

Site Administrator Guide

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Serious collaboration for serious business.

Additional video tutorials and web articles can be found at helpdesk.workstorm.com

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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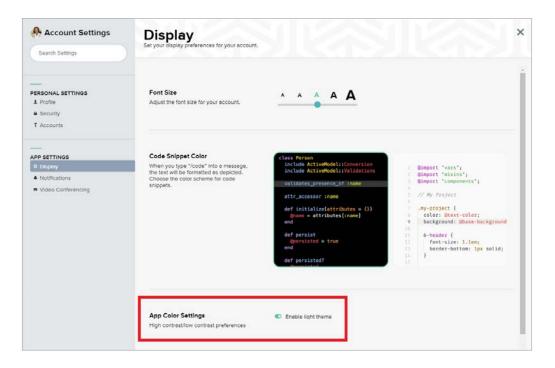
PERSONAL ACCOUNT SETUP

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* at the bottom of the left side bar, then *Profile* to customize your profile. Upload a profile picture and add contact information. Select *Display* to adjust font size across the platform and choose a platform color theme based on your preference.

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Accounts	First Name (required) Last Name (required)	
	Sarah Evans	
SETTINGS	Job Title	
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Accounts	2400 N. Greenview Ave. Address Cont.	
- SETTINGS	City State Zip	
SETTINGS Jiaplay	Chicago IL •	
Notifications Video Conferencing		



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.

Account Settings	Notifications	×
Search Settings	Control notifications that you receive for new announcements or messages.	
	Email Notifications Set your preferences for receiving email reminders about missed messages, elerts and video call invitations waiting for your response.	ï
PERSONAL SETTINGS 1. Profile 9. Security	Workstorm Email Reminders You will receive an email anytime you have unread messages	
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	Desktop Notifications C All notifications are enabled	
APP SETTINGS © Display	Announcements Announcements notifications are enabled	
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	C Robert Jackson	
Log Out	O Tom Thompson	•

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.

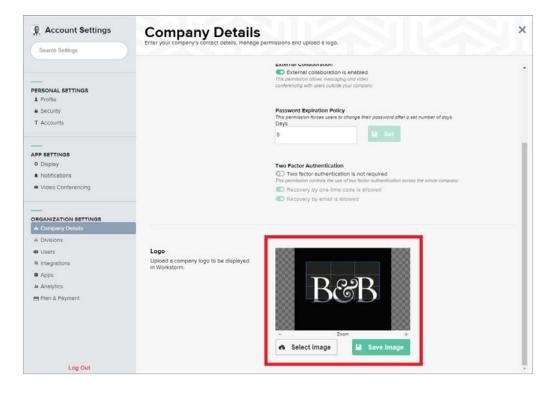
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Source Saturgs Personal settings I Profile Security T Accounts App Settings O Display Notifications Video Conferending	Pessword Set a new password. I Update Password	Current Password New Password New Password New Password Not Strong Enough: keep typing Password Not Strong Enough: keep typing Password not Strong Enough: keep typing Induce at least one number, uppercase letter or symbol (@#\$%/). The more unique characters you add, the stronger it will be. Retype New Password	

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.

Account Settings Search Settings	Company Details Enter your company's contact details, manage	permissions and upload a logo.		
PERSONAL SETTINGS 1 Profile 2 Security T Accounts	Company Information and Permissions Add or update your company contact Information and manage permissions.	Company Name Bickers & Bickers LLP Email Domains 1/2storage.com. banit.me, cic	Phone Number 555-672-9087	il Save
APP SETTINGS © Displey A Notifications © Video Conferencing		External Collaboration External Collaboration Trip permation allow account of the power of the	nabled Id video	
CRGANIZATION SETTINGS Company Details Divisions Units		Password Expiration Policy This permission forces users to chai Days 0	nge their password after a set number of	daya.
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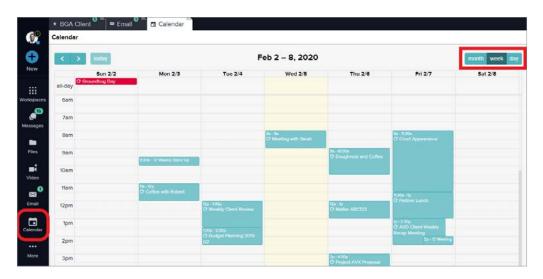
MANAGE EMAIL DOMAINS

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 <u>support ticket</u>.*

Account Settings Search Settings	Company Details Enter your company's contact details, manage	permissions and upload a logo.		×
PERSONAL SETTINGS Profile Security Accounts APP SETTINGS Displey Notifications Vide Conferencing	Company Information and Permissions Add or update your company contact information and manage permissions.	Company Nome Bickers & Bickers LLP Email Domains 12storage com, banit.me, cit External Collaboration External Collaboration is en 70% permission allows messaging an conferencip with users coaling an	id video	Save
ORGANIZATION SETTINGS A Company Details Divisions Users		Password Expiration Policy This permission forces users to char DBy5 0	nge their password after a set number	of days

CALENDAR / EMAIL

Go to *Settings*, then *Apps* and then click *Enable Integration* 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 <u>support ticket</u> if your Company does not use Office 365 and you would like to discuss a potential integration.*



Email - Inbox (1)		
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Brian Stearns Professional services content 0130/2020 9:01 em	Attachments	C
Jayce, Please feel free to use the attached deck as a leave behind in your meeting. #organized #integrated # collaborative Best, Brian Brian S.	Outline.docx ***	
Stearns Chief Commercial Officer 0: (312) 248-9010 M: (312) 576-1076 E: bstearns@workstorm.	Sent: 10/15/2019 12:31 pm	Re
Brian Stearns Updated pitch proposal 01/24/2020 9:50 am	From: Robert Jackson To: Joyce Rose Subject: FW: ACME Matter - weekly diligence coll	Fo
Hi Joyce, Here is the latest proposal for our collaboration on ACME Corp. Lets discuss when you have time. Regards, Brian Brian S. Stearns Chief Commercial Officer 0: (312) 248-9010 M: (312) 576- 1076 E: bateming@winktorm.com https://wo 1076 E: bateming@winktorm.com.https://wo	Joyce, the client has asked that we arrange weekly calls to go over diligence findings. Lets find time to	
Robert Jackson FW: ACME Matter - weekly dilige 1015/2019 12:31 pm Joyce, the client has esked that we arrange weekly	review the attached outline before our call. Regards,	D
calls to go over diligence findings. Lets find time to review the attached outline before our call. Regards,	Robert	Mark
Robert Robert Jackson Partner, Corporate Transactions O: (312) 298-9010	Robert Jackson Partner, Corporate Transactions	
Brian Stearns Good luck on the call today! 07/23/2019 10:35 am	0 : (312) 298-9010	
Joyce, I know you'll impress! Thanks, Brian Brian S. Stearns Chief Commercial Officer O: (312) 248-9010 M: (312) 576-1026 F: bataans@www.katorm.com	M: (312) 586-1076	

EXTERNAL COLLABORATION SETTINGS

Go to *Settings*, then *Company Details* and click the **O** toggle to allow Company members to invite and collaborate with External members.

Account Settings Search Settings	Company Details Enter your company's contact details, manage	e permissions and upload a logo.		×
PERSONAL SETTINGS 1. Profile 2. Security T. Accounts	Company Information and Permissions Add or update your company contact information and manage permissions.	Company Name Bickers & Bickers LLP Emell Domeins 12storage com, bank me, ck	Phone Number 555-672-9007	A Save
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ORGANIZATION SETTINGS		Password Expiration Policy This permission forces users to char Doys 0	nge their password after a set number o	rf days.

GIPHY PERMISSIONS

Go to Settings, then Apps and click Enable Integration.

Account Settings Search Settings	Apps Enable and disable current apps that are integrated with your company's Workstorm account. Please contact your Workstorm Account R like to discuss edding edditional apps.	× ep if you would
PERSONAL SETTINGS	IManage Integration Encoded Connect Workstorm with your Manage account to access your Workspaces, files and content related to your ongoing Matters.	O Settings thats trapsfor
 Security T Accounts 	Connect Workstorm with your Dropbox account to access your stored files and share them with your colleogues.	them objects
APP SETTINGS © Display A Notifications Video Conferencing	Email/Calendar Integration Enabled Access your inbox, compose new emails, create and share events and view your daily, weekly and monthly schedule with Workstorm's Email and Calendar integration.	Scatter Hingston
ORGANIZATION SETTINGS	Giphy Integration (Enables) Spice up your conversation by sharing short video messages with your colleagues.	Dume interview
A. Divisions Users X integrations Apps Analytics		

PASSWORD POLICY

Go to *Settings*, then *Company Details* and use the provided text box to set a password expiration policy for all members. Pick a number of days until member passwords will expire.

Search Settings	Company Details Enter your company's contact details, manage	permissions and upload a logo.		
ERSONAL SETTINGS 1. Profile 9. Security	Company Information and Permissions Add or update your company contect.	Company Name Bickers & Bickers LLP		
T Accounts	information and manage permissions.	Email Domains 12storage.com, banit.me, clc	Phone Number 555-672-9087	🕒 Save
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RGANIZATION SETTINGS		Password Expiration Policy This permission forces users to cho Days 30	nge their password after a set number of days.	

TWO FACTOR AUTHENTICATION

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

Account Settings	Company Details			
Search Settings	Enter your company's contact details, manage	permissions and upload a logo.		
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1 Profile	Permissions Add or update your company contact	Bickers & Bickers LLP		
Security T Accounts	information and manage permissions.	Email Domains	Phone Number	
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P SETTINGS Display		External Collaboration		
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Apps		Two factor authentication i		
Analytics		This permission controls the use of tw Recovery by one-time code	io factor authentication across the whole com a is allowed	pany
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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.

Account Settings	Users Add or update users for your company.			
Search Settings				
	User Information			0
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T Accounts	+ New User			Filters
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PP SETTINGS				Full Members
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Analytics		0	Neil Gomez	Full Member
🖶 Plan & Payment				
		0 🕨	Becky Gonzalez	User Stetus Full Member
			Robert Jackson	Full Member
Log Out				

MANAGE ADMINISTRATORS

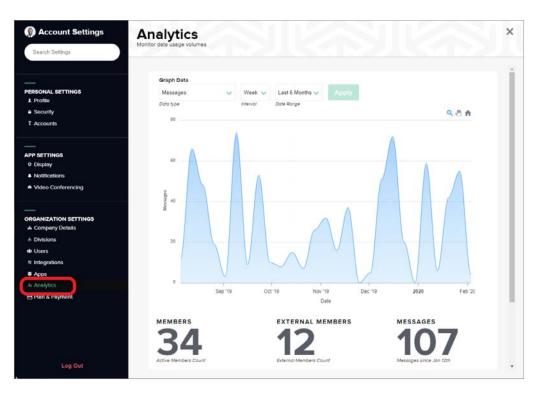
Select *Users* under Organization Settings, and then click on *Filter Users* and *Full Members*. Search for or scroll down to the colleague you wish to make a Site Admin. Click the dropdown to the left of their name, toggle on Admin () and click save to confirm the user status change.

Account Settings Search Settings	Users Add or update users for your company.				×
PERSONAL SETTINGS	User Information Invite a single user or upload a list of users. + New User	Select	All Action V Search	Users 👼	
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de Users			User Permissions		
integrations			Admin		
Ø Apps					
Analytics				Block Katherine	
🖶 Pian & Payment					

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.

Account Settings Search Settings	Users Add or update users for your company.		×
PERSONAL SETTINGS A. Profile a. Security T. Accounts	User Information Invite a single user or upload a list of users. + New User	Select All Action Search Users Filter There are 03 users	
APP SETTINGS © Displey A Notifications = Video Conferencing	Upload CSV File Download Template	Becky Gonzalez	
ORGANIZATION SETTINGS		Gonzalect Genete Send Invite	

INVITE MEMBERS IN BULK

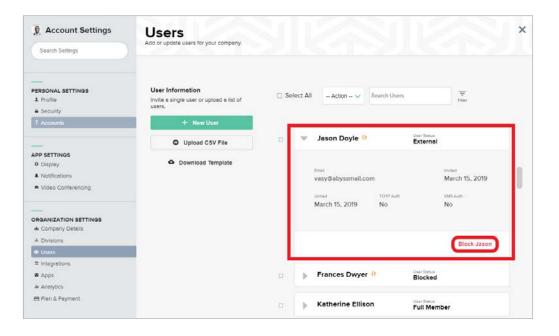
Select *Settings*, and then *Users* under *Organization Settings*. Click *Download Template* to obtain a formatted spreadsheet to invite multiple members. Enter the new company member details into the spreadsheet. Save in CSV format and click *Upload CSV File*. Once uploaded, the invitees will be moved 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.

Profile Security	Invite a single user or upload a list of users.	Sel	ect All	Action 🗸	Search Users		77 Filter
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	O Upload CSV File	Full Me	embers ×				
O Display	Download Template	0		Craig Andrews		Full Member	
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ORGANIZATION SETTINGS			1.1	Jennifer Conw	ay	Uner Stetus Full Member	
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Divisions			1	(atherine Ellis	on	User Status Full Member	

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.

Account Settings Search Settings	Users Add or update users for your company.		SJ;
PERSONAL SETTINOS 4 Profile 9 Security T Accounts	User Information Invite a single user or upload a list of users. + New User	Select All Action> Search Users Filters Filters	×
	Upload CSV File	Full Members × Admin Members × User Status	1
APP SETTINGS O Display A Notifications	Download Template	Craig Andrews Full Members Invited Pending	
 Video Conferencing 		Andrew Christensen External Member Blocked Member Admin Members	ers
ORGANIZATION SETTINGS		Jennifer Conway Multi Factor Auther Any MFA	ntication
Divisions Users Integrations		Katherine Ellison TOTP MFA SMS MFA Reset requested	1
Apps Analytics		Grace Evans Full Member	
🖻 Pion & Poyment		Sarah Evans	

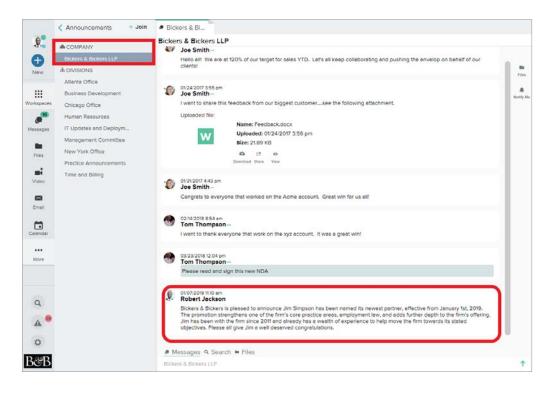


ANNOUNCEMENTS

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

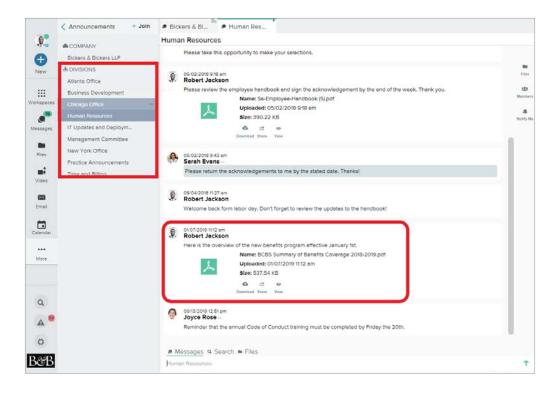
COMPANY ANNOUNCEMENTS

Select *Announcements* from your left side bar or *More* menu, then Company. Type a message to send out a new announcement to all Internal company members.



DIVISION ANNOUNCEMENTS

Select Announcements from your left side bar or More menu, 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 result is icon to upload files. Click the result 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.

Account Settings		sions te divisions for your company. This feature is used for sending announcements to select groups of users.
Search Settings	Add of upde	re unisions to your company, this reduce is used for sending announcements to serect groups of users.
	Select	All -Action - V
PERSONAL SETTINGS		
Security T Accounts	•	VYZ Office
APP SETTINGS © Displey		Division Name (required) XYZ Office Create Division Members Search members
Notifications Video Conferencing		Robert Jackson State Jackson Joyce Rose : O Admin
ORGANIZATION SETTINGS		Atlanta Office
Divisions		P Adama Onice
integrations Apps		Business Development
Analytics		Chicago Office
		Human Resources
	•	IT Updates and Deployments
Log Out	o	Management Committee

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 <u>Member Guide</u> 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 <u>here</u> to create a support ticket or to provide product feedback.