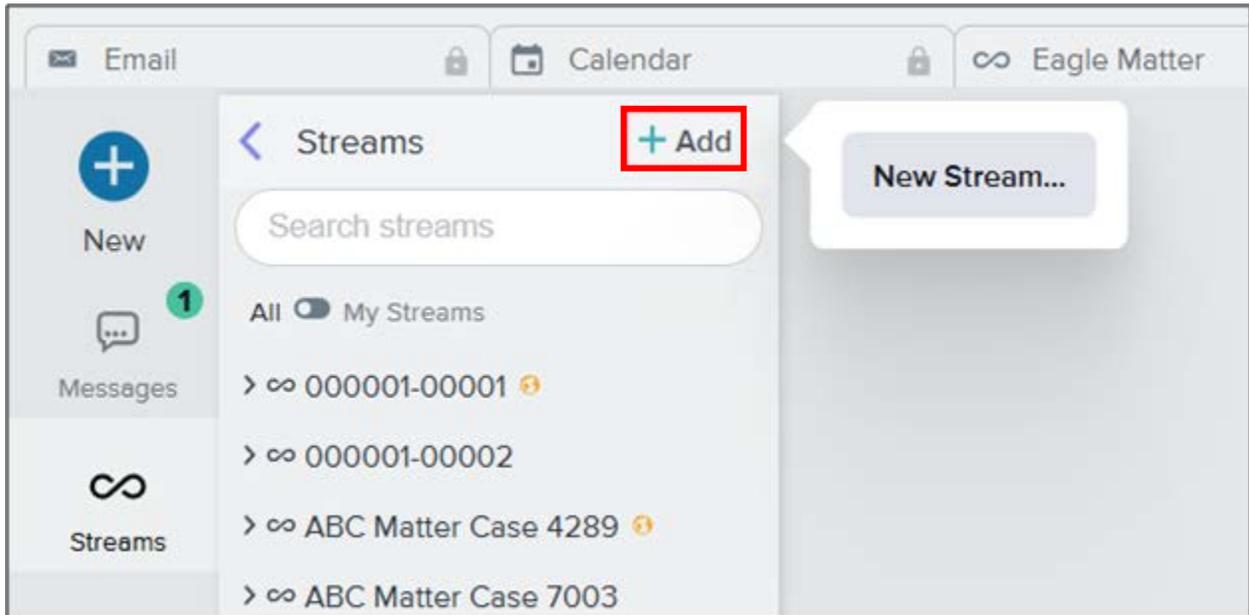
There are 1 users

<input type="checkbox"/>	▼ Andy Richmond lijeyo2905@mailrn1.com	User Status Full Member
Joined	TOTP Auth	SMS Auth
June 25, 2020	No	No
User Permissions		
<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> Compliance	<input checked="" type="checkbox"/> 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**.

New Stream ✕

Details

Name * Abbreviation

Eagle Matter

Description

Streams organize Tasks, Channels, and Files into one pane of glass, allowing teams to collaborate securely and efficiently.

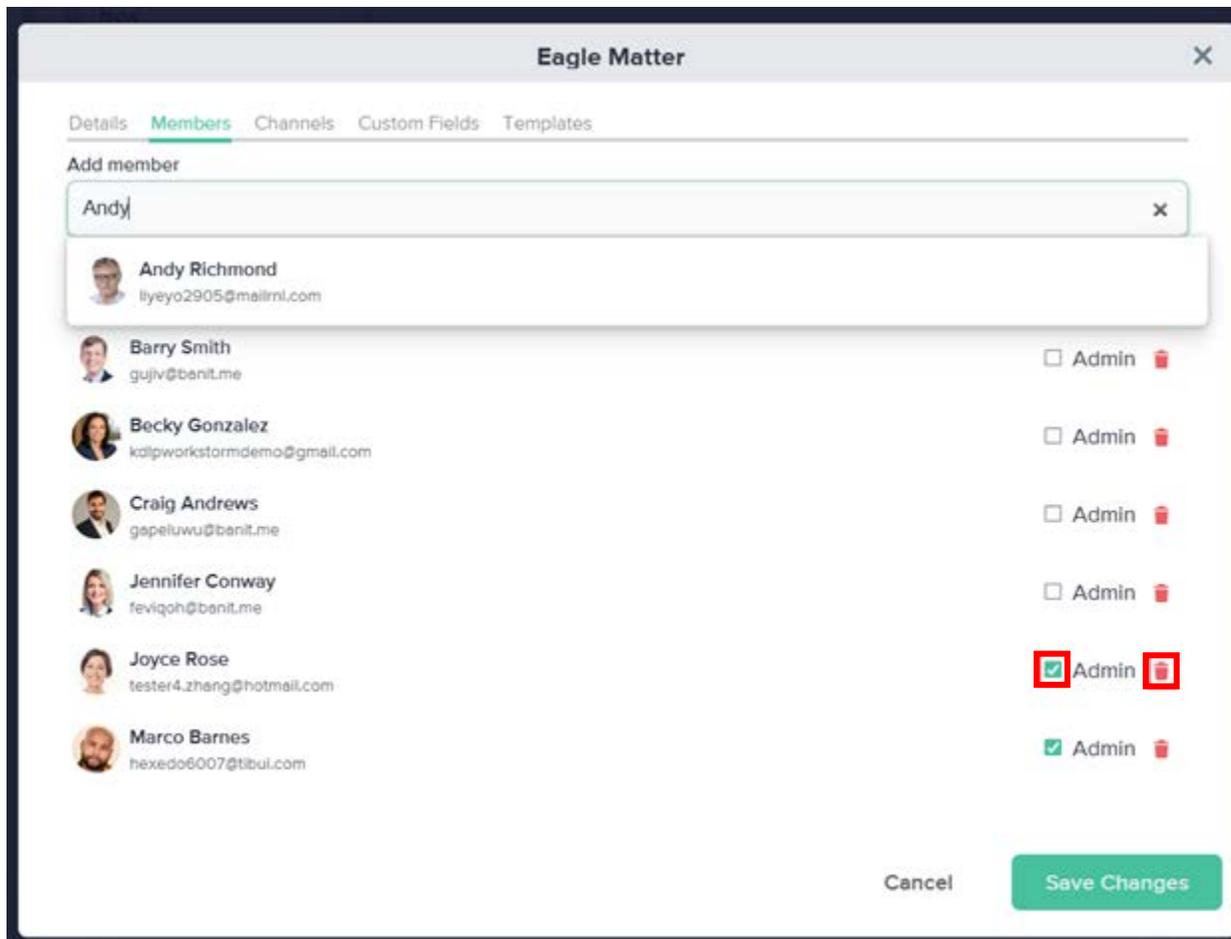
Enabled
All stream channels are disabled

Cancel 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**.

Eagle Matter

Details Members Channels Custom Fields Templates

Name * Abbreviation

Eagle Matter EM

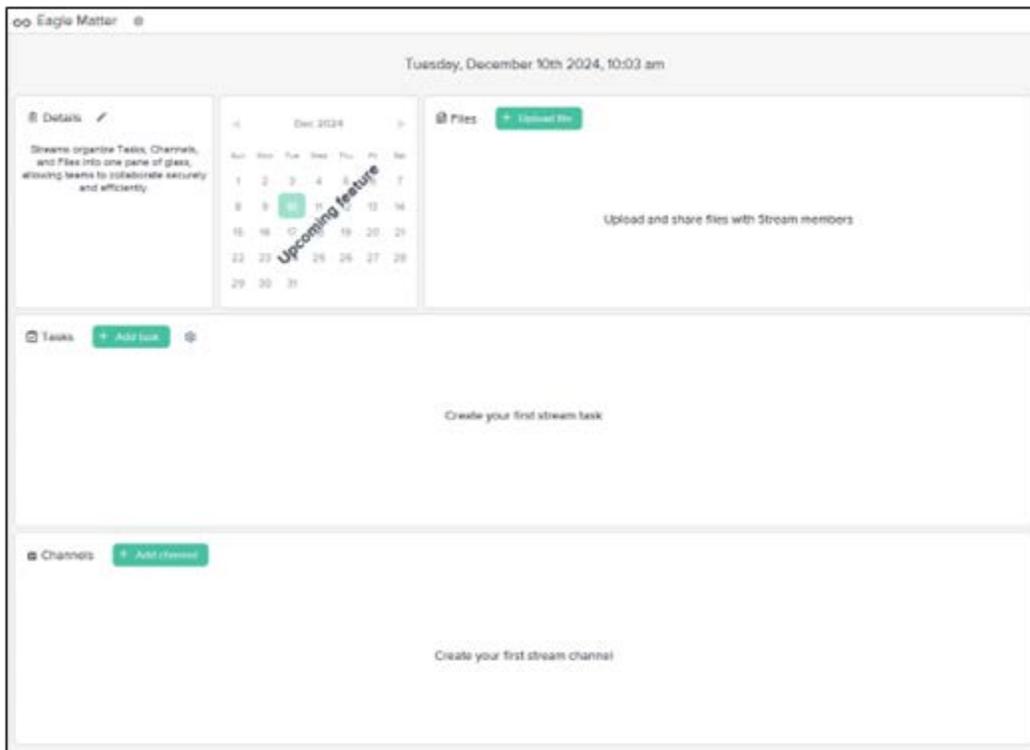
Description

Streams organize Tasks, Channels, and Files into one pane of glass, allowing teams to collaborate securely and efficiently.

Enabled
All stream channels are disabled

Cancel Save Changes

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

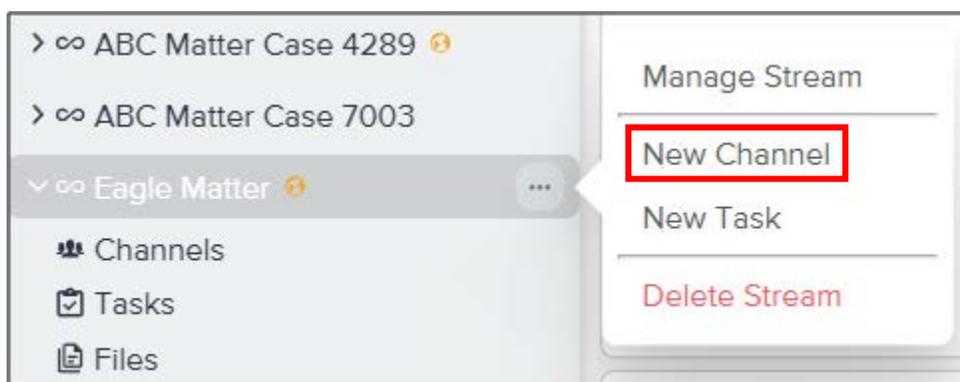


Only Stream Admins can create new Stream Channels. Additionally, only a Stream Admin can appoint, or be appointed as, a Stream Channel Admin. The Stream Admin who creates a Channel is by default the Channel Admin.

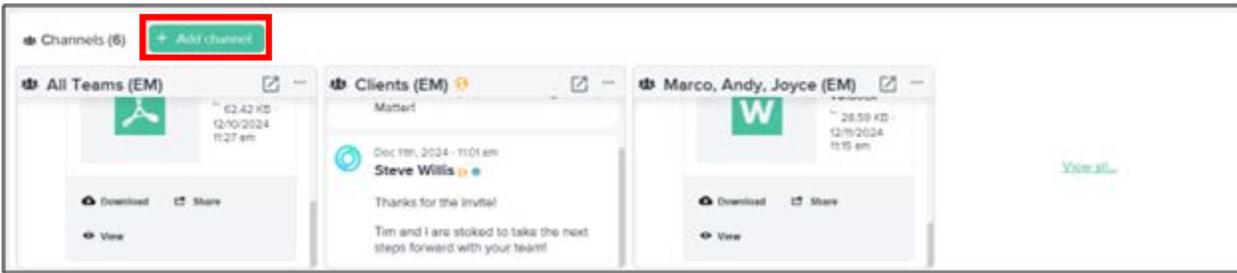
Single Channel

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

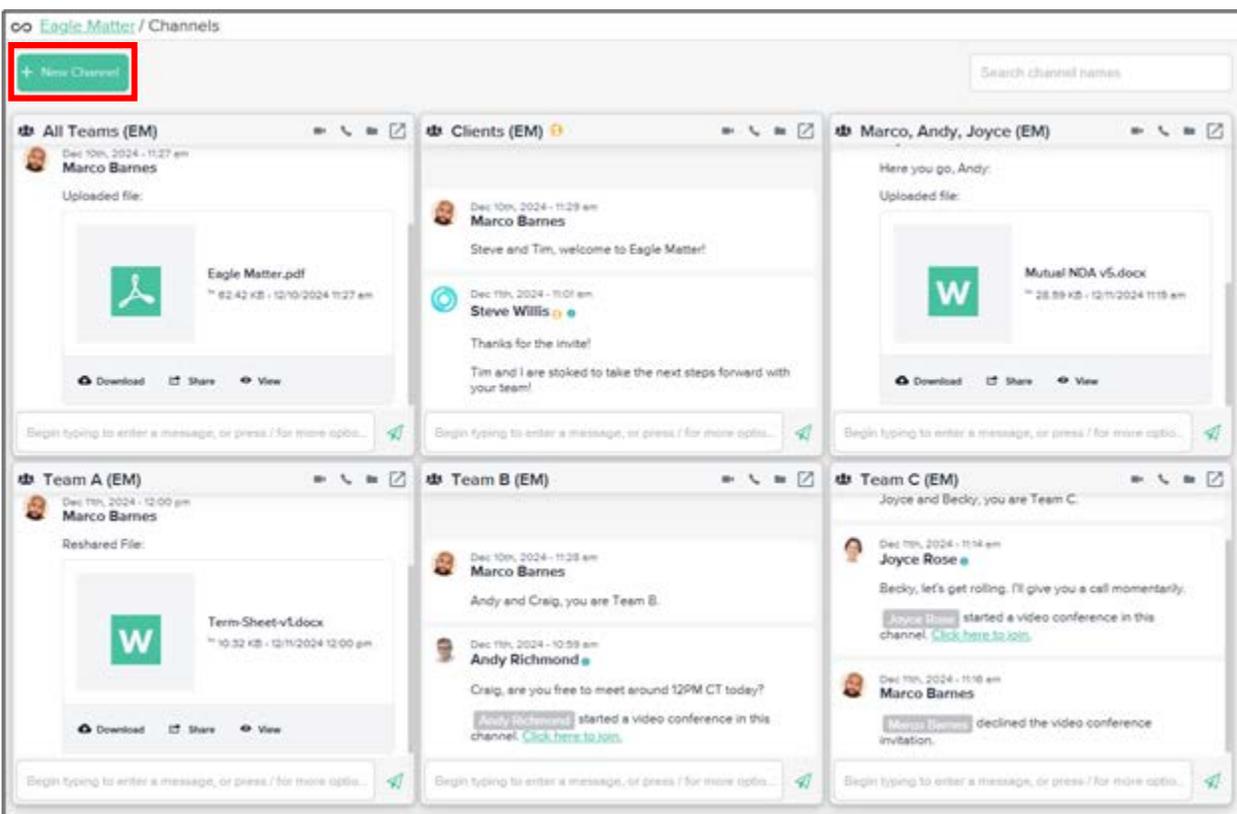
- **Streams Sidebar:** Click the ellipsis to the right of the Stream name to quickly create a Stream Channel from anywhere in the platform.



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



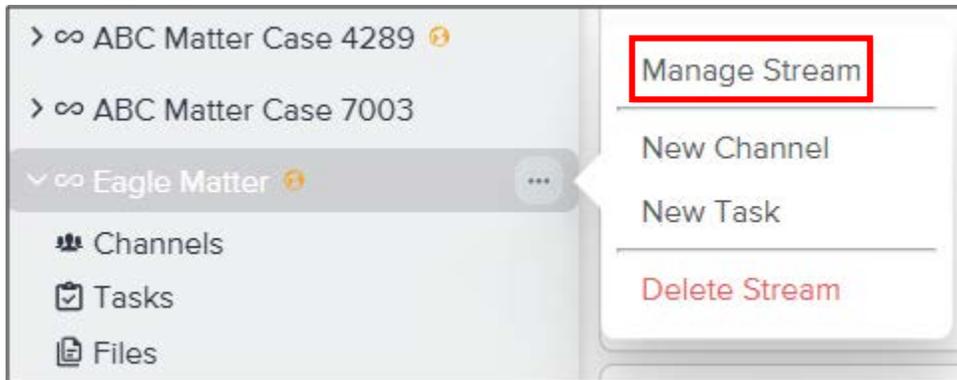
- **Channels Dashboard:** Click the **+New Channel** button to quickly create a new Channel, straight from the Channels dashboard.



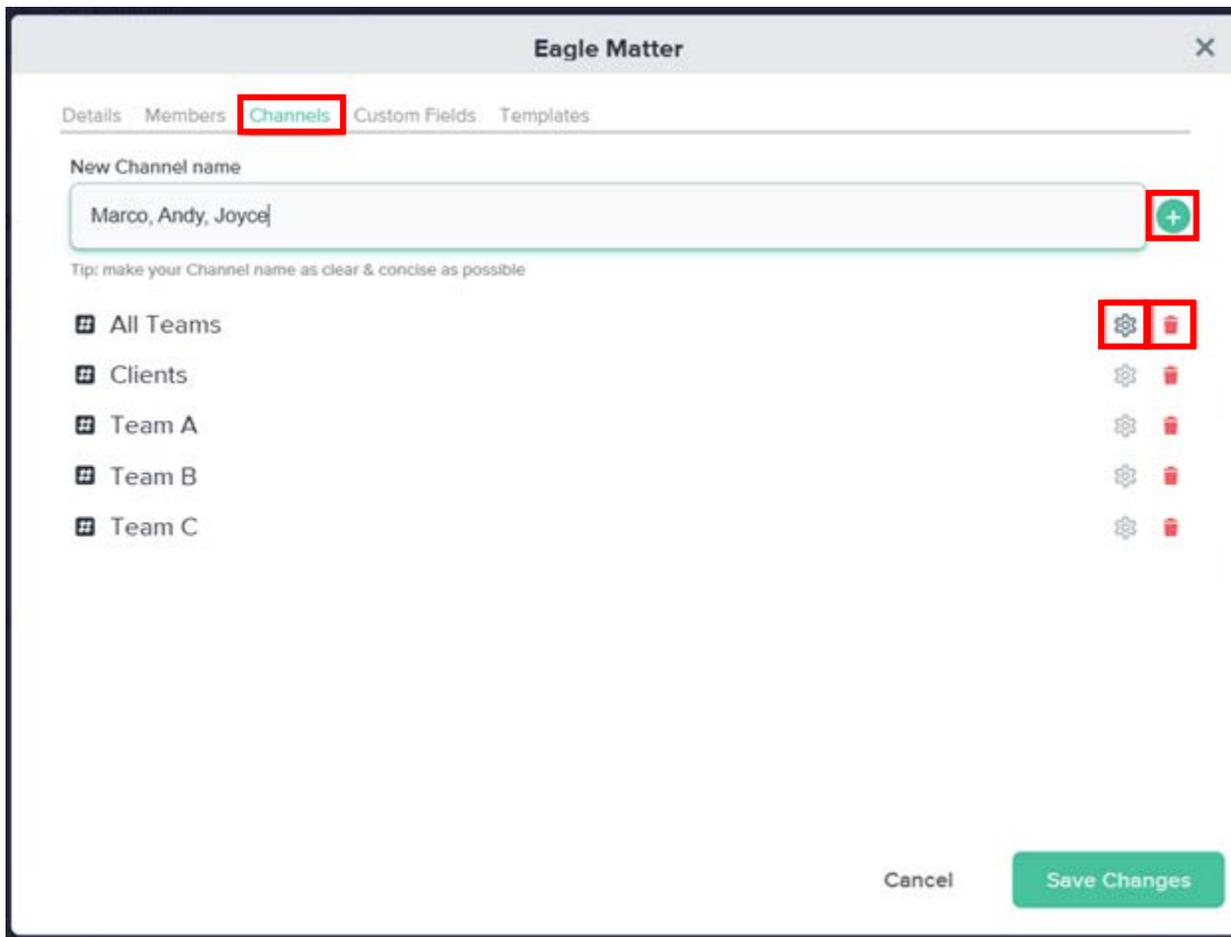
Multiple Channels

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](#).

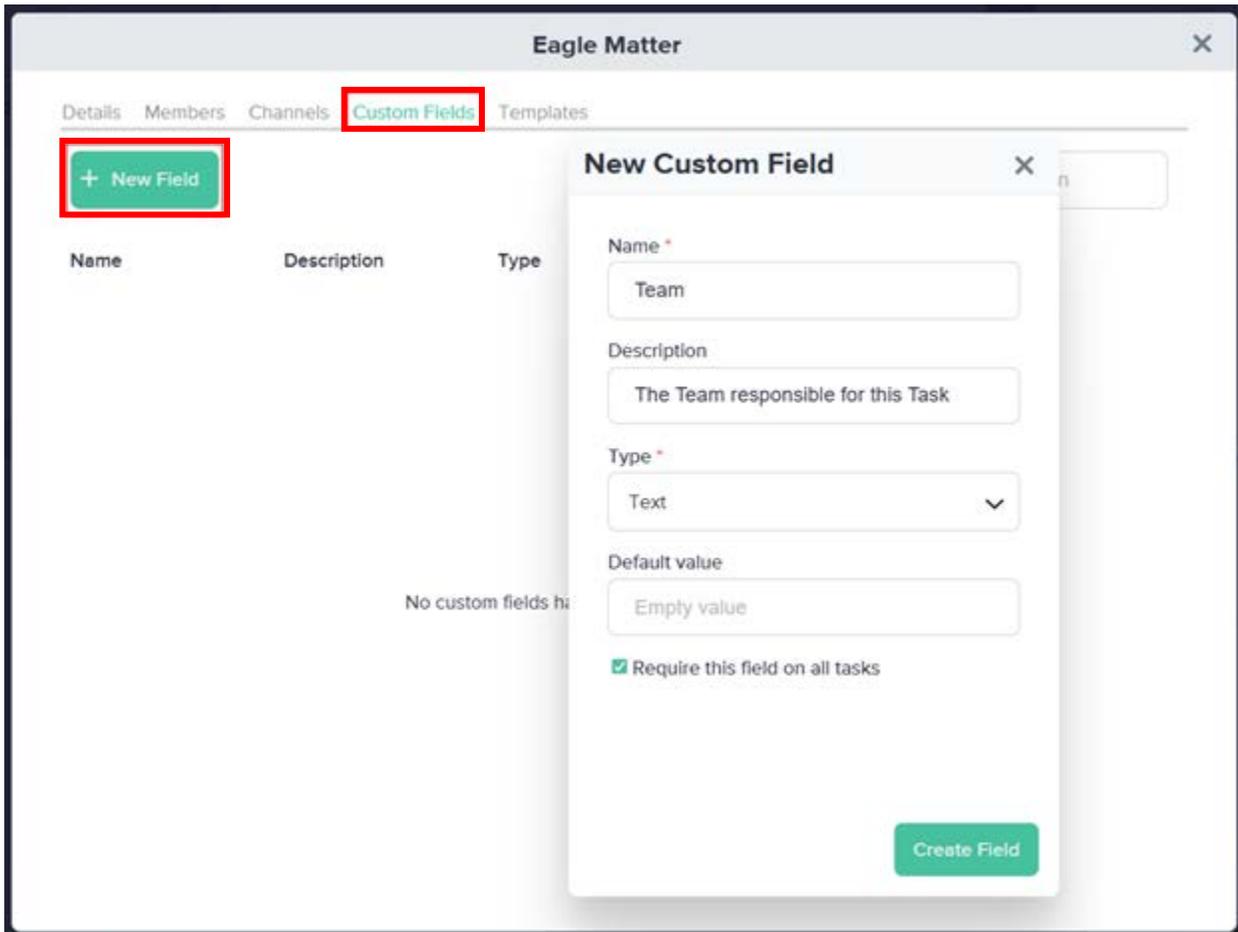
Managing Tasks

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.

Type *

Single Select

Add an option

A

B

C

Default value

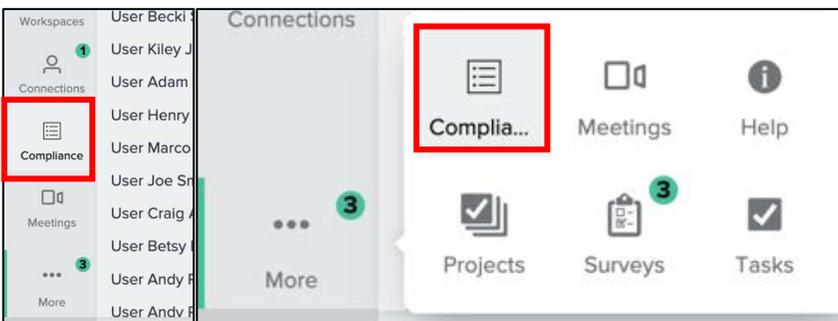
A

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

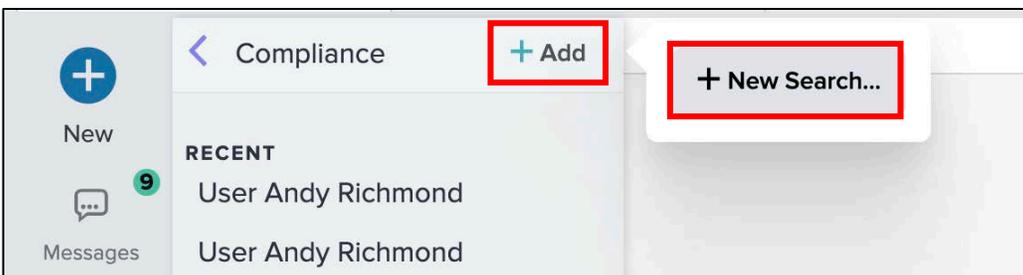
Compliance for Streams

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.

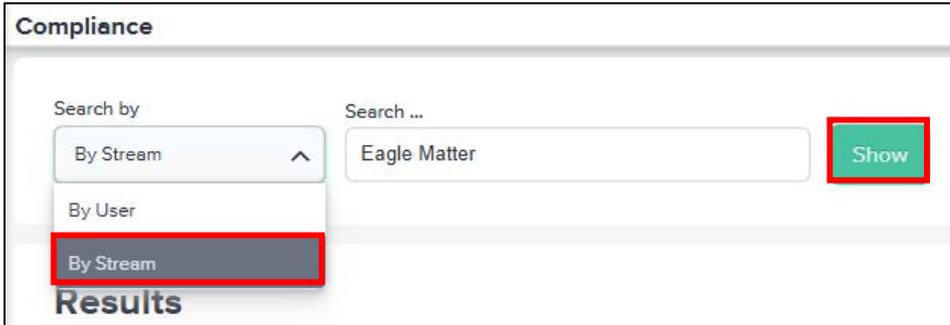
1. Click the *Compliance* icon in the left sidebar or *More* menu.



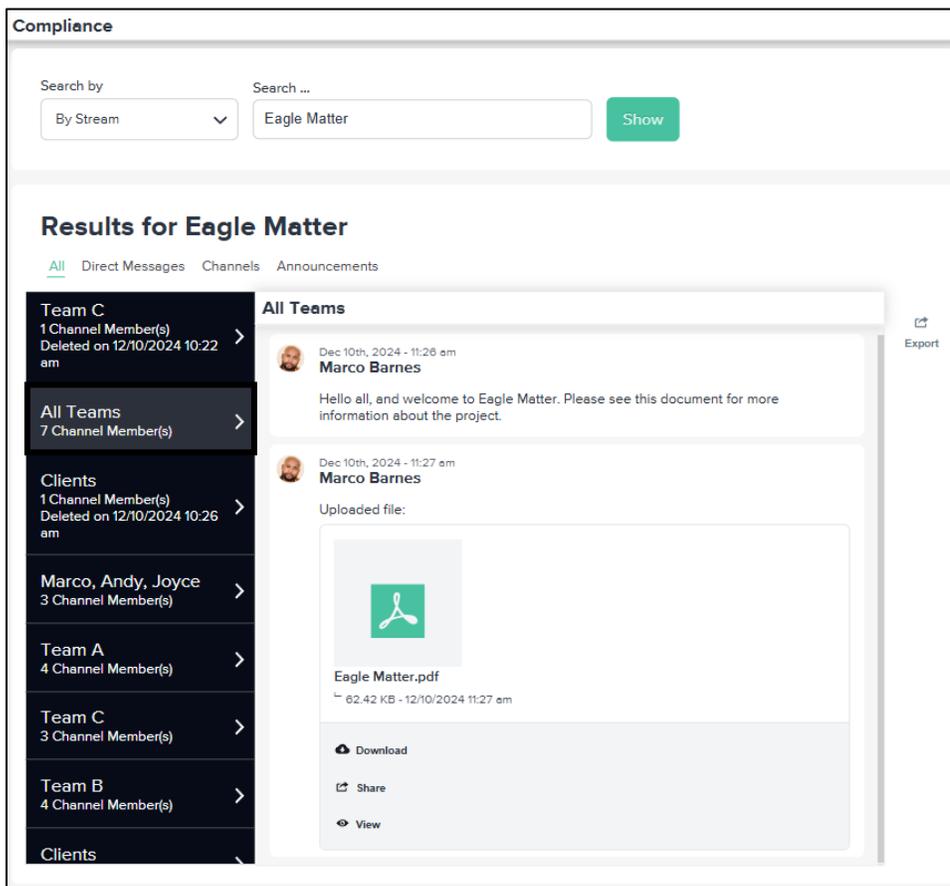
2. Click the **+Add** button at the top right of the *Compliance* menu and select **+New Search**.



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.

The screenshot shows a web interface titled "Results for Eagle Matter". At the top, there are tabs for "All", "Direct Messages", "Channels", and "Announcements". On the left, there is a sidebar with a list of teams: "Team A" (4 Channel Member(s)), "Team C" (3 Channel Member(s)), "Team B" (4 Channel Member(s)), and "Clients" (4 Channel Member(s)). The main content area is titled "Clients" and displays a list of messages. The first message is from "Marco Barnes" dated "Dec 10th, 2024 - 11:29 am" with the text "Steve and Tim, welcome to Eagle Matter!". The second message is from "Steve Willis" dated "Dec 11th, 2024 - 11:01 am" with the text "Thanks for the invite!". The third message is from "Tim" dated "Dec 11th, 2024 - 11:02 am" with the text "Tim and I are stoked to take the next steps forward with your team!". On the right side of the message list, there is a red-bordered button with a download icon and the text "Export".

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

The screenshot shows a dialog box titled "Export Messages" with a close button (X) in the top right corner. Below the title, there is a paragraph of text: "Select a date and time that will be used as the starting point of a message export by using the provided calendar and time selector below Start Date. If there were multiple message sent at the same time, the first message sent at that particular time will be defined as the starting point. Then, choose an end date and time to finalize the selection of messages that can be downloaded as an excel (.xls) file." Below this text is a section titled "Select Date Range". It contains two rows of input fields. The first row is for the "Start Date" and has a date field with "1/1/2024" and a time field with "10:00 AM" and a dropdown arrow. The second row is for the "End Date" and has a date field with "7/23/2024" and a time field with "10:00 AM" and a dropdown arrow. At the bottom right of the dialog, there are two buttons: "Cancel" and "Next". The "Next" button is highlighted with a red border.

9. Click **Download**.

The screenshot shows the same "Export Messages" dialog box. It now displays the selected date range and the messages that will be exported. Under "First message selected:", there is a text box containing "Marco Barnes 12/10/2024 11:29 am" and "Steve and Tim, welcome to Eagle Matter!". Below this, there is a separator line and "1 Other". Under "Last message selected:", there is a text box containing "Steve Willis 12/11/2024 11:02 am" and "Tim and I are stoked to take the next steps forward with your team!". At the bottom right, there is a text label "(3) Total Messages". At the bottom of the dialog, there are two buttons: "Back" and "Download". The "Download" button is highlighted with a red border.

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.