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Using this Guide

This Guide is for users at companies using Global Relay Message, who are responsible for creating and managing channels.

To work with channels, users must be assigned the appropriate access, which is outlined in the following section.

This Guide provides an overview of channels including the required entitlements, workflow, and detailed procedures for creating and managing channels.
Understanding Channels

Channels are specific topics of conversation users can subscribe to that can include an unlimited number of participants. Similar to web channels, Global Relay Channels can be fairly broad and appeal to many users or highly specific and relevant only to a small number of users.

You can create the following types of channels:

- **Company**: These channels are associated with a single company, and only users from the company can join the channel.

  There are two types of company channels you can create:

  - **Open**: These channels can be searched on and joined by anyone in your company. In addition, any member of an open channel can invite anyone from the company.

    You must have the Manage company channels entitlement to be able to create this type of channel.

  - **Restricted**: These channels are by invite only and will not be found by uninvited users when searching available channels. Only people from your company can join this channel.

    You must have the Manage company channels entitlement to create a restricted channel. You can also find restricted channels you are not a participant of, as long as the restricted channel has no owner, allowing you to claim the channel.

- **Community**: These are business-to-business channels that include multiple companies. Each company has an administrator for the channel and is responsible for inviting moderators and participant from their own company.

  You must have the Manage community channels entitlement to create a community channel. You can also find community channels you are not a participant of, as long as your company has no administrator for the community channel, allowing you to claim the channel. Community channels can have only one administrator per company.
Who Can Work with Channels

This section is for administrators at your organization who define access to channels.

To create or manage channels, you must be granted one or both of the following entitlements:

- **Manage company channels**: Users can create, manage, and claim company channels, which can only be joined by users within the same company. Users with this entitlement can also find unowned restricted channels in their channel searches, even if they do not have a role in those channels.

  **NOTE**: Company channels include open and restricted channels.

- **Manage community channels**: Users can create, manage, and claim community channels (i.e. business-to-business channels), which can be joined by users from multiple companies. Users with this entitlement can also find unowned community channels in their channel searches, even if they do not have a role in those channels.
Creating a Company Channel

Create an open or restricted channel for others at your company.

Open channels are ideal for discussing topics relevant to your entire organization such as company-wide notifications. Restricted channels are ideal for topics specific to individual teams such as department projects and activities.

**NOTES:**

- To create a channel, you must be assigned the Manage company channels entitlement.
- Creating a company channel will be available in an upcoming release of Global Relay Message for Android.

**Desktop**

1. In the Message Application, click the Channel icon.
2. Click the Create Channel button.

![Channels](image)
3. From the drop-down menu, select **My Company**.
   The Create Channel window displays.

4. Enter a Name, Subject, and Description for your channel.

5. Select the channel type:

   - **Restricted channel**: These channels are by invitation only and will not be found by uninvited users when they search available channels. Only people from your company can join this channel.

     You must have the Manage company channels entitlement to create a restricted channel. You can also find restricted channels you are not a participant of, as long as the restricted channel has no owner, allowing you to claim the channel.

     All restricted channels display with a lock icon in your list of channels 🦂.

   - **Open channel**: These channels can be searched on and joined by anyone in your company. In addition, any member of an open channel can invite anyone from the company.
You must have the Manage company channels entitlement to be able to create this type of channel.

6. If you selected restricted channel:
   
i. Click Assign Roles.

   ![Assign Roles](image)

   ii. In search field, enter the name of a user you want to add as a member or admin of the channel.

   iii. Select the checkbox of the user you want to add as a member.

   iv. Select one of the following from the drop-down menu:

      o **Participant**: The user will have access to view and participate in the channel; the participant will NOT have access to edit or invite additional participants to the channel.

      o **Moderator**: The user will have access to view, participate, and invite additional users to the channel.

   ![Assign Roles](image)

   v. Click Add.

   vi. Repeat these steps for any additional members you want to add to the restricted channel.

7. If you selected open channel:
i. Click **Invite Participants**.
   You can invite users from your Contacts and/or the Directory (as long as they are from your company).

![Invite Participants](image1)

ii. Search for and select participants you want to invite into your channel discussion.

![Search for and select participants](image2)

iii. Click **Add**.

iv. Repeat these steps for any additional members you want to add to the open channel.
   If you want to add participants after creating the channel, open the channel, click the ellipses,
   select **Show Details** and add more participants.

8. Click **Create**.

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**iOS**

1. In the Message Application, click the Channel icon.

2. Tap the plus button.
3. From the drop-down menu, select *Company*.

The Create Channel window displays.

4. Enter a Name, Subject, and Description for your channel.
5. Select the channel type:

- **Restricted channel**: These channels are by invitation only and will not be found by uninvited users when they search available channels. Only people from your company can join this channel.

  You must have the Manage company channels entitlement to create a restricted channel. You can also find restricted channels you are not a participant of, as long as the restricted channel has no owner, allowing you to **claim the channel**.

  All restricted channels display with a lock icon in your list of channels.

- **Open channel**: These channels can be searched on and joined by anyone in your company. In addition, any member of an open channel can invite anyone from the company.

  You must have the Manage company channels entitlement to be able to create this type of channel.

6. If you selected restricted channel:

   i. Tap **Assign Roles**.
ii. In the search field, enter the name of a user you want to add as a participant or moderator of the channel.

iii. Select the checkbox of the user you want to add as a member.

iv. Select one of the following from the drop-down menu:

- **Participant**: The participant will have access to view and participate in the channel; the participant will NOT have access to edit or invite additional participants to the channel.

- **Moderator**: The user will have access to view, participate, and invite additional users to the channel.
v. Tap **Add**.

vi. Repeat these steps for any additional members you want to add to the restricted channel.

7. If you selected open channel:

i. Tap **Invite Participants**.

You can invite users from your Contacts and/or the Directory (as long as they are from your company).

ii. Search for and select participants you want to invite into your channel discussion.

iii. Tap **Add**.

iv. Repeat these steps for any additional members you want to add to the open channel.

If you want to add participants after creating the channel, open the channel, tap the ellipses, select **Show Details** and add more participants.

8. Click **Create**.
Creating a Community Channel

Community channels are multi-company restricted channels that include multiple (2-100) companies. Each company has an owner for the channel and is responsible for inviting moderators and participants from their own company. Once a community channel is created, you can no longer add or remove companies.

As a community channel creator, you can:

- Add companies to the channel.
- Assign channel roles to users in your company.

Once you create a community channel, contact and notify individuals from the companies you added to the channel via Global Relay Message. A participant from each company with the Manage community channels entitlement must search for and claim the channel to become a co-administrator. Each administrator can then start assigning roles to participants from their company.

⚠️ NOTE: Creating a community channel will be available in an upcoming release of Global Relay Message for Android.

To create a community channel:

**Desktop**

1. In the Message Application, click the Channel icon.
2. Click the Create Channel button and select Community.
3. In the Add Companies field, enter the name of a company you want to add to the community channel and press Enter.

4. From the results, select the company you want to add and click Add.

5. Enter a name, subject, and description of the community channel.

6. To add more companies to the community channel, click Add Companies and repeat steps 3 and 4.
7. To add moderators and/or participants from your own company:

   v. Click your company’s name.
   vi. Click **Assign Roles**.
   vii. Search for a user you want to add to the channel.
   viii. Select **Participant** or **Moderator**
   ix. Click **Add**.

8. Click **Create** and in the Create Community Channel dialog.

   ☢️ **NOTE:** Once you create a community channel, you cannot add or remove companies from the community channel.

9. Click **Proceed**.

10. Notify your contact(s) at other companies that the community channel has been created.

11. Your contact at the other company must claim the channel.
    For more information, see the [Claiming a Channel section](#).

**iOS**

1. In the Message Application, tap the Channel icon.
2. Tap the plus button and select **Community**.

3. In the Add Companies field, enter the name of a company you want to add to the community channel and tap **Enter**.

4. From the results, select the company you want to add and tap **Add**.
5. Enter a name, subject, and description of the community channel.

6. To add more companies to the community channel, tap **Add Companies** and repeat steps 3 and 4.

7. To add moderators and/or participants from your own company:

   i. Tap your company’s name.
ii. Tap **Assign Roles**.

iii. Search for a user you want to add to the channel.

iv. Select **Participant** or **Moderator**.

v. Tap **Add**.

8. Tap **Create** and in the Create Community Channel dialog.
   
   **NOTE**: Once you create a community channel, you cannot add or remove companies from the community channel.

9. Tap **Proceed**.

10. Notify your contact(s) at other companies that the business channel has been created.

11. Your contact at the other company must claim the channel.

   For more information, see the [Claiming a Channel](#) section.
Understanding Channel Roles

Each participant of a channel must have one of the following channel roles:

- **Administrator**: By default, the creator of the channel, who has the ability to:
  - Change the subject and description.
  - Assign or revoke the moderator and participant roles.
  - Assign a participant the moderator role and vice versa.

- **Moderator**: Assigned by the administrator, the moderator has the ability to:
  - Assign or revoke the participant role.

- **Participant**: Assigned by the administrator or moderator, a participant has the ability to:
  - Invite anyone in their company to an open channel for which they are a member.
  - The participant role has no administrative privileges.

**NOTES**:

- You can only grant a role to a user in your company.
- To add roles to an existing channel, click or tap the ellipses, select *Show Details*, and select *Members and Roles*. 
Managing Channels

The following sections outline how to manage the channels you have been invited and subscribed to, including:

- Accepting a channel invitation
- Searching for and joining a channel
- Unsubscribing or leaving a channel
- Filtering your channel view
- Printing channel messages

**NOTE:** Managing channels functionality will be available in an upcoming release of Global Relay Message for Android.

Accepting a Channel Invitation

Invitations to join new channels are marked with **Invite**.

- To accept and subscribe to the channel, click **Invite**, click **Accept** and then click **Subscribe**.

**NOTE:** If you decline an invitation to an open channel, you can still search for and join the channel at a later time. However for restricted and business channels, you will not be to search for and join the channel if your channel role has been removed.

Searching for and Joining a Channel

1. From the Message Application, click the Search icon.
2. Enter search keywords and click the search button.
3. Click **Join**.

   **NOTE**: Once you have joined the channel, you can subscribe to it.

### Unsubscribing from a Channel

1. In the Message Application, click the Channel icon.

2. Click a channel to which you are subscribed.
3. In the top-right corner, click the menu button and select **Unsubscribe**.

![Unsubscribe screen](image)

**NOTE:** To leave a channel, open a channel for which you a member, click the ellipsis and select **Leave**. After leaving a channel, you can search for and rejoin that channel, assuming your role has not been removed.

### Filtering Your Channels

- To filter your Channels, click the filter icon and select one of the following:
  - **All**: This filter includes both subscribed and unsubscribed channels.
  - **New**: This filters channels that have new content or a new invitation.
  - **Subscribed**: This filter includes only subscribed channels.
Printing Channel Messages

**NOTE:** Printing messages is currently only available for Global Relay Message for Desktop.

- To print messages within a channel conversation, click the eclipses in the channel window and select the following:
  - **Print Conversation:** Print all channel data, including channel type (i.e. company restricted channel, company open channel, or community channel), time zone, number of participants, name of participants, the companies of each participant, and all messages currently loaded in that channel.
  - **Select Messages:** Select specific messages, including subject changes and users who have accepted or declined channel invitations, to be printed. Once you have selected the appropriate messages, click the print button and follow the onscreen prompts.

**Tip:** To print all messages in a channel: Scroll to the beginning of the channel, select the first message, scroll to the bottom of the channel, hold Shift and select the last message in the channel, and click the Print button.
Claiming a Channel

By default, the user who creates a channel is the channel administrator. For community channels, each company with members in a channel must have an administrator.

A channel can lose its administrator in the following situations:

- The channel administrator loses their Manage company channels or Manage community channels entitlement.
- The channel administrator has their access from Global Relay Message removed.

In these cases, the following events occur:

- The owner loses their channel management entitlements.
- The owner automatically leaves all of their channels.
- The owner is logged out.

A user with the proper channel management entitlements can claim a channel and become its administrator, including granting roles to the channel.

**NOTE**: Claiming a channel functionality will be available in an upcoming release of Global Relay Message for Android.

To claim a channel:

**Desktop**

1. In the Message application, click the Search icon.
2. Enter the name of the channel and click the **Channels** tab.
3. Select the channel to claim.
4. Click **Claim**.

iOS

1. In the Message application, tap the Search icon.
2. Enter the name of the channel and tap the **Channels** tab.
3. Select the community channel to claim.
4. Tap **Claim Ownership**.