Admin Panel

We'll show you how easy it is to get up and running with LifeWorks

using the Admin Panel: **https://admin.lifeworks.com/**

LifeWorks
by Morneau Shepell

We're thrilled that you've chosen LifeWorks – the unified platform for Total Well-being! It's time to personalize your network and invite your organization's colleagues to access this powerful platform (online by browser or by mobile app for iOS or Android). We've designed this Admin Panel Guide so you can have everyone up and running on LifeWorks in no time. Let's get started!

Adding company branding & logos

Brand your LifeWorks network! Add logos and update the Nickname to personalize your network and help colleagues feel at home.
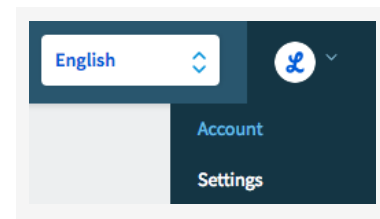
1. Go to "Settings" from the drop-down menu in the top right corner.

2. Choose "Edit information" at the bottom of the page.

3. You can upload country and language specific branding by selecting the appropriate country in the "Appearance" section on the left-hand side.

    The Nickname is how your organization name will appear throughout the LifeWorks platform and in our communications with your colleagues.

Choose a Nickname that reflects best how your employees refer to your organization and that aligns with your brand. There is a 20-character limit for the Nickname.

Your organization's graphic design or marketing teams should be able to assist you with obtaining logos as per the following specifications:

1. Your Company Logo will be displayed in the top navigation of the platform. The image must be in

either .jpg/.jpeg or .png format and dimensions must be 600 x 180 pixels.

2. The Square Logo will be displayed on the News Feed and on Company Posts. The image must be in either .jpg/.jpeg or .png format and dimensions must be 400 x 400 pixels.

3. The Cover Image is the large image featured at the top of the LifeWorks News Feed on the Web app. Choose an image that reflects your industry/field or your organization's personality. The image must be in either .jpg/.jpeg or .png format and dimensions must be 1440 x 300 pixels.

Tip: We recommend against using logos or text in the Cover Image. The Cover Image will be cropped differently across devices of varying screen sizes and may not conform to your branding guidelines on all screen sizes.

Inviting Colleagues

You've personalized your LifeWorks platform. Now let's invite your colleagues! Follow the instructions below to send an invitation to everyone in your organization. Please note your invitations will go out immediately.

From the top navigation pane go to Colleagues > Manage Colleagues. Send an Invitation using the Add New Joiner Feature:
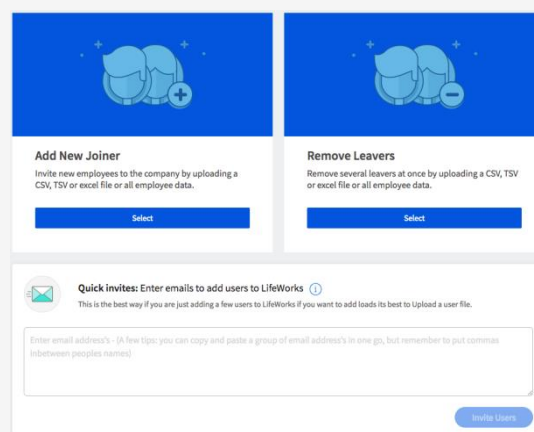
1. The Add New Joiner option allows you to add joiners in bulk via .csv,. tsv, or Excel file. Select "Import all Colleague Data", then follow the on-screen instructions (below).

Upload file: Drag and drop a file into the uploader or select " Upload File" to browse your computer for the appropriate file.
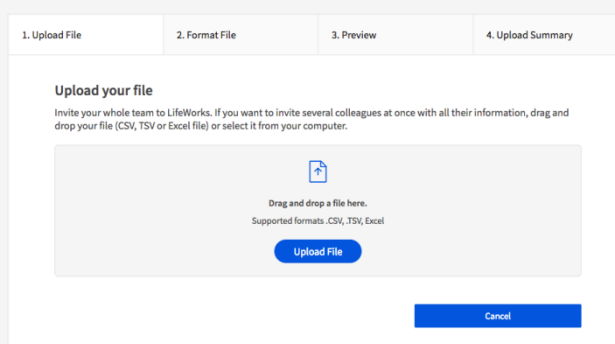
Format file: Use the drop-down options above each column that match the appropriate headers to the data within the file. The "remove headers" checkbox will prompt the uploader to ignore any column headers present on your file. Select "Submit" upon completion.

Preview: Preview the data to ensure the correct headers are above each column, then select "Submit."
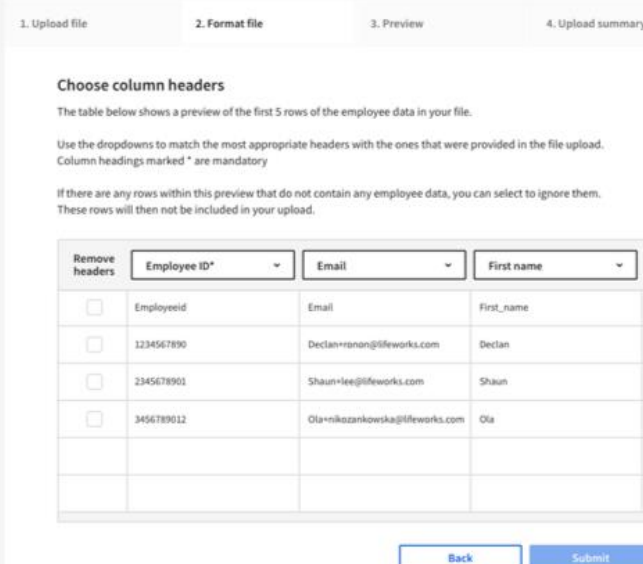
Upload summary: An Upload Summary will confirm the number of colleagues invited and highlight any errors.

Granting Admin Access

You can make other active colleagues LifeWorks Administrators by selecting their profiles from the Colleagues > View Colleagues page.

Select "Make Admin" from the "Settings" drop-down.

An email notification will be sent alerting the user to the updated access level.

Crafting Your Welcome Post

Now that you've customized your platform and invited your colleagues, you've almost finished launching LifeWorks! But first, since your News Feed is empty, let's create your first Company Post to welcome colleagues to the platform and get them started using its features.

From the Dashboard or Timeline, click on the option to "Write new post…." in the "Create new company post" module.

A new window will open where you can craft your post.

You can include images and links to increase engagement from your users.

Here's a sample Welcome Post to get you inspired:

"Welcome to LifeWorks, your brand-new well-being experience! Within LifeWorks,you can stay up-to-date with Company Posts, and take advantage of exclusive discounts and savings called Perks. You can also access a wealth of online well-being resources to support your mental, physical, social and financial well-being."

Tip: Use the Post visibility and Push Notification options to increase awareness of your Company posts.
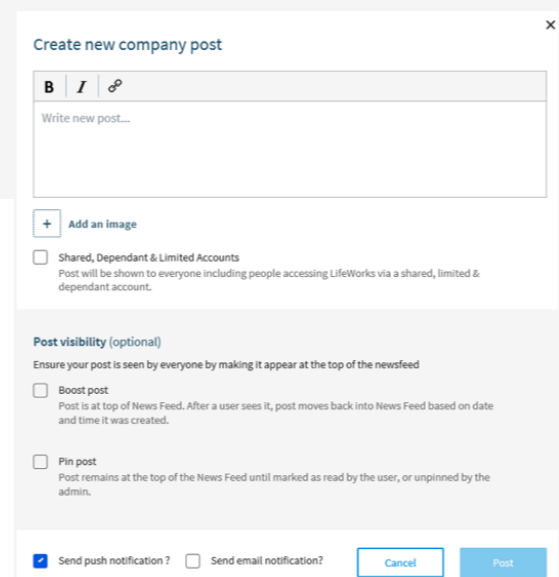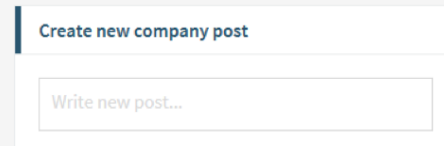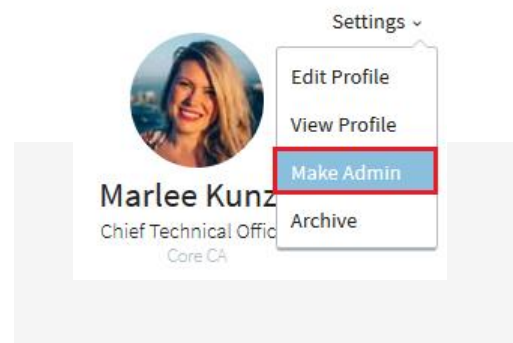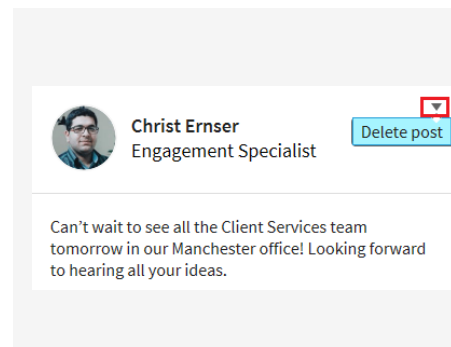
Managing Your News Feed

Stay on top of your News Feed activity by going to the "Timeline" section of the Admin Panel. From here, you can see all the activity on your News Feed for every month and all time. You can also filter by post type: User posts, Company posts, Recognitions, etc.

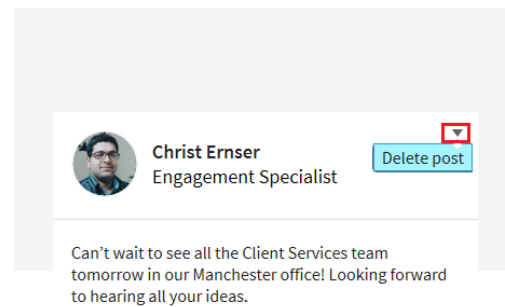**Post deletion:** In the event you would like to remove a post from your Timeline, you can do this by clicking on the triangle drop-down in the top right corner of the post, and selecting "Delete Post". The post will immediately be removed from your News Feed.

Removing Colleagues

Now that you have a better understanding of the invitation process, it's time to look at the ways you can remove people (leavers) from LifeWorks using the Admin Panel. Remove a leaver in one of two ways:

1. The Archive option allows you to deactivate a user. This individual will be immediately logged out and no longer have the option to log in to your organization's LifeWorks network.

To archive an employee, go to Colleagues > View Colleagues from the top navigation pane.

Search and select the colleague you wish to archive.

Select "Archive" from the "Settings" drop-down in the top right corner of the participant's profile.

You can also reactivate a user from the "Archived" tab under "Manage Colleagues". This could be helpful for colleagues returning to your organization after a leave or sabbatical. Find the profile in the Archived list and choose the "Reactivate" button.
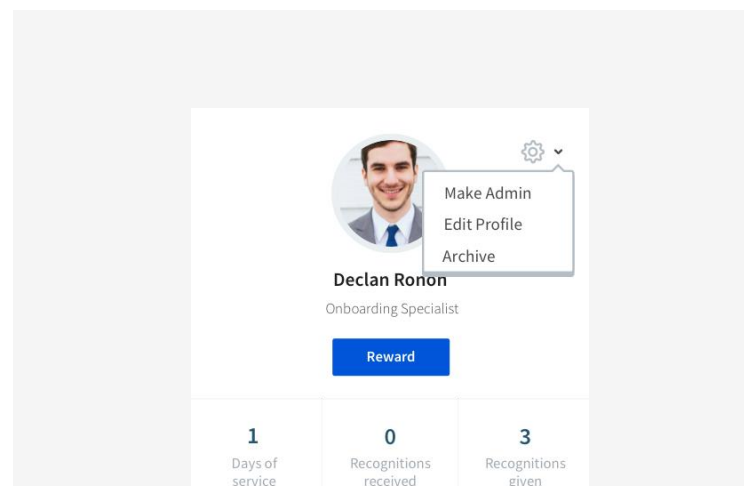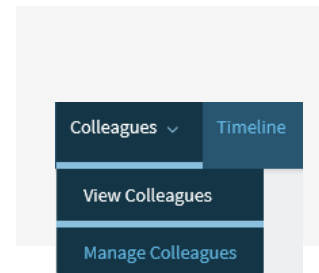
Tip: We recommend you move leavers to an Archived state for at least 90 days after they have left your organization, enabling them to retrieve any earned cashback credited to their LifeWorks wallet through the use of Perks. Archived users can submit a technical support ticket at help.lifeworks.com to retrieve any pending cashback. However, when you delete a leaver, that data is purged automatically, and our Support Team will be unable to award pending cashback.

2. The Remove Leavers option allows you to remove multiple colleagues via .csv, .tsv, or Excel file. Access this function from the top navigation pane: Colleagues > Manage Colleagues.

Select "Import all Colleague Data", then follow the on-screen instructions.

Upload file: Drag and drop a file into the uploader, or select "Upload File" to browse your computer for the appropriate file.

Format file: Use the drop-down options above each column that match the appropriate headers to the data within the file. The "remove headers" checkbox will prompt the uploader to ignore any column headers present on your file. Select "Submit" upon completion.

Preview: Preview the data to ensure the correct headers are above each column and then select "Submit."

Upload summary: An Import Summary will confirm the number of colleagues invited and highlight any errors.

Tip: Unlike the New Joiners file, the Leavers file only needs one piece of user data and this depends on how the colleagues were invited to the network – by unique ID or email.

Sounds pretty simple, right? You and your colleagues are ready to start enjoying all that LifeWorks has to offer!