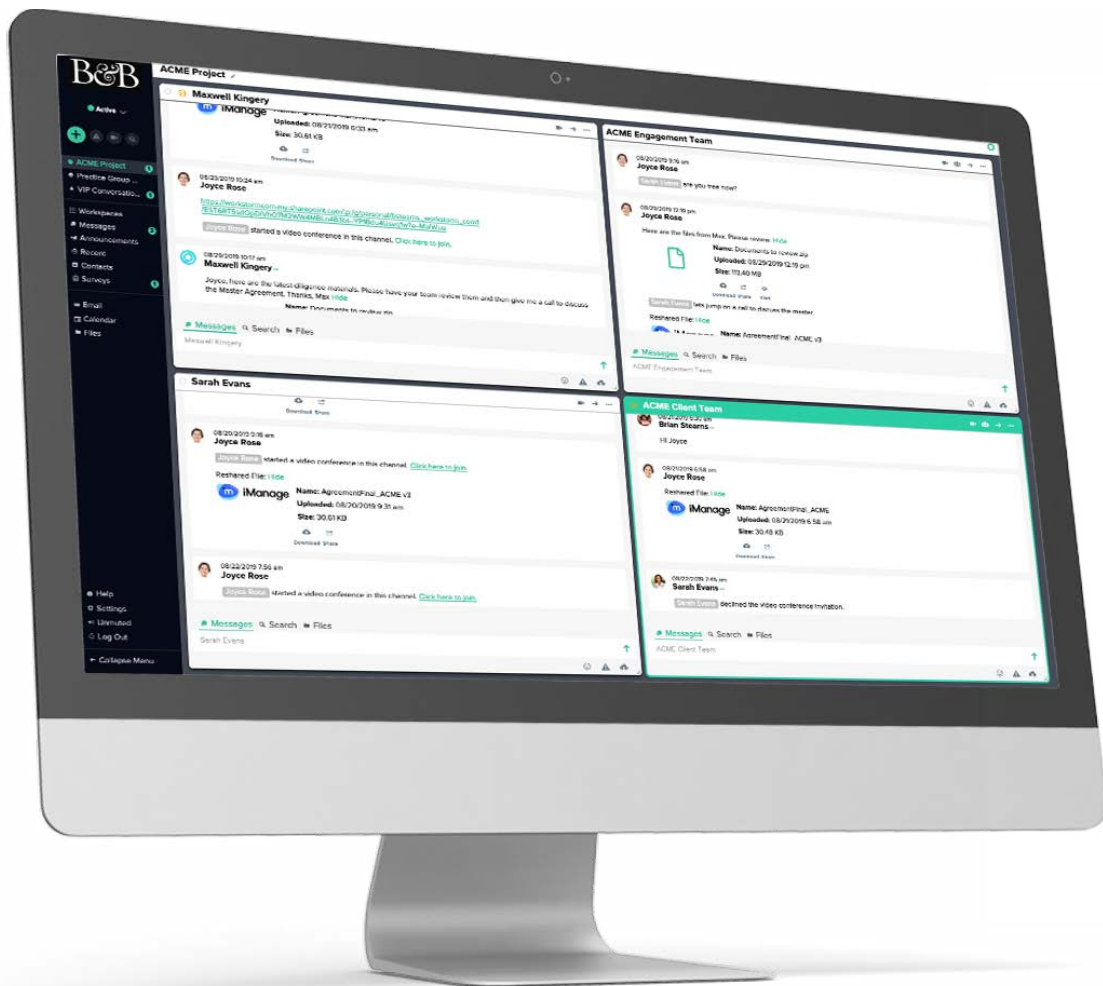


WORKSTORM™

Site Administrator Guide



Serious collaboration for serious business.

INTRODUCTION

Each company account on Workstorm is customizable by the Site Administrator to meet the unique needs of your organization. This Site Administrator guide is designed to help new Admins get up to speed quickly, customize account settings, enable security settings and set user functionalities.

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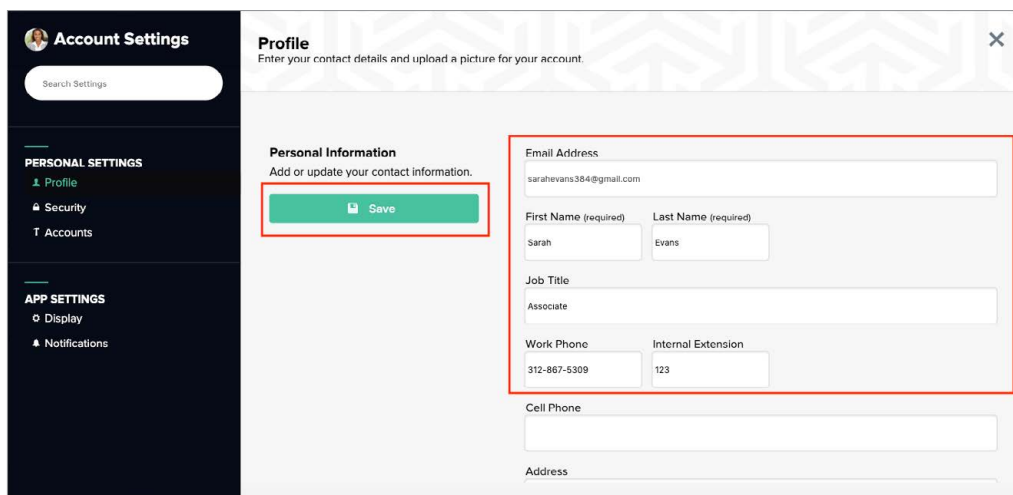
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PERSONAL ACCOUNT SETUP

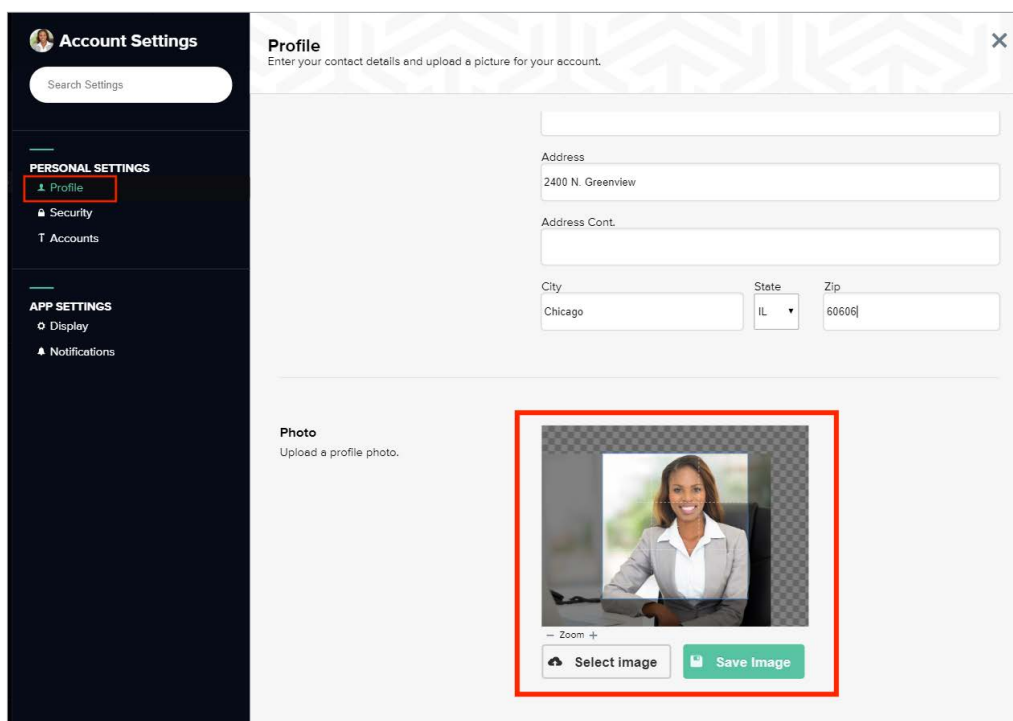
Sign up for Workstorm via the email invite from support@workstorm.com. After accepting the invite, you will be redirected to create a password and log in.

PROFILE

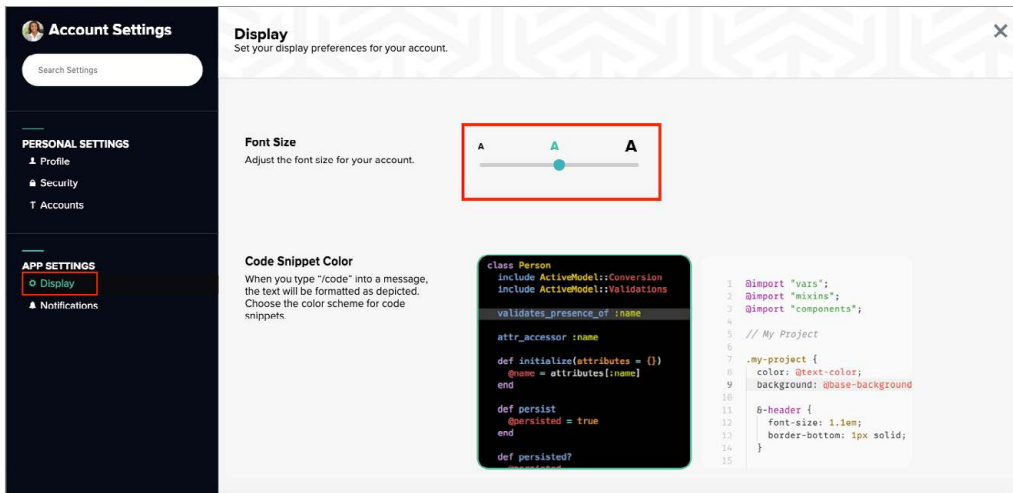
Select **Settings**, then **Profile** in the left menu to customize your profile. Upload a profile picture and add contact information. Select **Display** to adjust font size across the platform to your preference.



The screenshot shows the 'Profile' settings page. On the left is a dark sidebar with 'Account Settings' and a search bar. Below are sections for 'PERSONAL SETTINGS' (Profile, Security, Accounts) and 'APP SETTINGS' (Display, Notifications). The main content area is titled 'Profile' and contains a 'Personal Information' section with the instruction 'Add or update your contact information.' A green 'Save' button is highlighted with a red box. The form fields include: Email Address (sarahevens384@gmail.com), First Name (Sarah), Last Name (Evans), Job Title (Associate), Work Phone (312-867-5309), Internal Extension (123), Cell Phone, and Address.



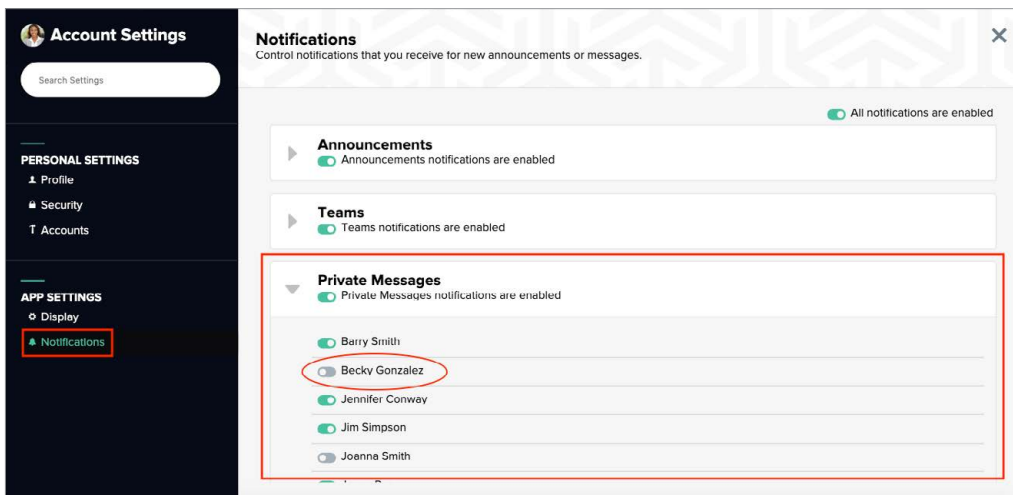
The screenshot shows the 'Profile' settings page with the 'Photo' section highlighted. The sidebar is the same as in the previous screenshot. The main content area shows the 'Photo' section with the instruction 'Upload a profile photo.' A photo of a woman in a grey blazer is shown within a red-bordered box. Below the photo are 'Zoom' controls and two buttons: 'Select image' and 'Save Image'. The address fields from the previous screenshot are visible above the photo section.



NOTIFICATIONS

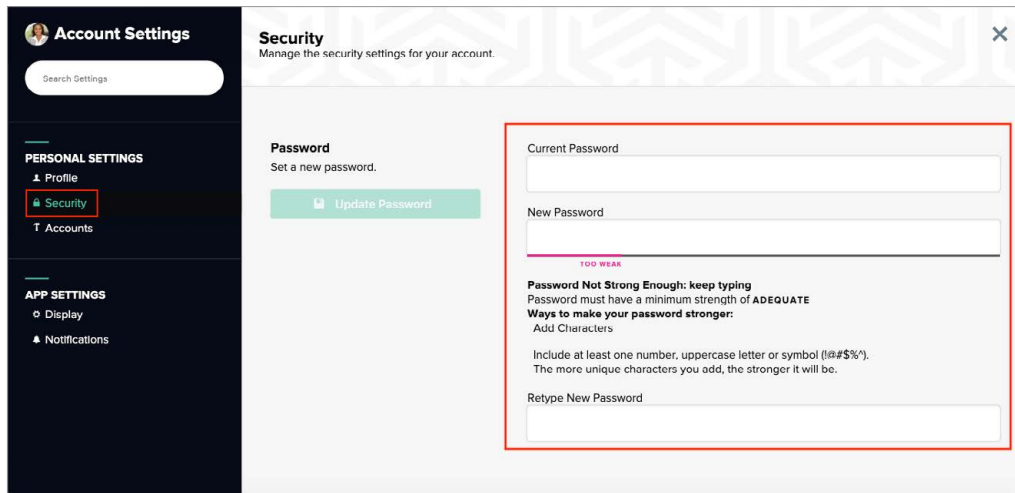
Select **Settings**, then **Notifications** to enable or disable push notifications for incoming messages, alerts, and video calls. Customize notification preferences by conversation, as desired.

NOTE: *Enabling notifications is recommended for all Site Administrators and members to help you never miss a message.*



PASSWORD RESET

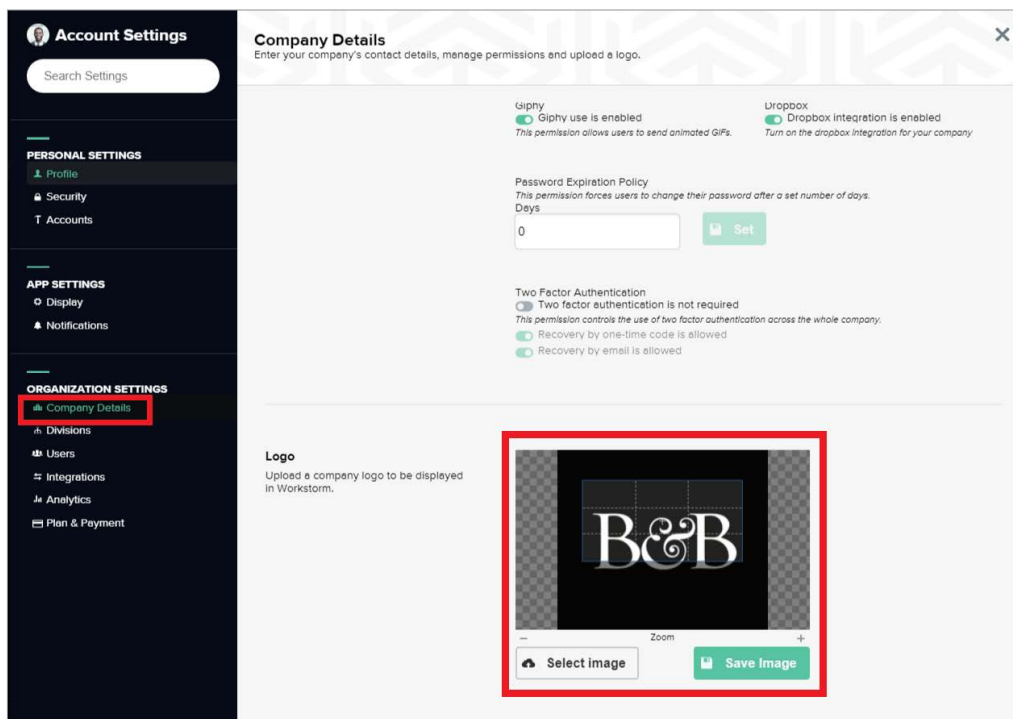
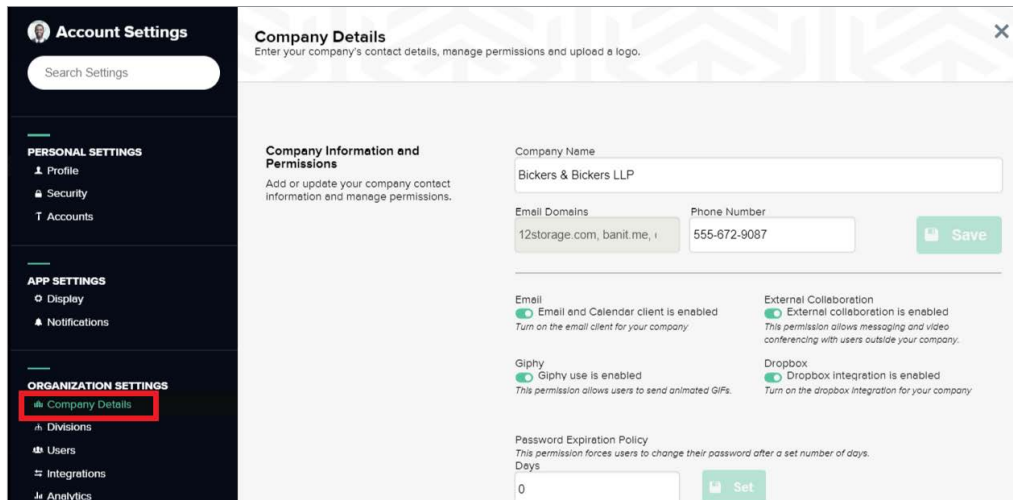
Select **Settings**, then **Security** to reset your password. Update your password regularly for security and to comply with password requirements set by your company.



MANAGE COMPANY ACCOUNT

COMPANY SETTINGS

After enabling notifications and setting up your personal profile, select [Company Details](#) to customize your company profile and settings. Confirm your company name and upload a company logo to brand your company account on Workstorm.



MANAGE EMAIL DOMAINS

Confirm the email domains associated with your company account. If external collaboration is enabled, any user that is invited to a Team or Private message that doesn't have a matching email domain will be considered an external member. ***If you would like to update the email domains associated with your company's Workstorm account, please contact your Account Representative or submit a [support ticket](#).***

Account Settings

Search Settings

PERSONAL SETTINGS

- Profile
- Security
- Accounts

APP SETTINGS

- Display
- Notifications

ORGANIZATION SETTINGS

- Company Details
- Divisions
- Users
- Integrations
- Analytics

Company Details

Enter your company's contact details, manage permissions and upload a logo.

Company Information and Permissions

Add or update your company contact information and manage permissions.

Company Name
Bickers & Bickers LLP

Email Domains
12storage.com, banit.me, r

Phone Number
555-672-9087

Save

Email

Email and Calendar client is enabled
Turn on the email client for your company.

External Collaboration

External collaboration is enabled
This permission allows messaging and video conferencing with users outside your company.

Giphy

Giphy use is enabled
This permission allows users to send animated GIFs.

Dropbox

Dropbox integration is enabled
Turn on the dropbox integration for your company.


Password Expiration Policy

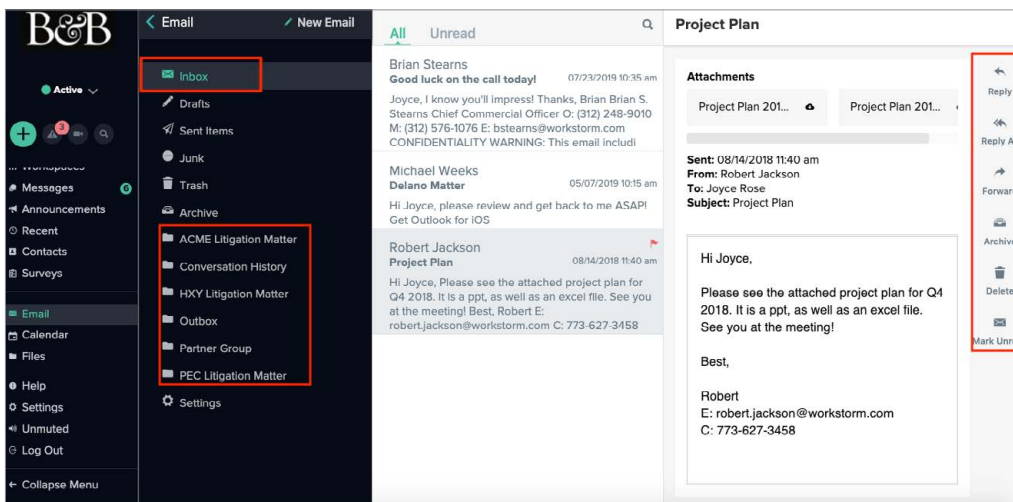
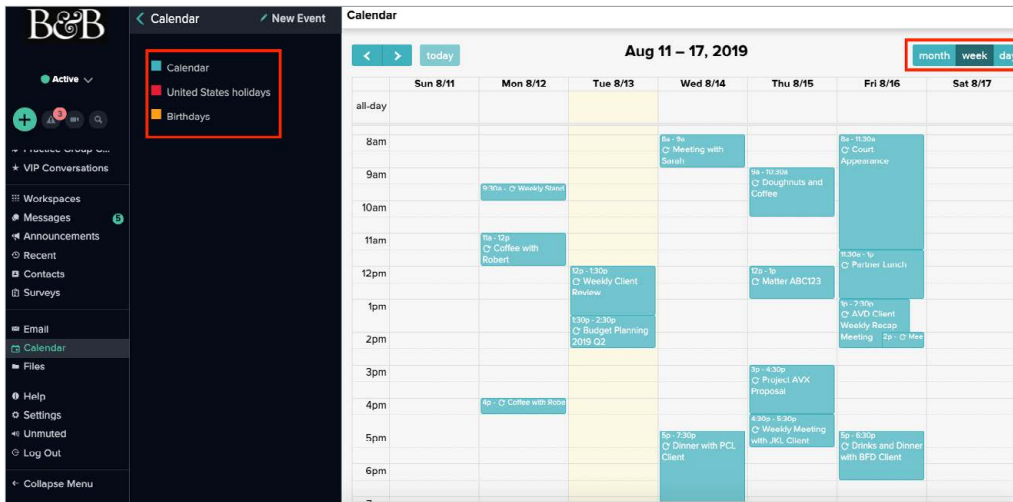
This permission forces users to change their password after a set number of days.

Days
0

Set

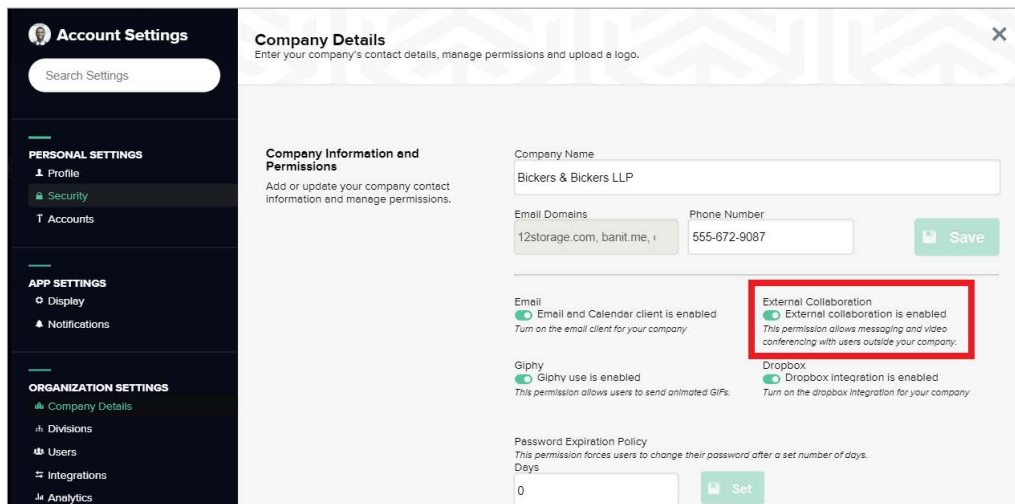
CALENDAR / EMAIL

Click the  toggle to enable Email and Calendar functionality. If your company uses Office 365, users will be able to login to their email and calendar account and use them within Workstorm. **Please contact your Account Representative or submit a [support ticket](#) if your Company does not use Office 365 and you would like to discuss a potential integration.**




EXTERNAL COLLABORATION SETTINGS


Click the  to allow Company members to invite and collaborate with External members.

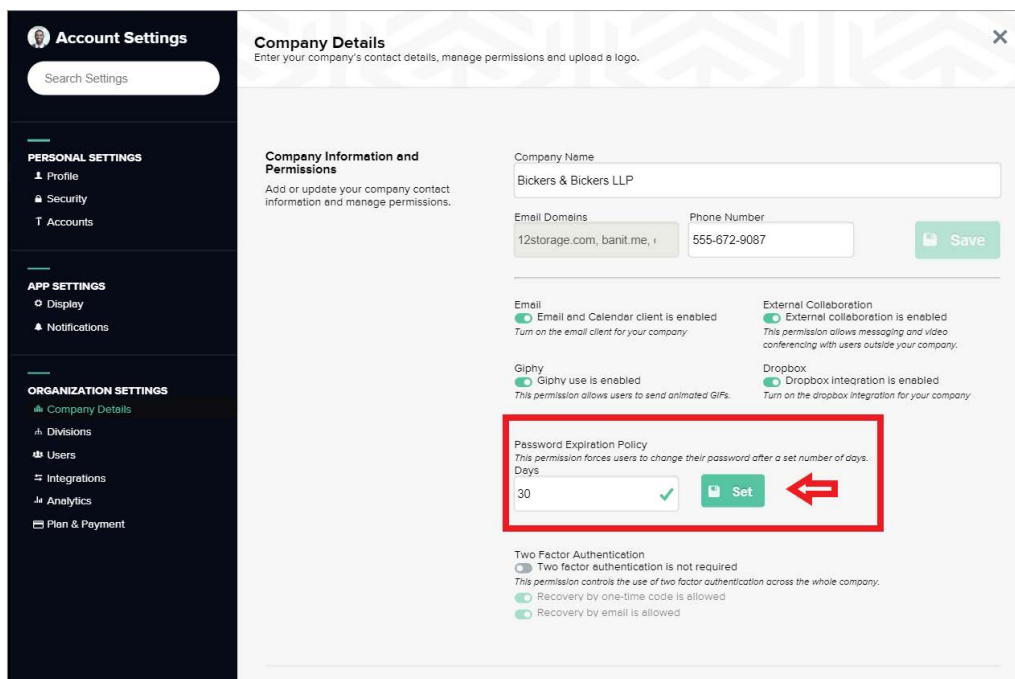


GIPHY PERMISSIONS

Click the  to allow members to use GIPHYs, or animated images, in Messages.

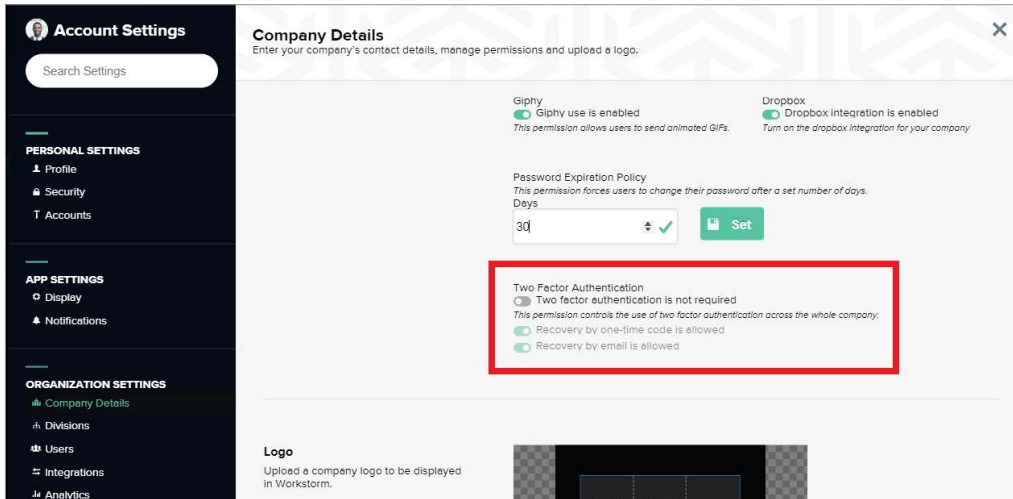
PASSWORD POLICY

Click the  to set a password expiration policy for all members. Once enabled, set the number of days until member passwords will expire and must be reset by the members.

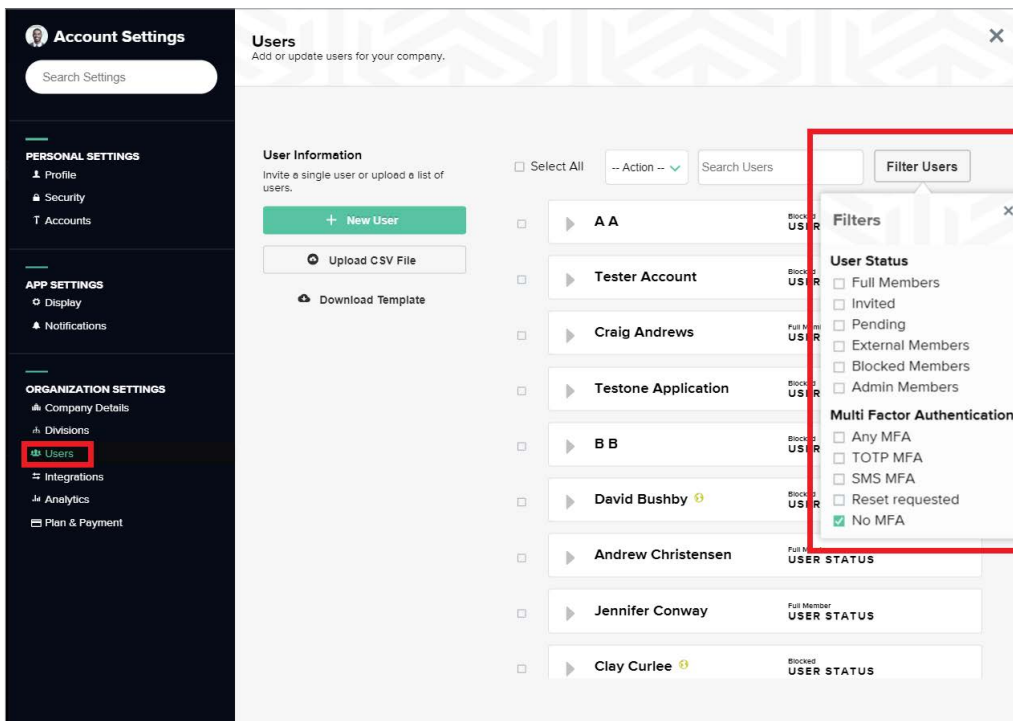


TWO FACTOR AUTHENTICATION

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

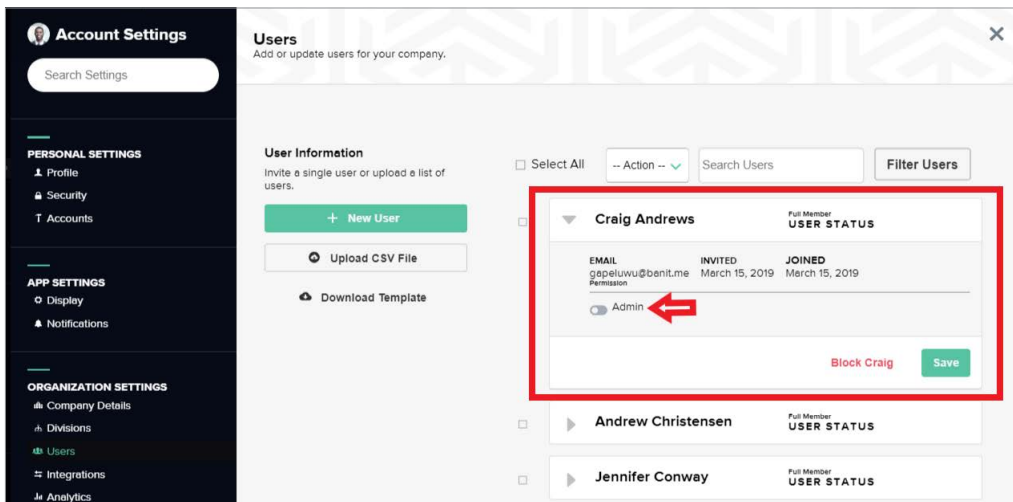


As the Site Administrator, you can review requests to reset Company Members' 2FA, see who has 2FA enabled and which 2FA method they are using (SMS or TOTP) by clicking on [Settings](#), then [Users](#). Select [Filter Users](#) and choose your filter criteria under Multi Factor Authentication.



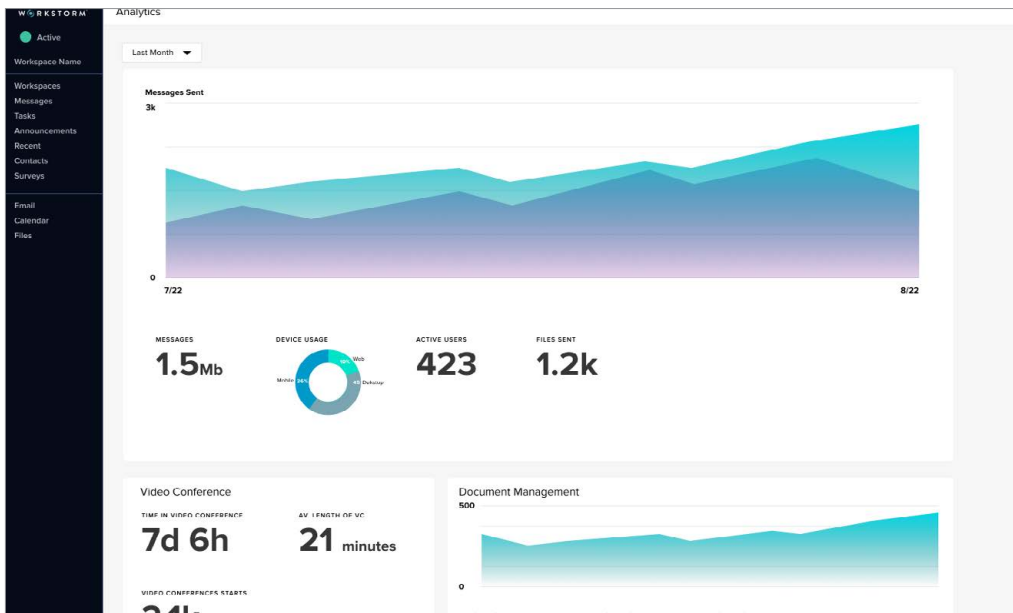
MANAGE ADMINISTRATORS

Select **Users** under Organization Settings, and then click on **Filter Users** and **Full Members**. Search for or scroll down to the colleague you wish to make a Site Admin. Click the dropdown to the left of their name, toggle on Admin and click save to confirm the user status change.



ANALYTICS DASHBOARD

Select **Analytics** under **Organization Settings** to track company wide data storage, messages and video conference use per month, and number of API Keys utilized.

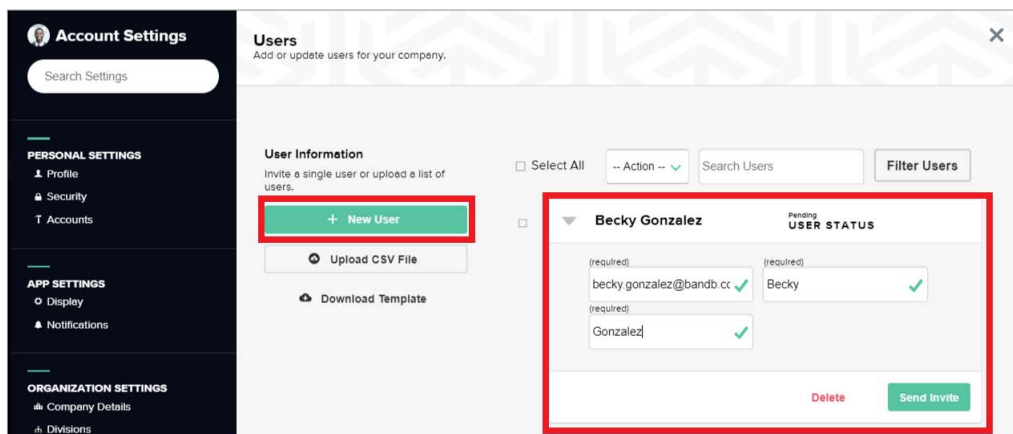


INVITING MEMBERS

Site Administrators have the ability to invite new members on an individual basis or in bulk by uploading a CSV file. Once invited, new members will receive an email invitation to join Workstorm from support@workstorm.com.

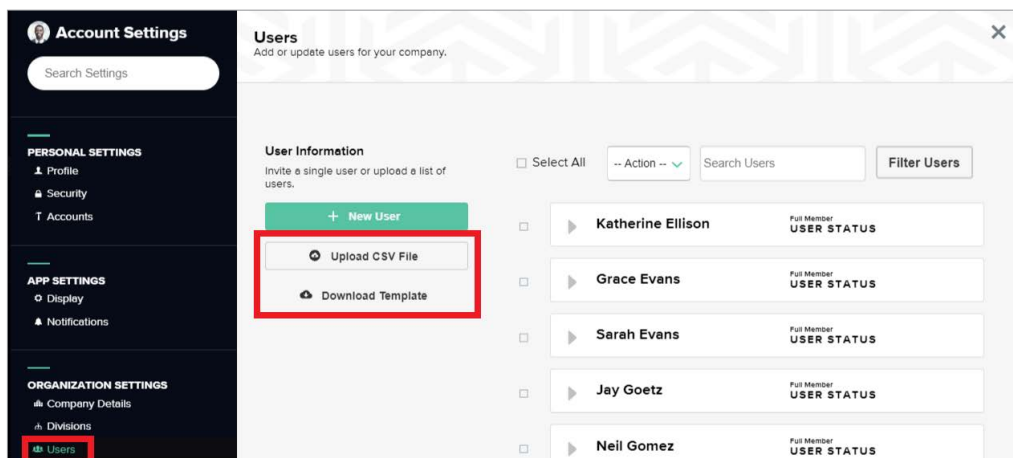
INVITE INDIVIDUAL MEMBERS

Select [Settings](#), and then [Users](#) under [Organization Settings](#). Click [New User](#) and type the person's email address and name, then click [Send Invite](#) to issue an email invitation. If a user is invited individually from within the User's settings menu, they will be added as a full company member even if their email domain does not match the domains selected for your Company's account.



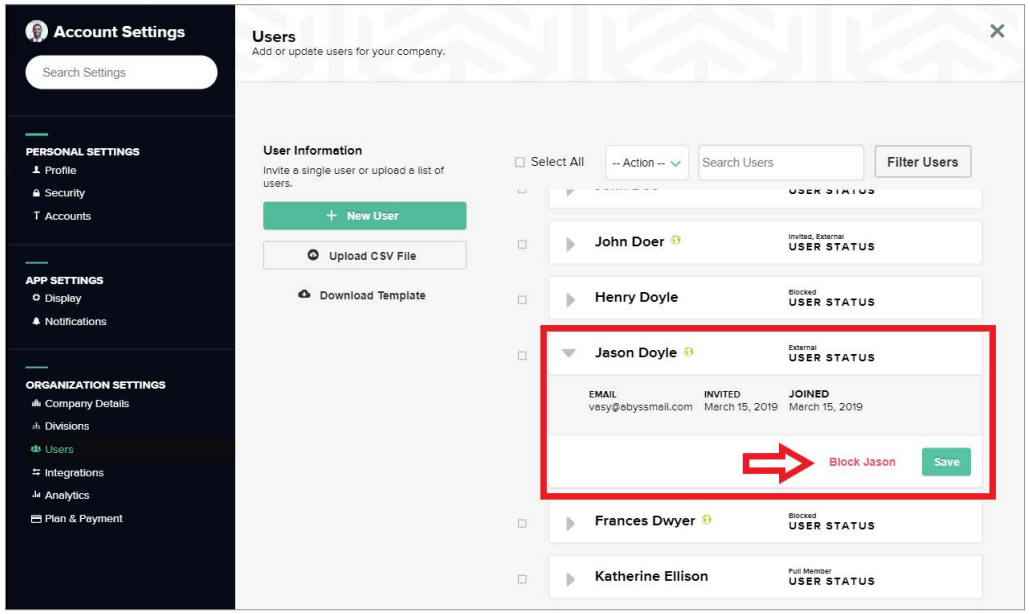
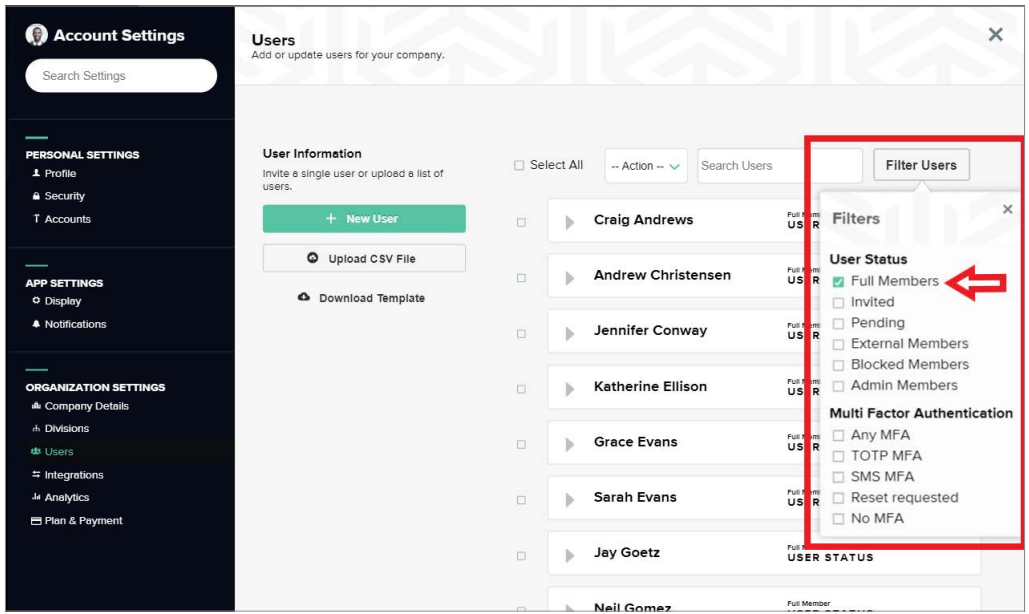
INVITE MEMBERS IN BULK

Select [Settings](#), and then [Users](#) under [Organization Settings](#). Click [Download Template](#) to obtain a formatted spreadsheet to invite multiple members. Enter the new company member details into the spreadsheet. Save in CSV format and click [Upload CSV File](#). Once uploaded, the invitees will be moved into a pending state. To complete the onboarding process for these new invitees, the Company Admin needs to confirm the invites for them to be sent.



MANAGE USERS AND INVITES

Select **Settings**, and then **Users** under Organization Settings. Search for a user or filter users by **Full Members**, **Invited**, **Pending**, **External Members**, **Blocked Members**, or **Admin Members**. Click the dropdown arrow to the left of the user's name to see more info, resend or rescind an invite, remove or block a user, and grant admin privileges.

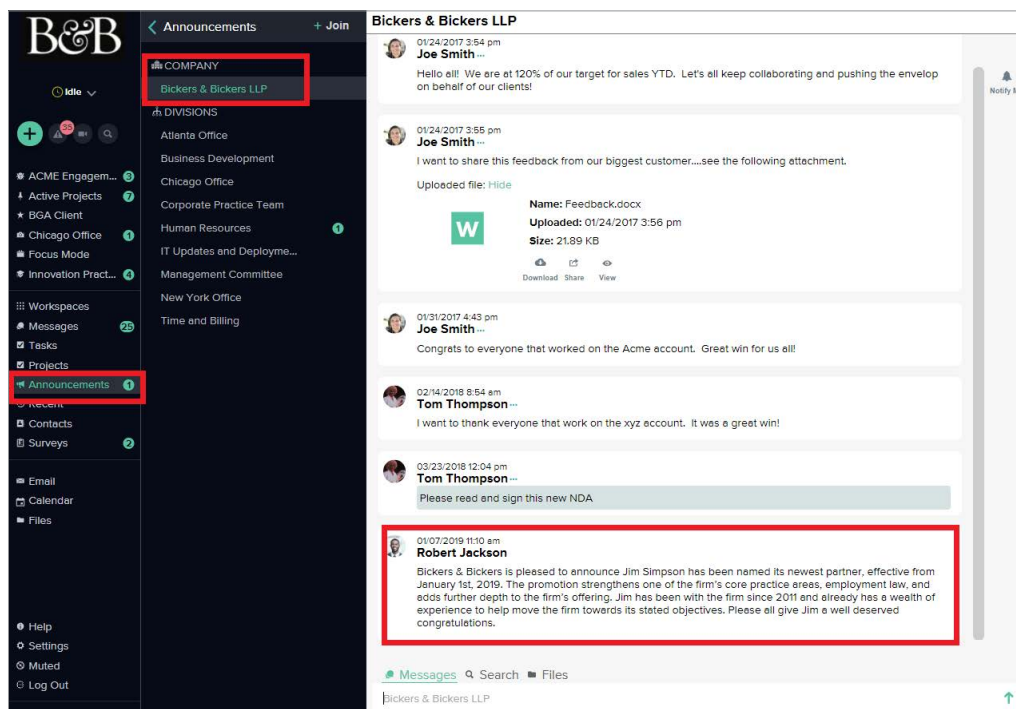


ANNOUNCEMENTS



Site Administrators have the ability to send one-way company-wide or division announcements and files to members.

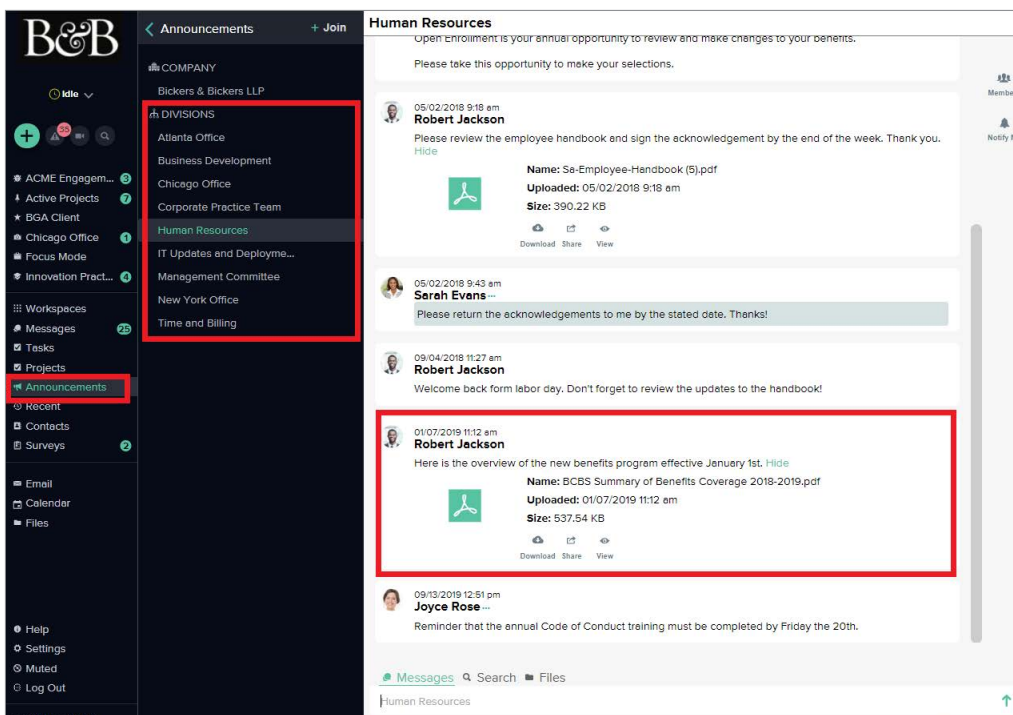
COMPANY ANNOUNCEMENTS

Select **Announcements**, and then **Company** in the left menu. Type a message to send out a new announcement to all Internal company members.



DIVISION ANNOUNCEMENTS

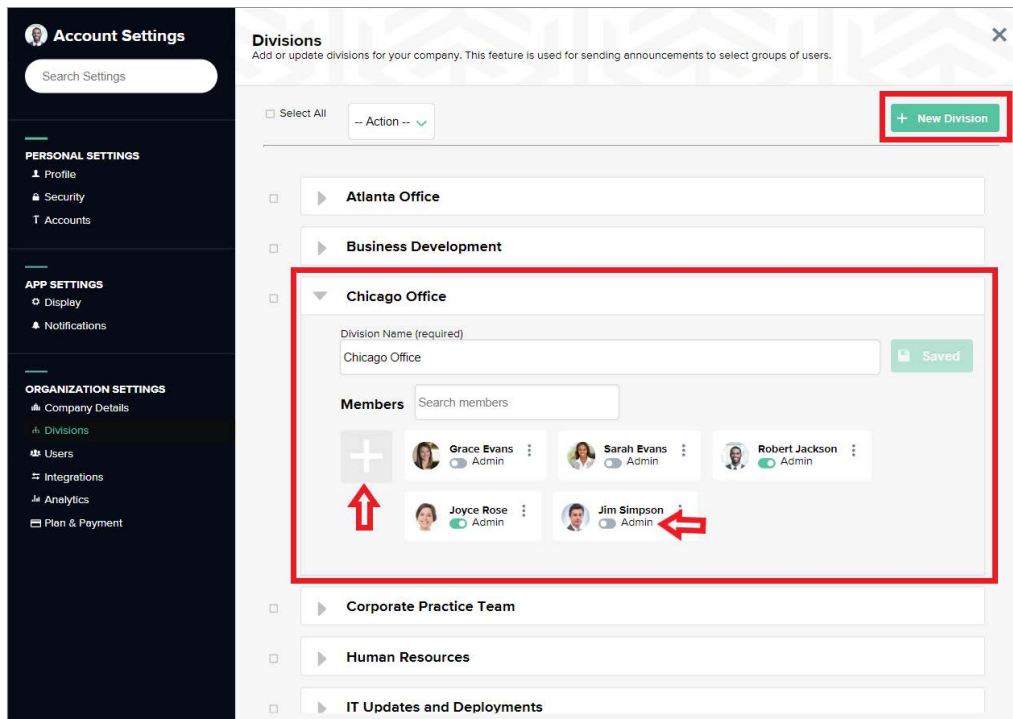
Select **Announcements**, and then **Divisions**. Select the Division to which an announcement will be sent. Use the message box to start a new announcement to all Division members. Select the  icon to upload files. Click the  icon or press **Enter** on the keyboard to send the announcement.



MANAGING DIVISIONS

Select **Settings** and then **Divisions** under Organization **Settings**. Click **New Division** to create another division to add to your company's Workstorm instance. Edit the name, and click the gray plus icon below the Members search bar to add company members to the division. Grant Division messaging privileges with the Admin toggle . Remove members by clicking the ellipsis to the right of an existing member's name.

If you want to make changes to an existing Division, click the drop down arrow to the left of that Division's name.



Delete a Division by checking the box to the left of the Division's name and clicking the Action dropdown menu to the right of Select All. Within the Action dropdown menu, select **Delete** to remove the checked Division from your Company's Division list.

MEMBER GUIDE

Be sure to download the [Member Guide](#) for details on using all the various features and functionality available to members in Workstorm. The guide includes instructions for:

- Private and Team Messages
- Video Conferencing
- Workspaces
- Email Integration
- File Management and DMS Integrations
- Desktop and Mobile Apps
- Alerts and Urgent Messages
- Search
- Surveys
- And so much more...

QUESTIONS?

A Workstorm customer support representative is here to help. Simply click [here](#) to create a support ticket or to provide product feedback.