Zoho WorkDrive

Getting Started Guide for Team Admins

Set up your team in Zoho WorkDrive to connect with your co-workers quickly and easily. As a Team Admin, you can add and invite new members, organize files into Team Folders, and assign roles. Take complete control over your team activities from the Admin Console.

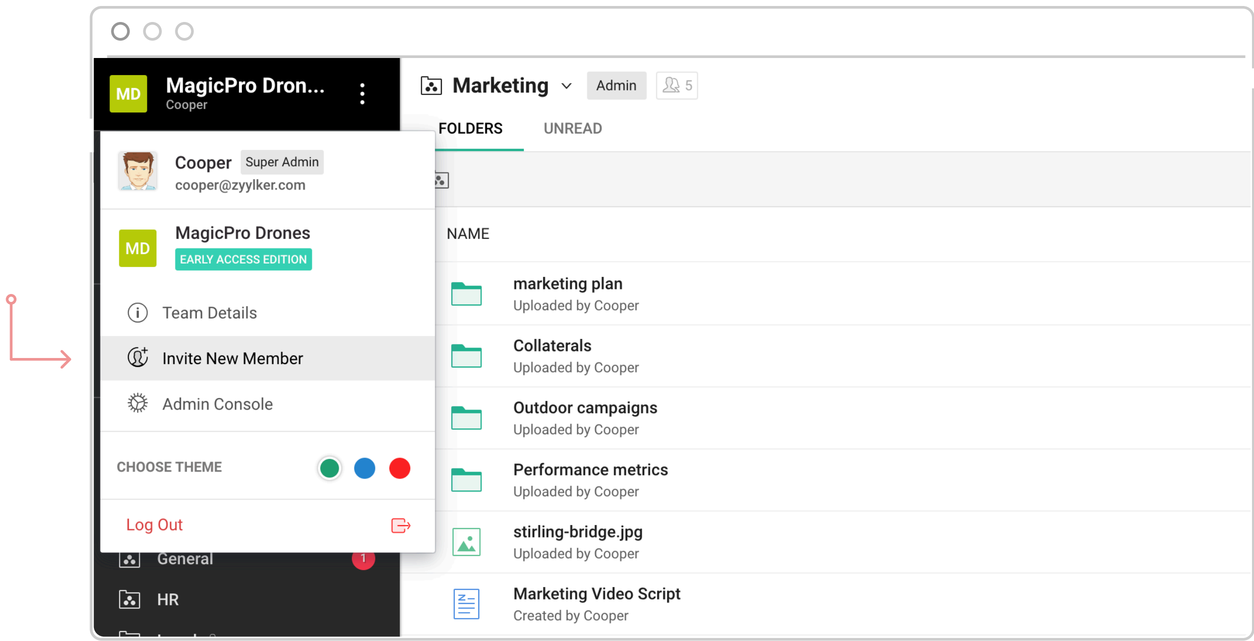
This document will help you do the following:

Add Members to Your Team

Invite people to your team to exchange ideas and work together. Enter team members' email addresses and assign each person a team role (admin or member), either individually or invite multiple people with the same role at once.

To add or invite members to your teams:

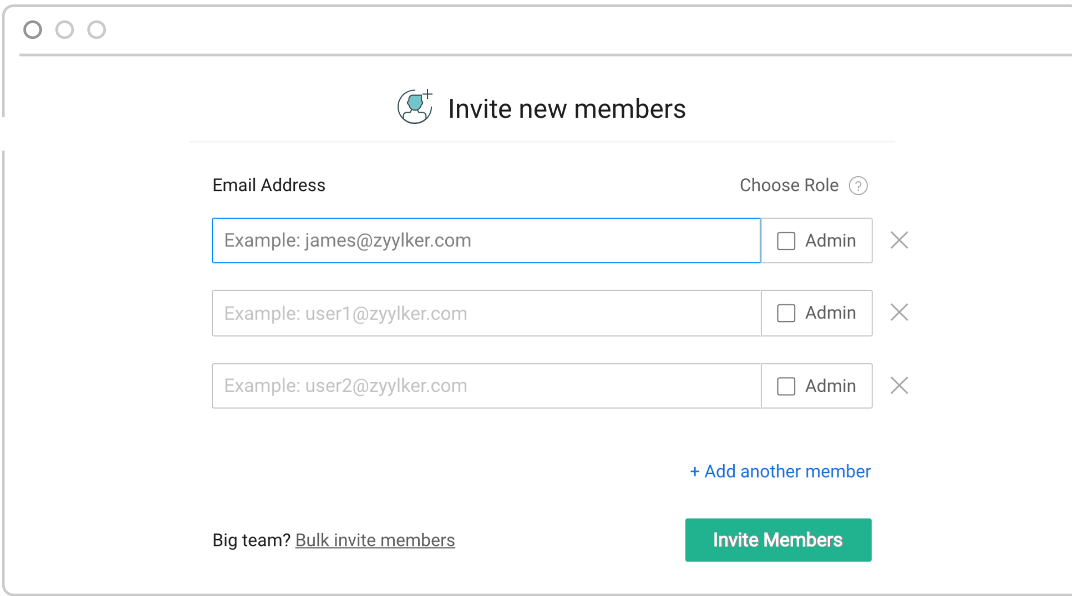
1. Click your team name in the left pane and select **Invite New Members** from the dropdown.



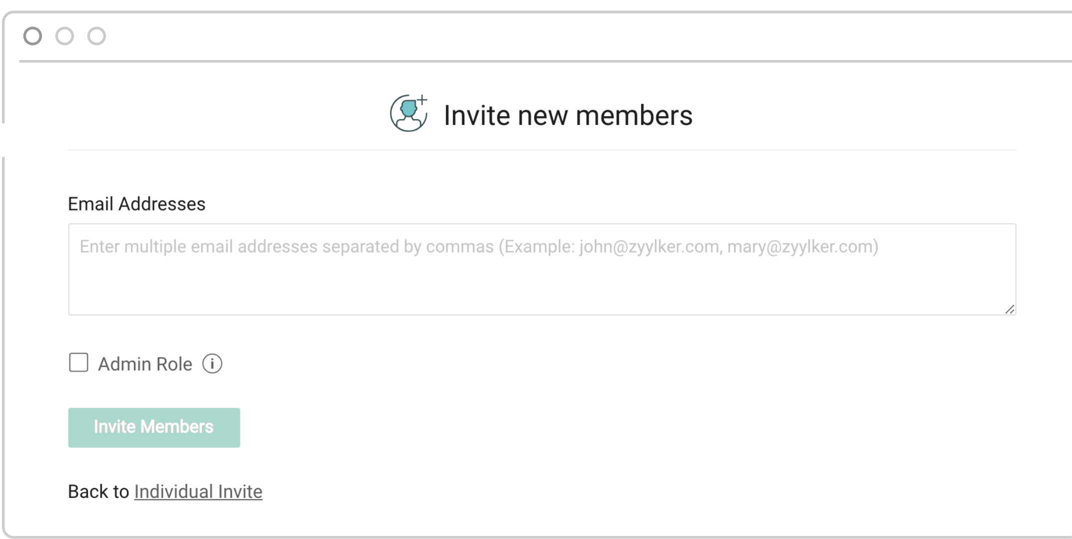
Alternatively, you can also select Admin Console from the resulting dropdown. Select Members in the left pane and click Invite Members in the top right corner.

2. Assign a team role in any of the following ways:

a. **To invite people with different roles** - Enter the email address of the person you want to invite. By default, the person you're going to invite will become a team member. Mark the check box to assign the Admin role to anyone you invite. Click **+ Add another member** and enter the details individually for each person to invite.



b. **To invite people with same role** - Click **Bulk Invite Members** in the bottom left corner. Enter the email addresses separated by commas and choose a role to assign to all new members.



3. Finally, click **Invite Members**. Your invitees will receive an email and will need to accept the invitation in order to join the team.

Create a Team Folder

Create Team Folders to organize your team's work. A Team Folder is a shared space for team members to create, upload, and collaborate on files related to a specific department, project, or idea. Team member roles enable members to collaborate in different ways:

The roles in a Team Folder

1. **Admin** - The creator of the Team Folder is the Admin by default. Only an admin can grant the Admin role to other members of the Team Folder. The Admin has full rights to manage files, members, and control settings in the Team Folder.

2. **Organizer** - Can organize, share, create, upload, and edit files and manage members.

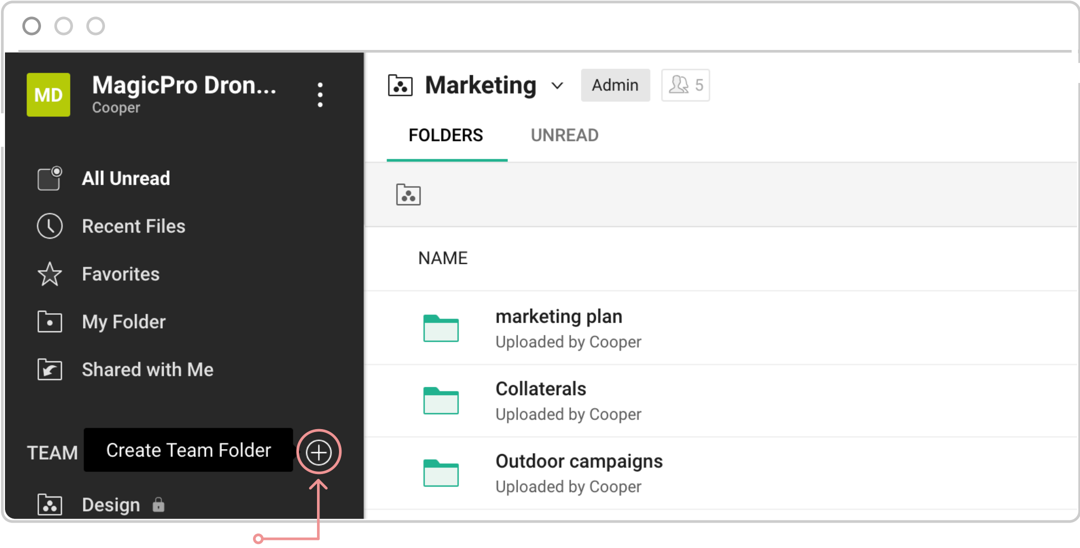
3. **Editor** - Can create, upload, edit, and comment on files.

4. **Viewer** - Can view and comment on files.

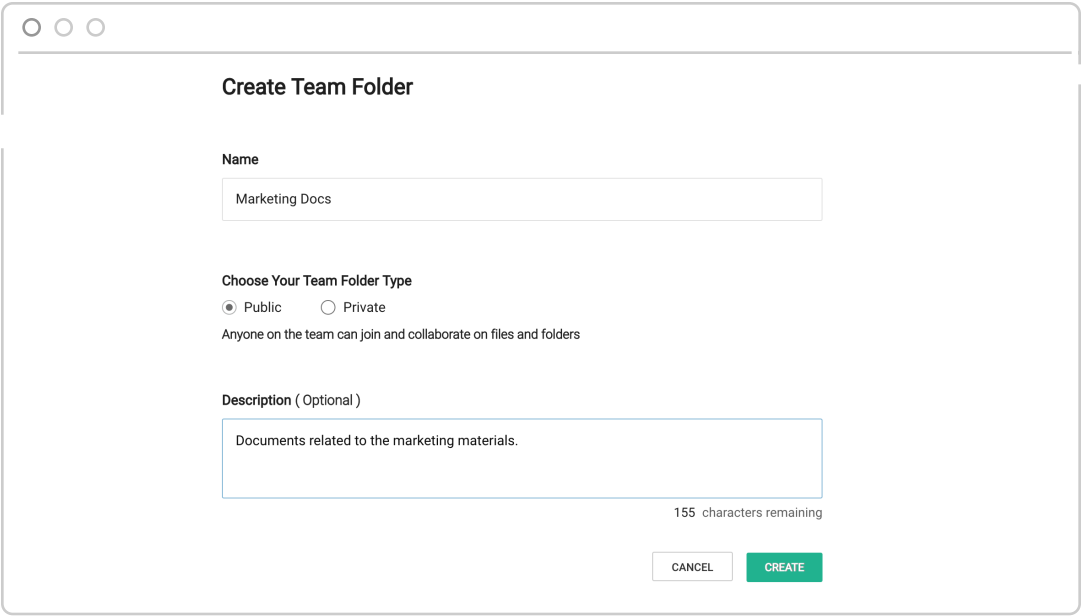
You can either create Team Folders for your team to organize files or allow members to create Team Folders when they join your team. To start off, you can create a Public Team Folder for all team members to access common resource files.

To create a Team Folder:

1. Click the '**+**' sign next to Team Folders in the left panel.

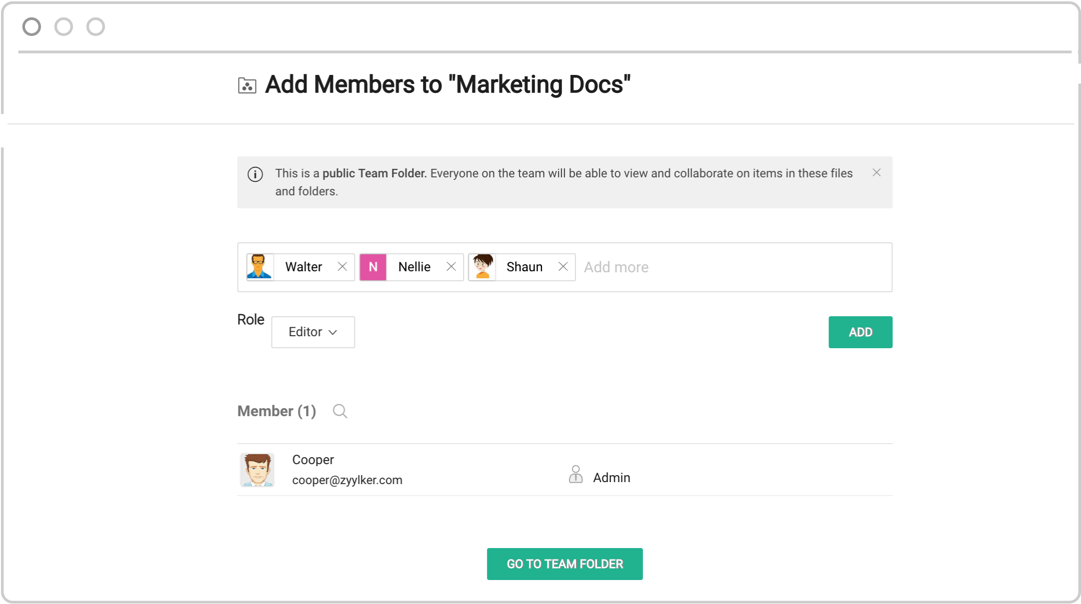


2. Enter the name of your Team Folder and select the type of Team Folder you want to create. You can also give a short description for it.



3. Click **Create**.

4. **Optional:** You can either add members to your Team Folder at this point or click **Go to Team Folder** and add team members later. To add members now, enter email addresses, assign roles, then click **Add**.



a. Use Public Team Folders for sharing general information.

b. Create Private Team Folders for selected members to collaborate on tasks or projects that not all team members are involved in.

Add Files to Your Team Folder

Create files and folders to work on team projects and collaborate with your team members.

To create a file or folder:

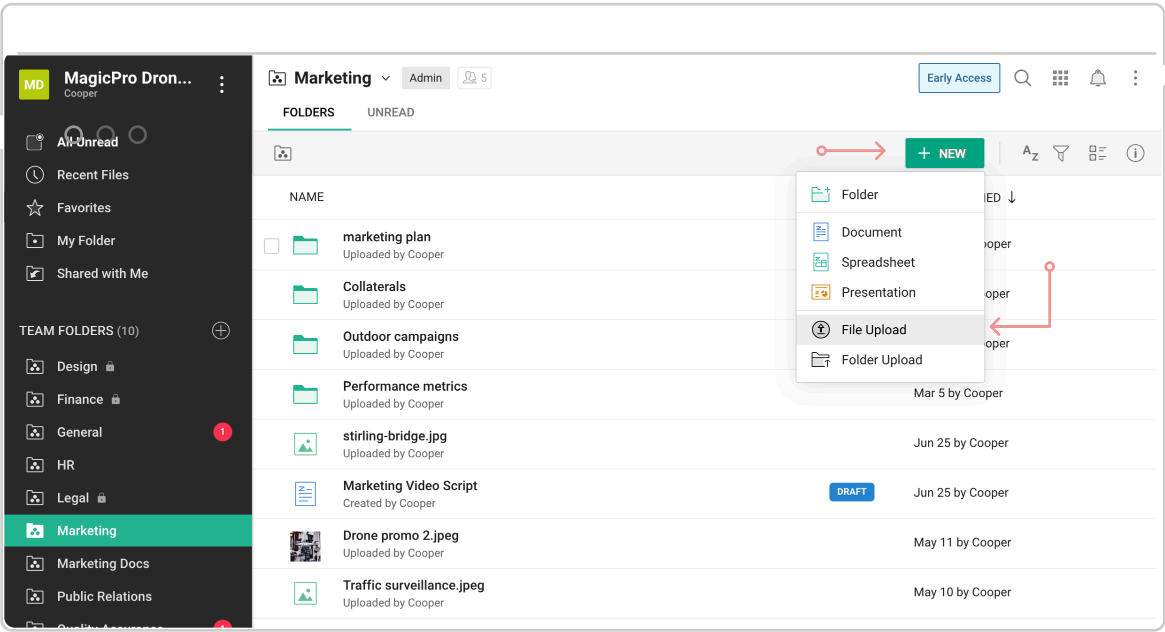
1. Click the **Folders** tab in your Team Folder.

2. Click the **+ New** button in the top menu bar

    a. **To create a file** - Select the type of file you want to create **(Document, Spreadsheet, or Presentation)**.

    b. **To create a folder** - Select **Folder** from the dropdown menu. Type in a name and press **Enter**.

    c. **To upload a file/folder** -Select **File Upload/Folder Upload** from the dropdown menu. Select the file/folder to upload and click **Open**. Alternatively, you can drag and drop files from your computer.



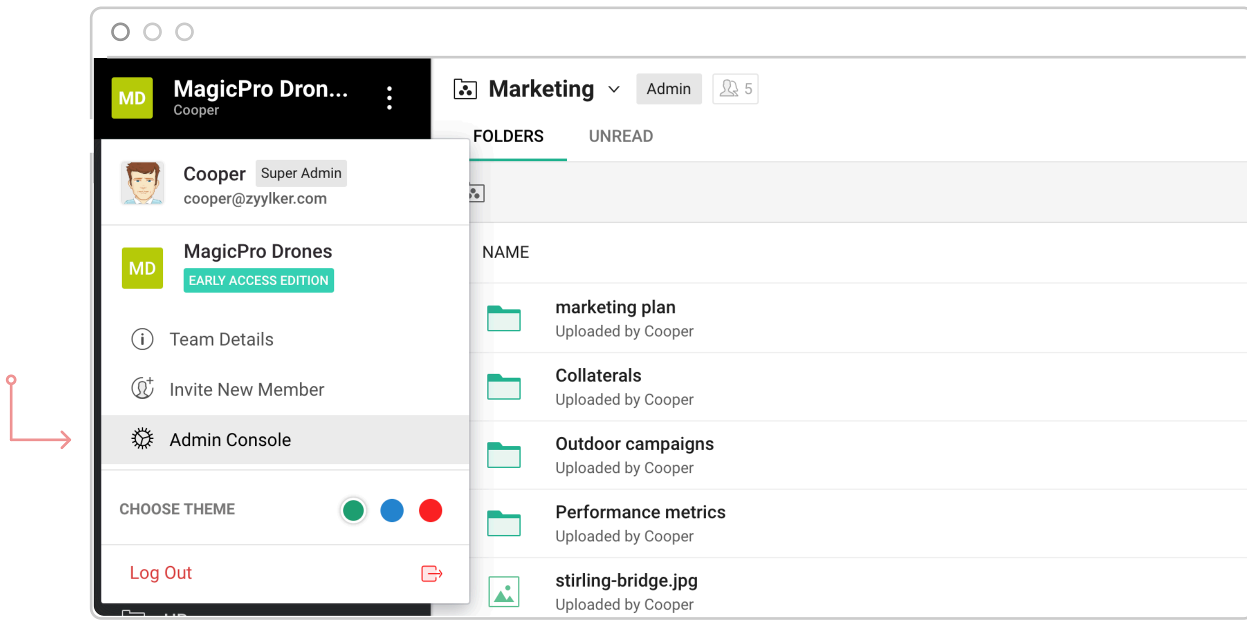
Newly created Zoho Office Suite files in a Team Folder are called 'Drafts'. Drafts remain invisible to other members in the Team Folder until you click the 'Mark as Complete' option. This feature gives you the time and freedom to work on your first drafts without others commenting on it too soon.

Configure the Admin Console

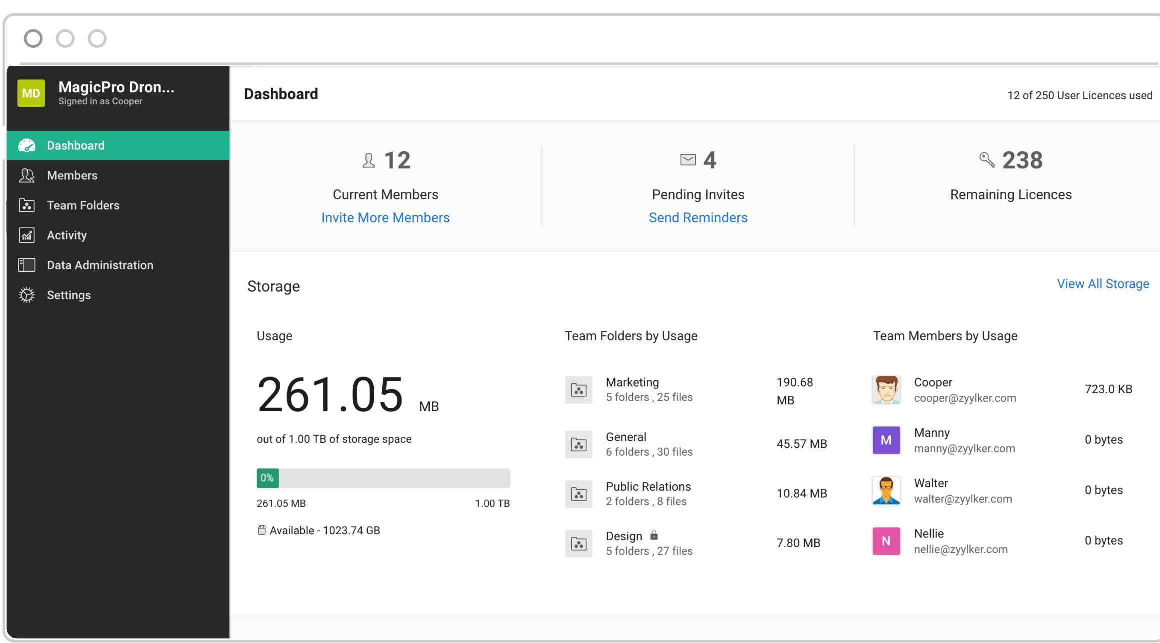
Monitor and track all the activities of your team using the Admin Console. The Admin Console acts as the control center for a Team admin.

To access your admin console:

1. Click your team name in the left pane.



2. Select **Admin Console**. You will see five tabs:



1. **Dashboard** - Get an overview of your team's storage, members, and files.

2. **Members** - Invite members to your team, change their roles, and suspend or remove members.

3. **Data Administration** - Access and manage all of your team's files. Track activity on shared files, restore deleted files and Team Folders, and take control over any file if necessary.

4. **Activity** - Generate activity reports to keep track of what's happening in your team. Use filters and customize the parameters to create each report.

5. **Settings** - Take control over some basic functions of your team. To get started, you can set these up even before you invite members to your team.

   a. **File conversion:** Switch this on to convert all files uploaded to your team account to Zoho WorkDrive format.

   b. **Team Folder creation:** Select who can create Public Team Folders: only Admins or all team members.

   c. **External sharing setup:** Turn this setting on to let team members share files outside your team.

Create, collaborate and make work happen :)