



Whaller

Welcome to the sphere

Organization manager



Whaller is a **secure collaborative** and **social networking** platform that guarantees the privacy of its users' data. Thanks to an exclusive system of "spheres" (sealed, independent spaces for communication and collaboration), users can create and manage an infinite number of networks from one single account.

On Whaller, everyone masters their communications, communities and audience.

This guide is dedicated to helping **organization managers** discover the many features and options available to them.

An organization manager is a user who is in charge of administering an organization's settings, members and spheres.



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Whaller interface

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My spheres
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"Root" page (personal homepage)
- 3



Search (members)
- 4



Pending invitations
- 5




Create new spheres/organizations, invite members
- 6



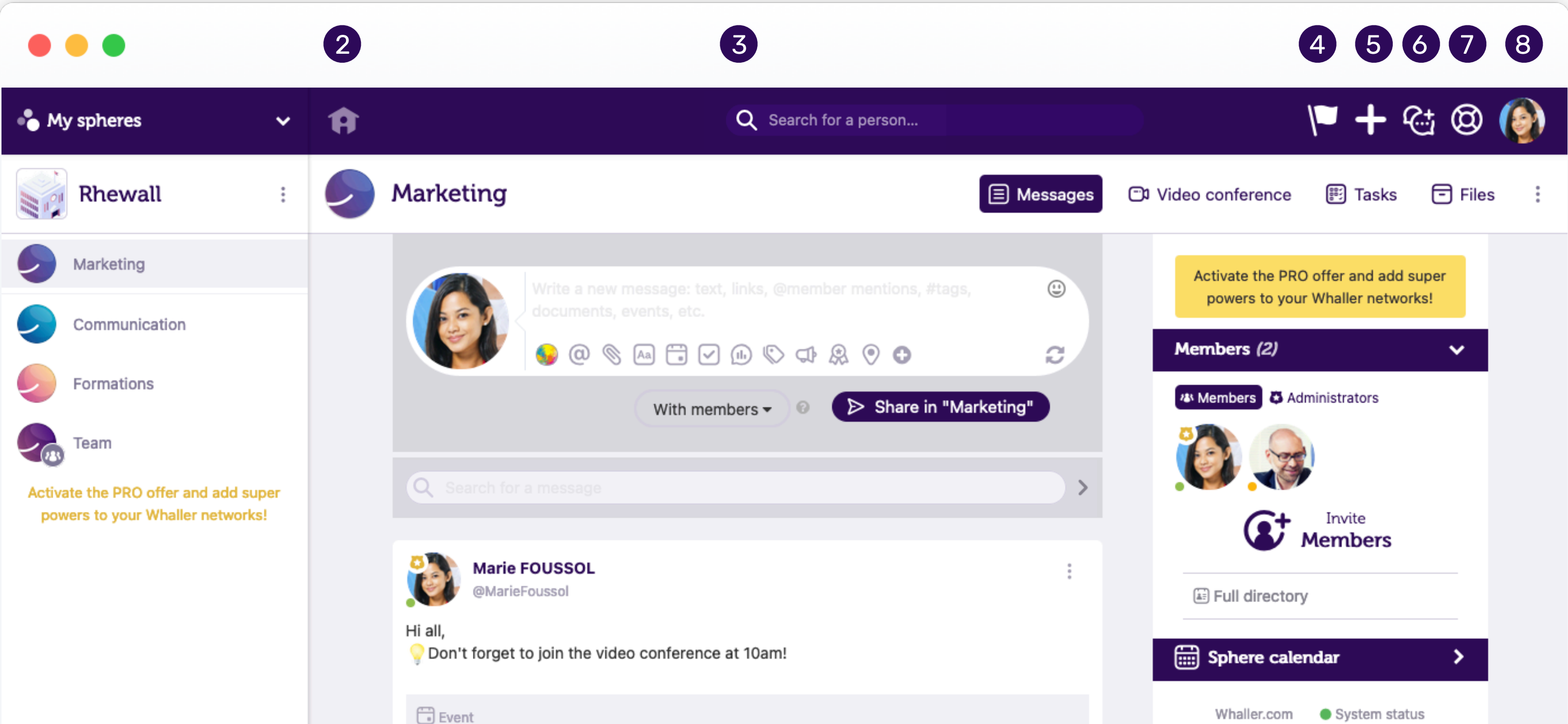
Chat
- 7













Help and resources
- 8



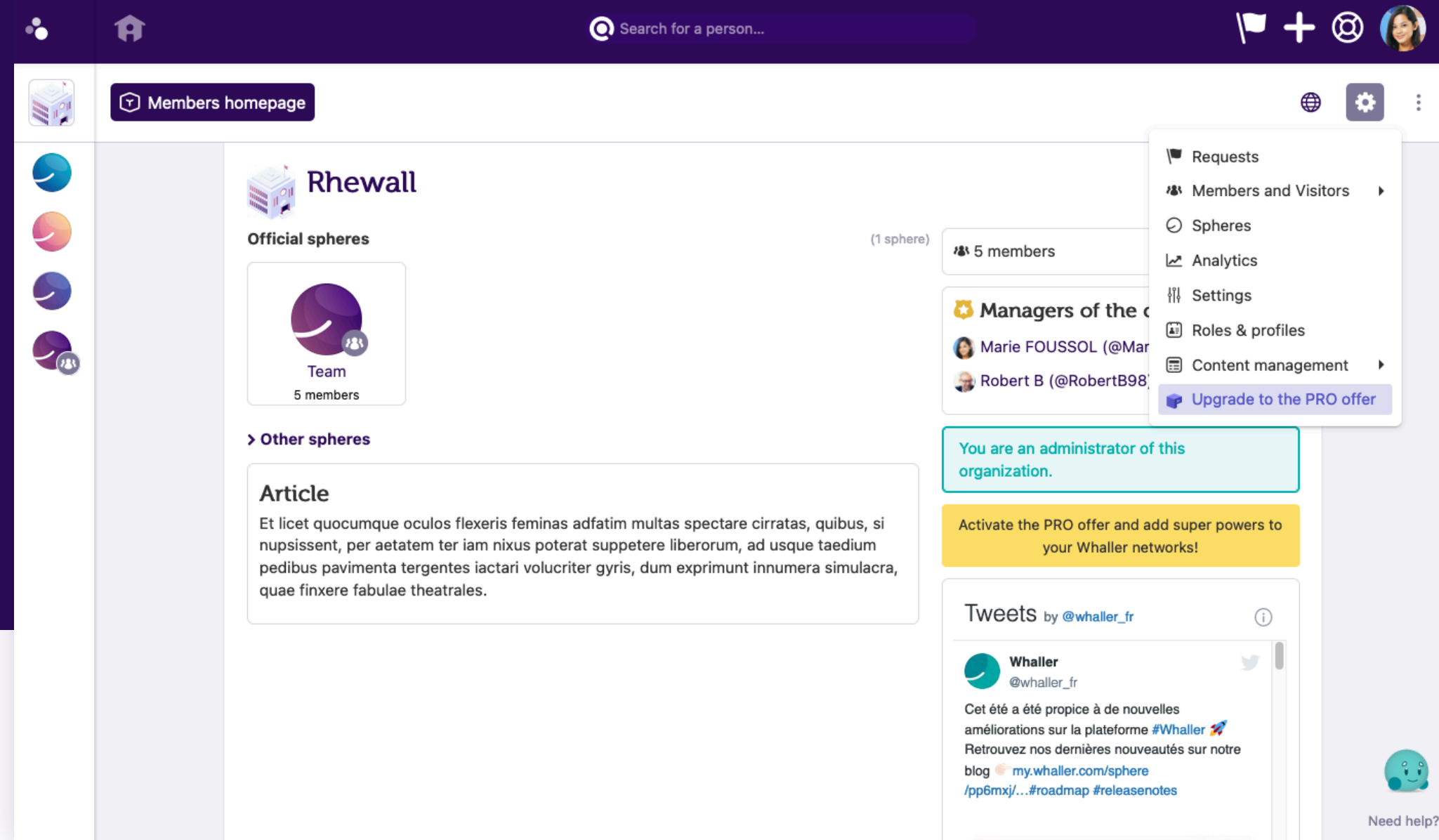
"My account" menu (personal settings and information)



Icons

-  **"My spheres"**
Allows you to have an overview of all the organizations or spheres you belong to, move from one sphere to another, see which organizations spheres belong to and access your organization portals and their admin pages.
-  **"Root" page (personal homepage)**
Accessible by clicking on the house icon. Gives you a global view of all the networks you belong to.
-  **Search (members)**
Allows you to find members in a sphere, in an organization and on Whaller, by first name, last name, email address, username or certain profile elements.
-  **Pending invitations**
When red, indicates that you have one or more invitations (to spheres or organizations) awaiting your response.
-  **Create new spheres/organizations, invite members**
Lets you create a new sphere  or organization , and invite people  to join your networks.
-  **Chat**
Visible when you're in a sphere. Allows you to start a real-time private conversation with mentioned members.
-  **Help and resources**
Provides quick access to online support, FAQ, the Whaller roadmap (list of upcoming developments), new product releases and a platform to submit suggestions for improvement.

Organization portal



The person who creates an organization is by default the [organization manager](#).

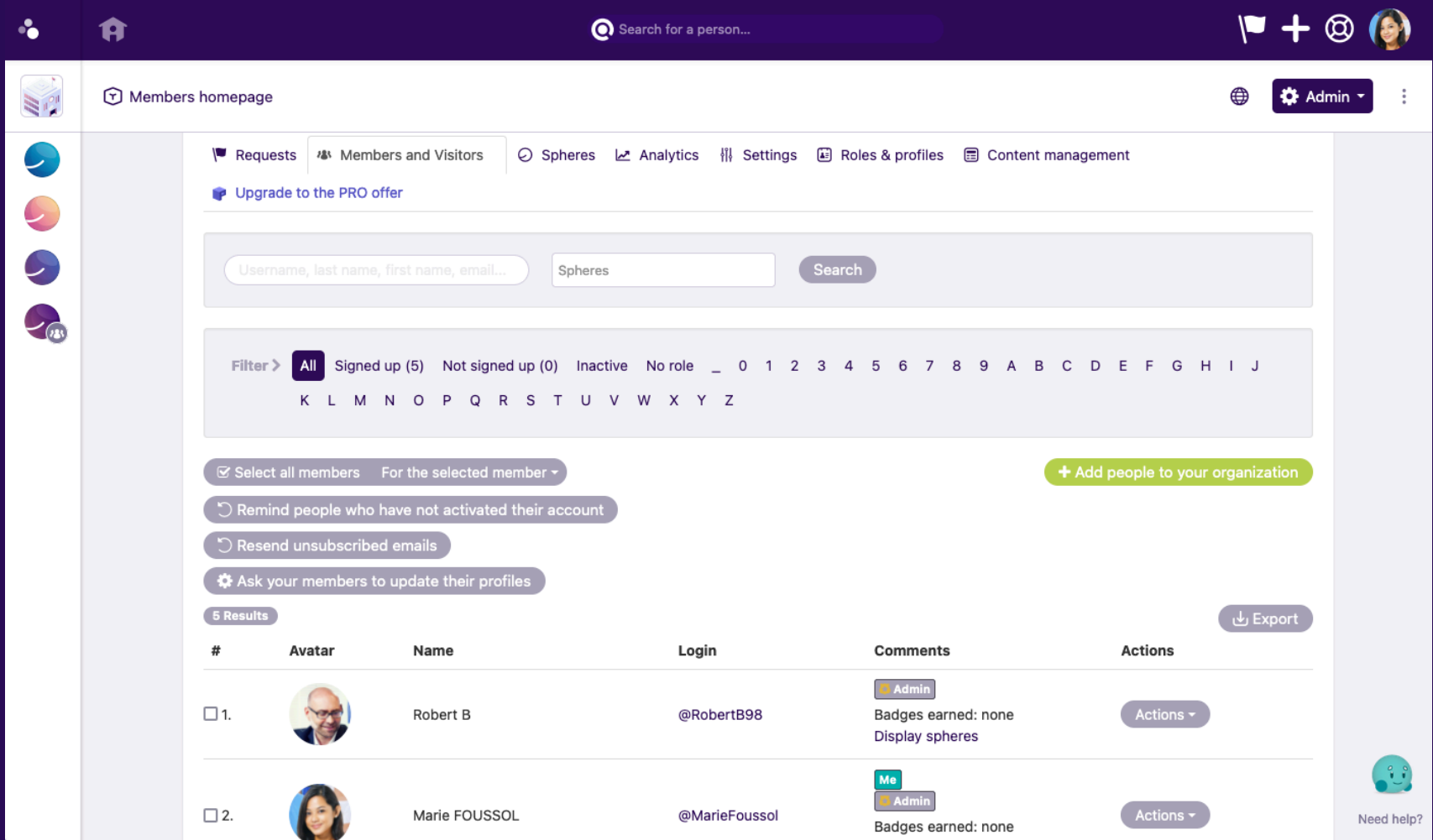
From the organization portal, organization managers can administer their network: requests, members and visitors, spheres, analytics, settings,...

They also have [access to features](#) like resource planning, badges, store, shared sphere calendar, etc., depending on the offer their organization is subscribed to.

Admin pages

In the “Admin” pages, organization managers can access and manage:

- Pending requests
- Members, visitors
- Spheres
- Analytics
- General settings
- Roles & profiles
- Widgets, CMS
- Subscription

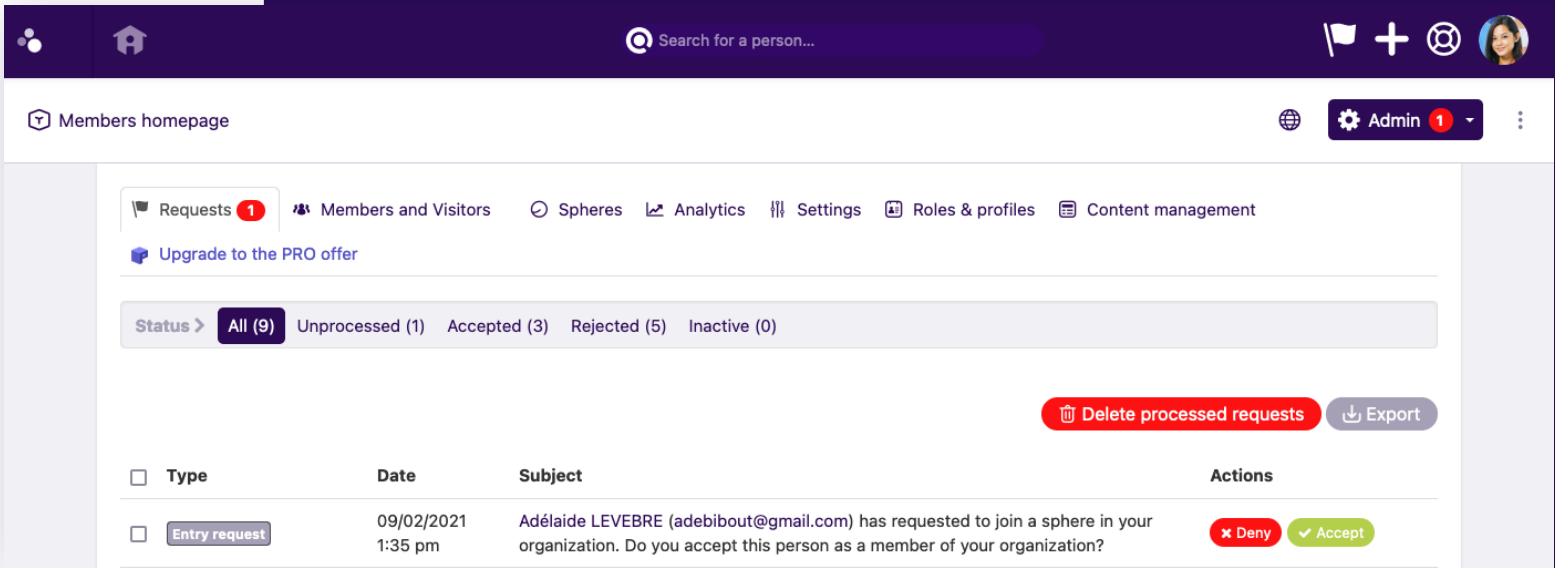
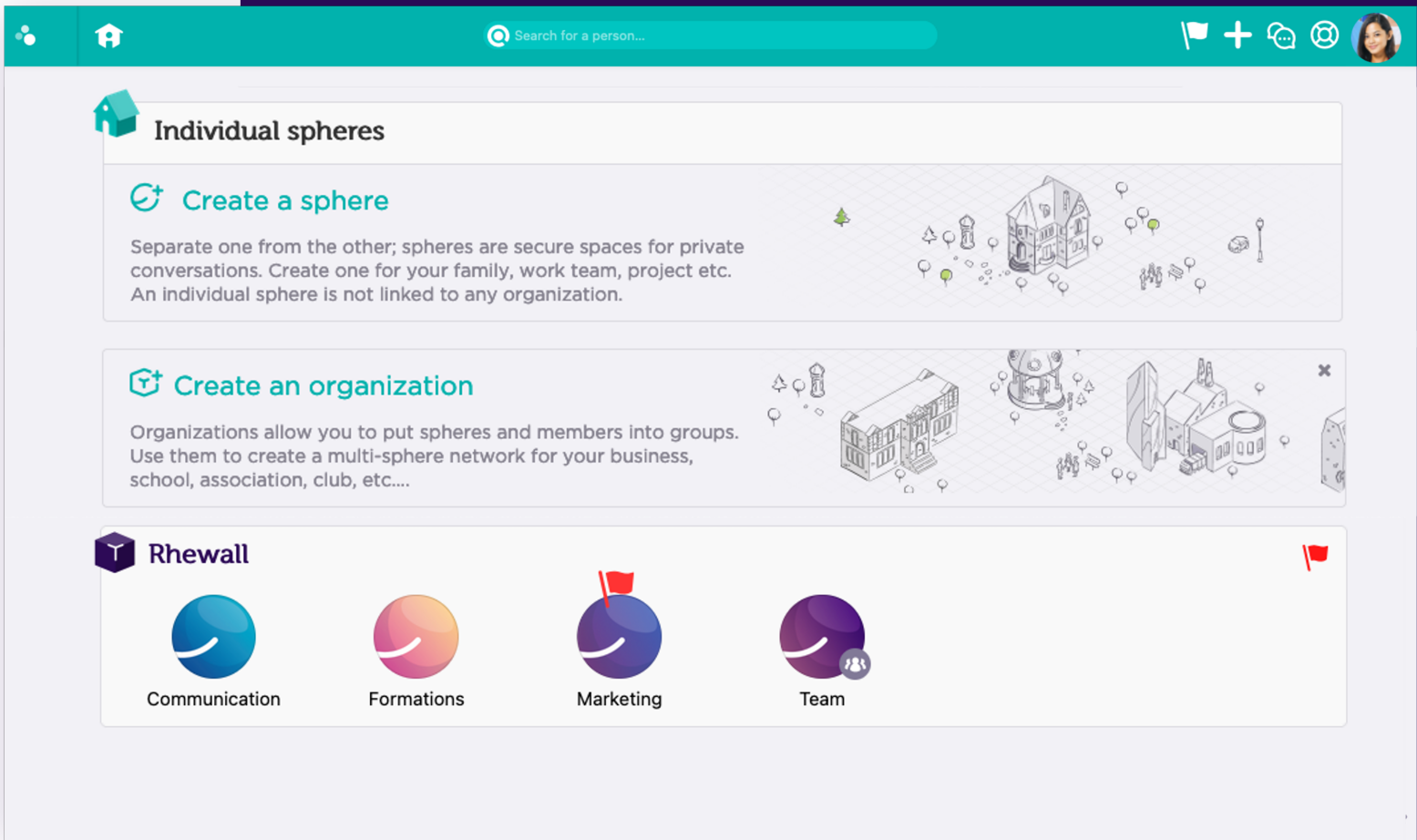


Manage requests

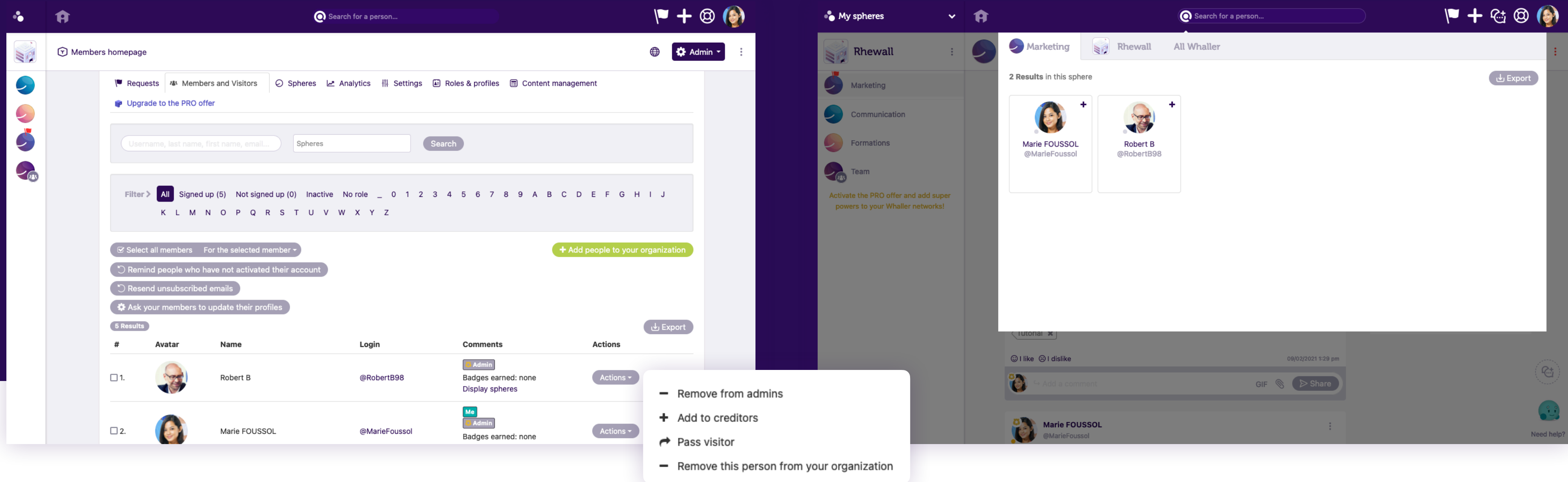
On the "Requests" page, organization managers can find all pending, accepted, refused or inactive requests to join.

For each request, they will have an overview of the invitations, which they can then **accept** or **reject**.

When someone requests to join their organization, organization managers have a **notification** on their "root" page (a red flag) and on the members portal (red dot).



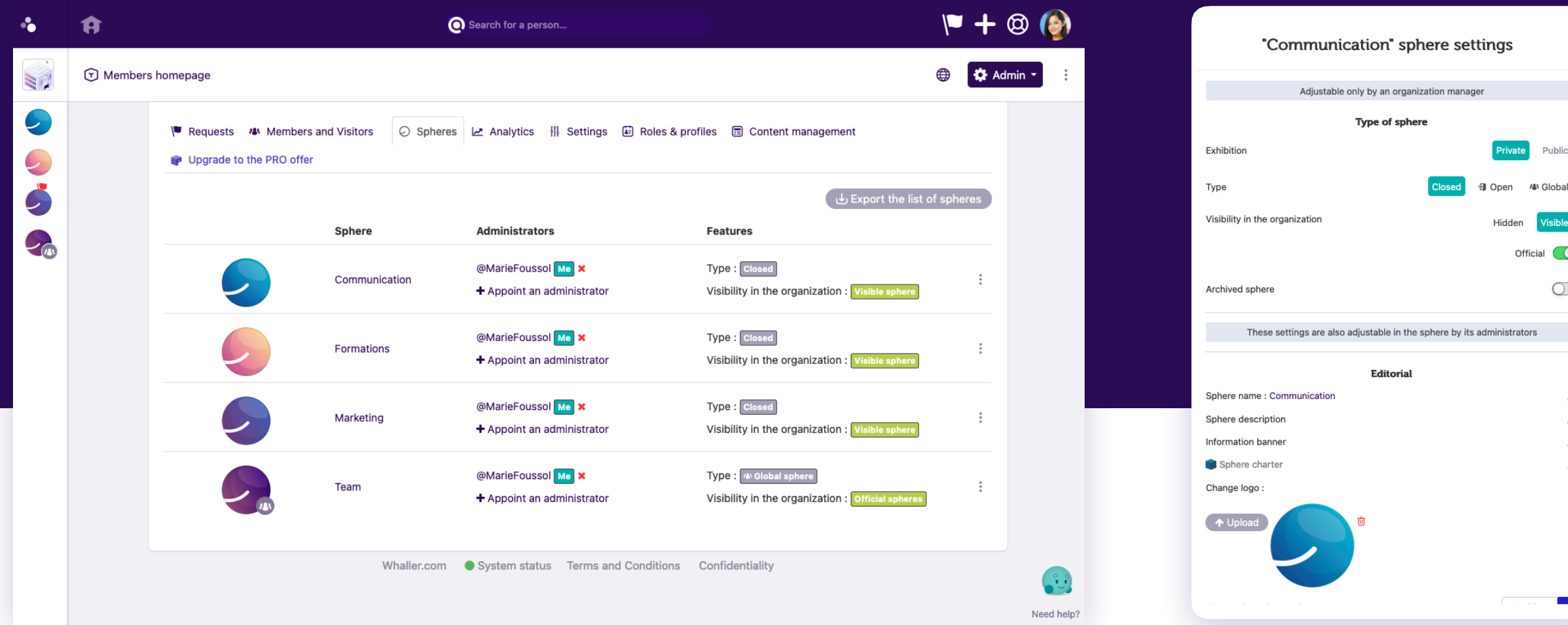
Manage members



On the “Members” page, organization managers can add or remove people, export the list of members or assign members different roles such as:

- Organization manager
- Allocator 
- Visitor 
- A custom role they have created 

Manage spheres



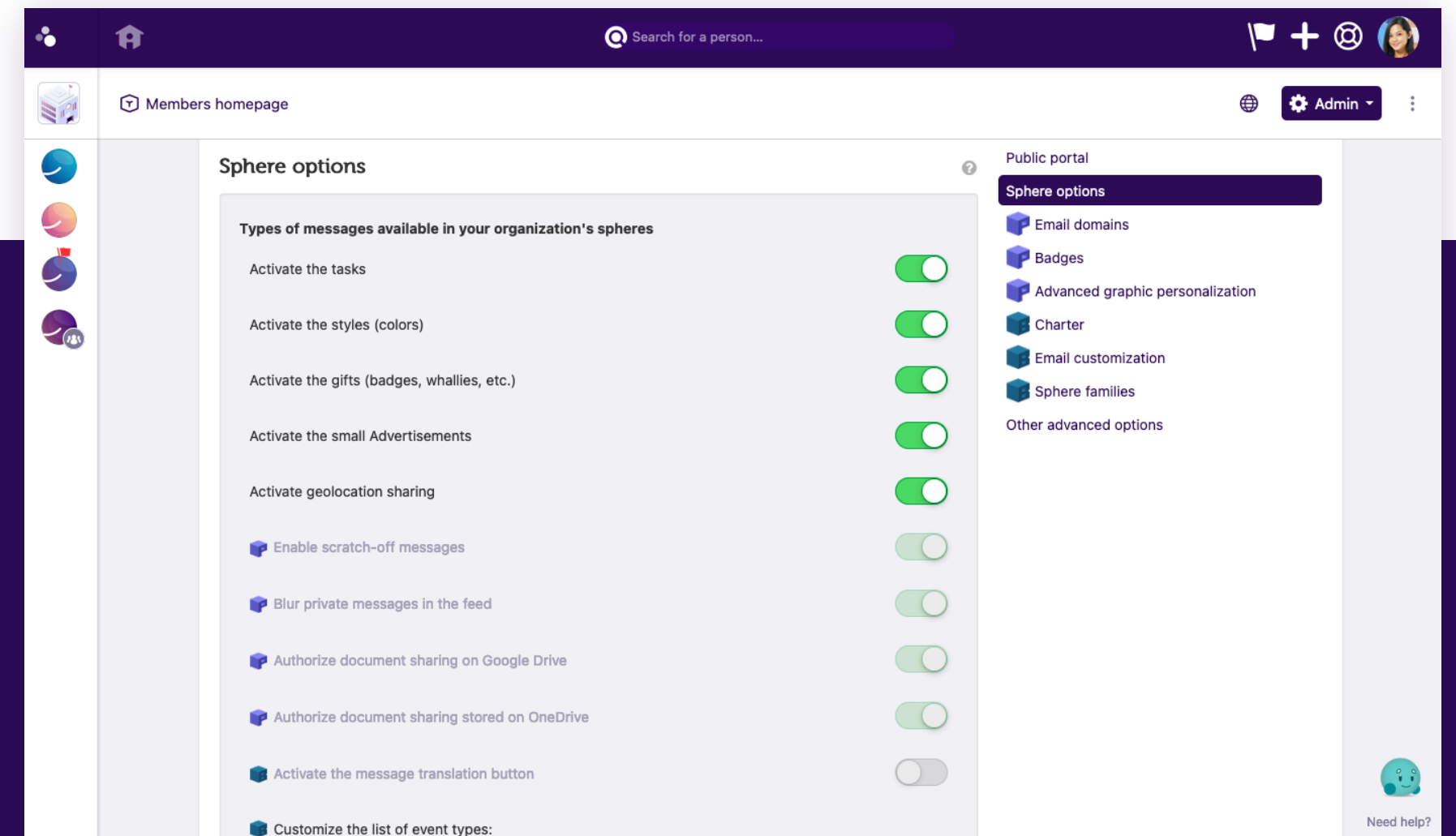
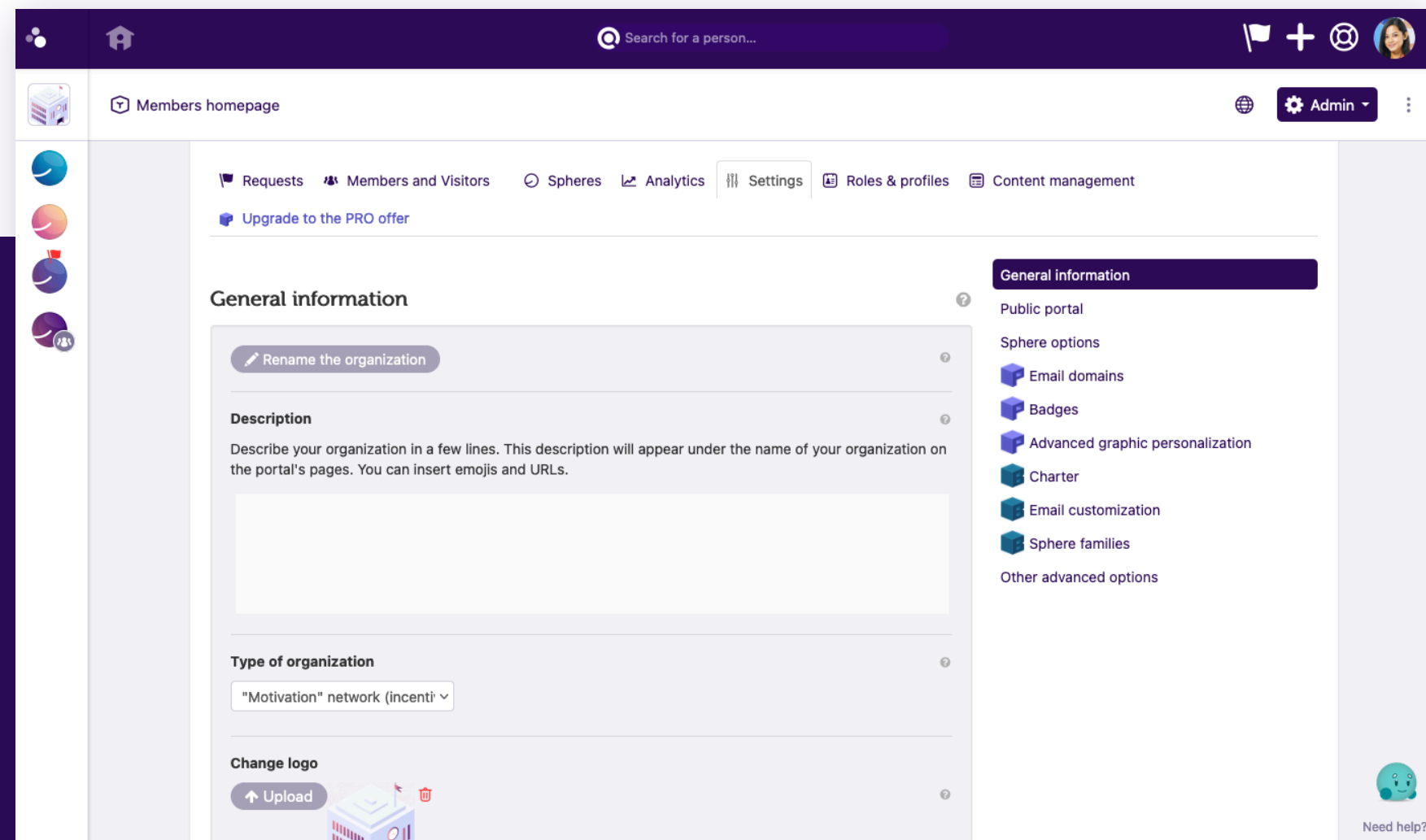
On the “Spheres” page, organization managers can access the settings for all spheres in the organization and administer them individually.

- Name a sphere administrator
- Type and visibility of the sphere
- General sphere settings
- Tools available
- Automatic messages
- Personalization of the sphere

Global settings

In the “**Settings**” section, organization managers have access to general information, the public portal (homepage) and sphere options. They can also choose to activate premium features, such as:

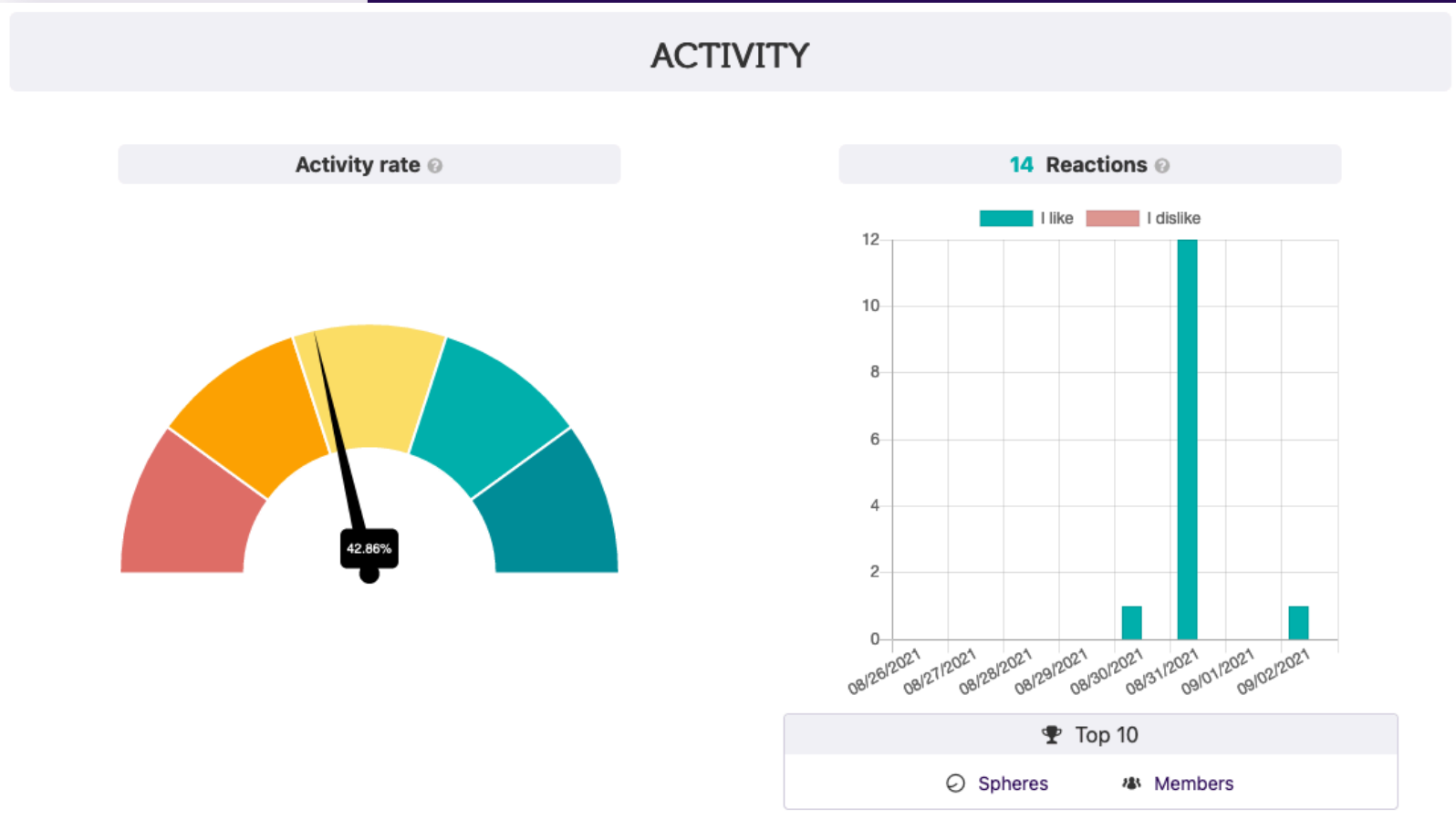
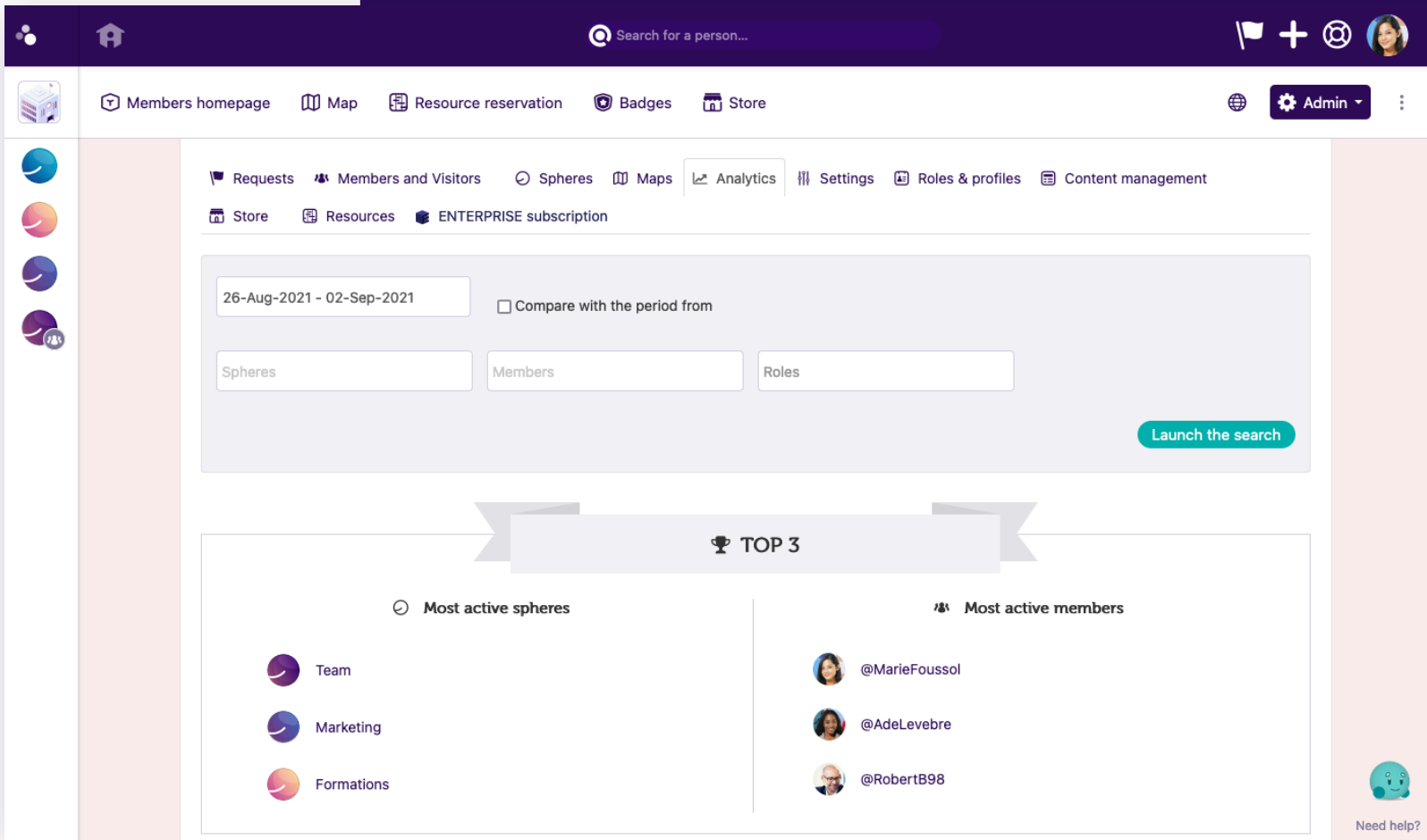
- Charter
- Custom emails
- Sphere families
- Badges
- Advanced graphic customization



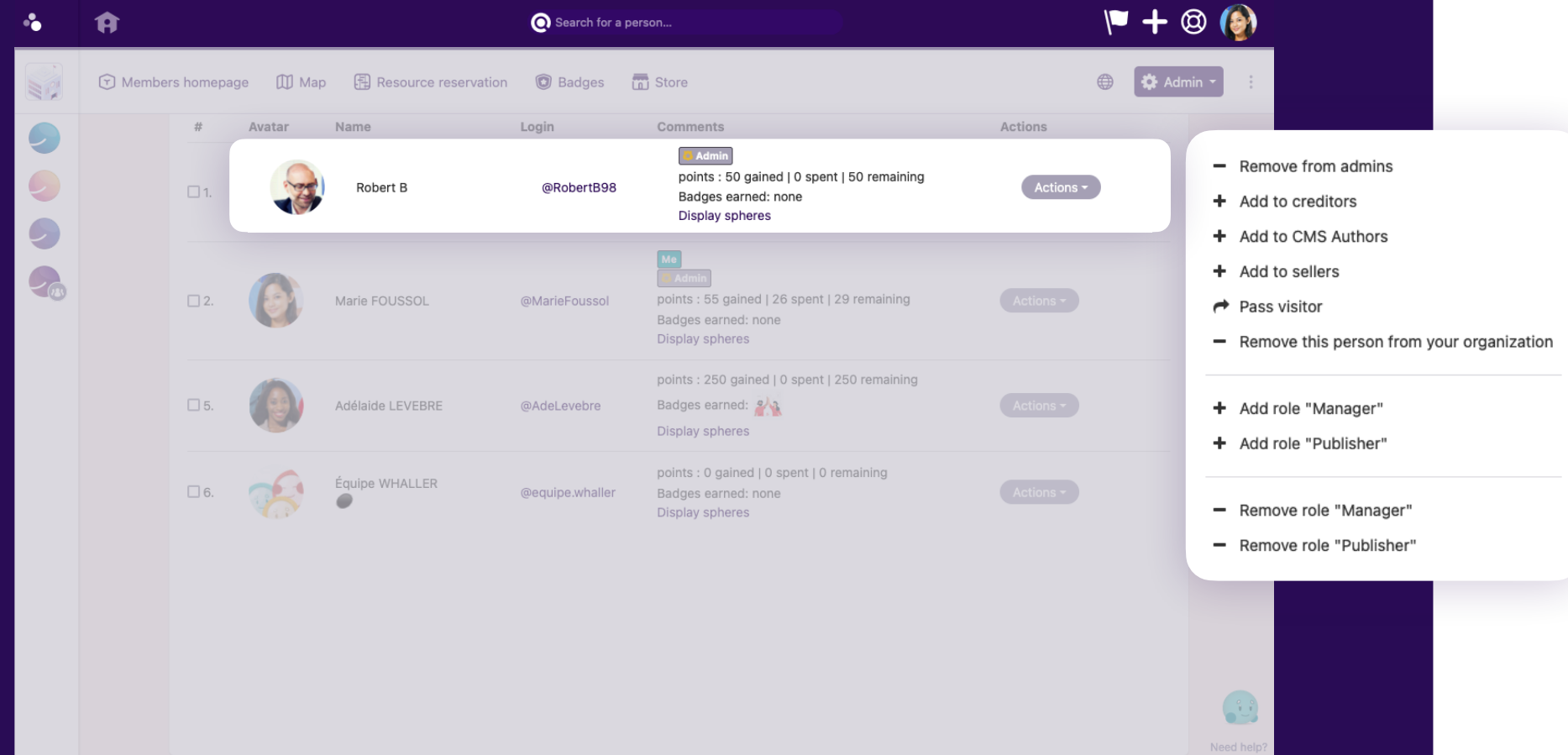
Analytics

The Analytics feature allows organization managers to track:

- The activity rate
- The number of members
- The number of visits
- The ranking of the most active members
- The number of messages, comments and reactions



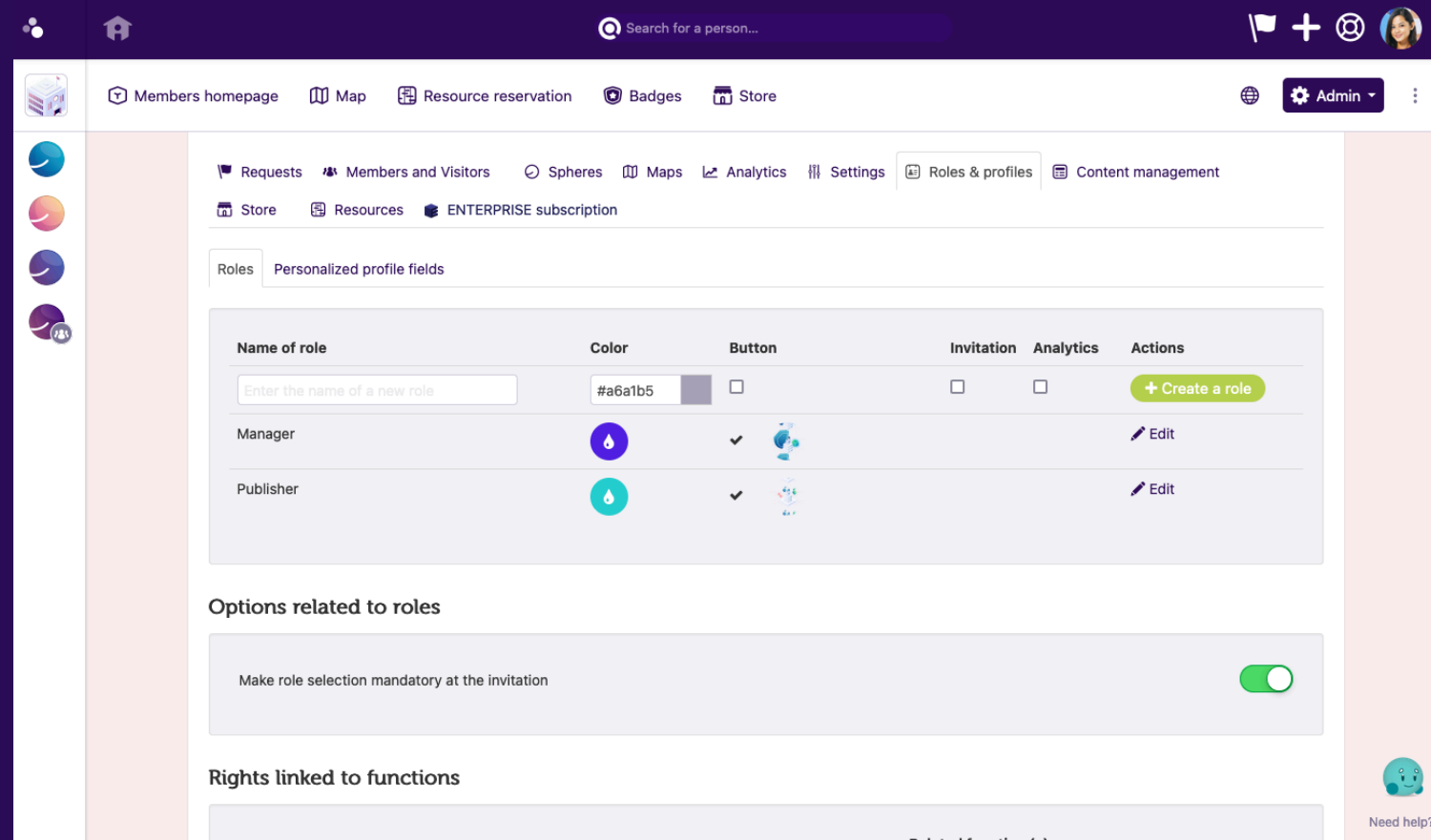
Roles & profiles



On the "Roles & profiles" page, organization managers can create new roles with specific rights for members of their organization.

They can also define **custom profile fields** for members to complete in their profiles.

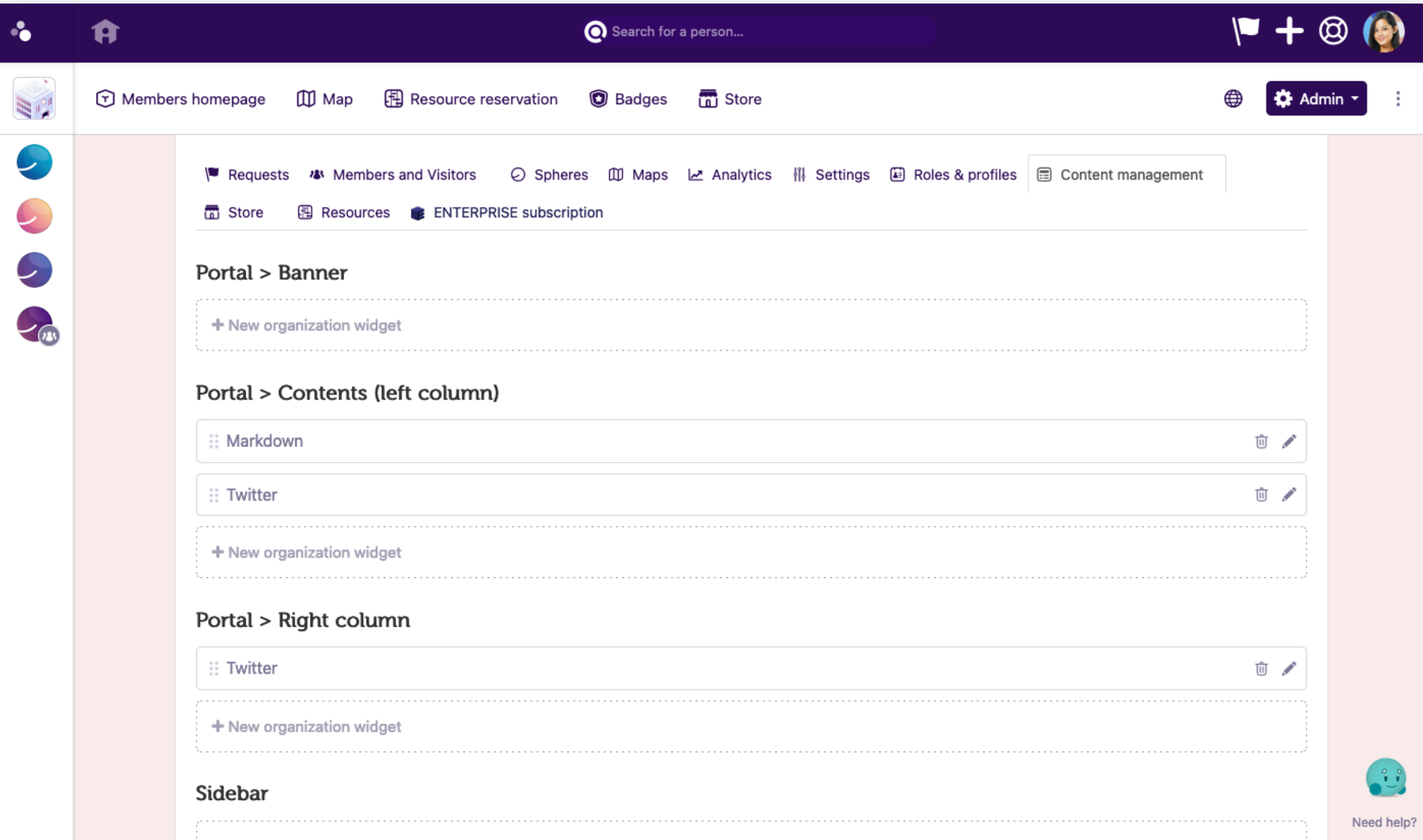
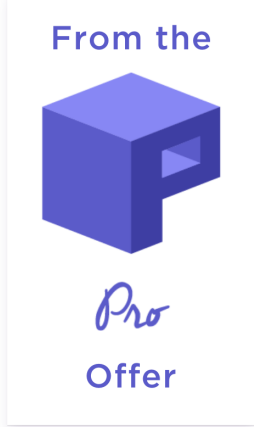
On the “Members” page, organization managers can assign these new roles to select members.



Widgets

In the “Content management” section, organization managers can edit all **widgets** on the organization portal and in each sphere.

Widgets can be located in **several places** on the interface: right or left columns, sidebar, banner.

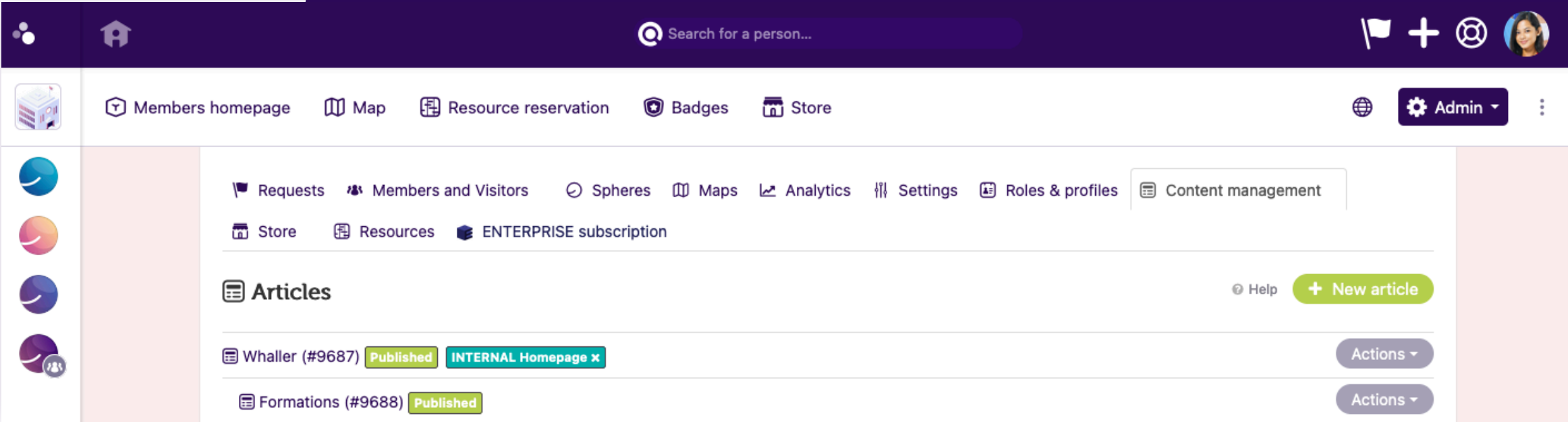


CMS



In the “Content management” section, organization managers can use the CMS to create editorial content for organization members (like an intranet).

It can be defined as the homepage of the organization portal or as the homepage of the public portal.



Useful information

Website

Blog

Twitter

LinkedIn

YouTube

Help Center

Questions? Send a message to



See you soon on Whaller!

