

First Steps for Administrators



Table of Contents

1. User Management	p. 3
2. App Configuration	p. 5
3. Contact List	p. 7
4. Customization	p. 9
5. Rollout	p. 10
6. Documents and Guides	p. 11

1. User Management

The first step in setting up your Threema Work environment is to add your users.

Users

If unmanaged devices are used in your company, you can add users individually. You also have the option to use the **“Batch input”** ¹ feature or import a **CSV file** if you want to add multiple users simultaneously.

When adding a user, it’s recommended to enter their full name. This ensures that the user is correctly displayed in the contact list of all other users from the outset.

Username and password are required to activate the app for the first time. You can choose any username you want, for example, the user’s email address. The username is not visible for other users.

essional (Planet Express)

Add

User License for MDM system Contact

Batch input Import CSV file 1

You can add up to 333 users

First name Last name

Username Employee number

Tags

Password

+ Add another user

Save password as Prevent ID changes

Plain text Hash No Yes

Cancel Save

The employee number is used for user identification and for integration into a user directory (e.g., Active Directory).

Tags (previously “Category”) are used to further identify the users and can be looked up in the company directory. Here, you can add the position, department, and/or location of an employee, for example.

License for MDM System

If managed devices are used in your company, you need to add a license for an MDM system. Specify the number of licenses for the managed devices on which Threema Work will be used in the future.

These licenses require the app to be configured via your external MDM system.

Contact

Use this button to manually add external contacts. These contacts will then appear in the contact lists of your users but won't have access to the contact list of the subscription.

When adding your users, you have the option to choose whether the respective passwords are stored in

plain text or as a hash ².

If you enable the **"Prevent ID changes,"** ³ the credentials cannot be used with any other Threema ID than the one they are already in use with (unless the original ID is revoked or detached from the subscription).

Once you have added all users, you are ready for the app configuration.

essional (Planet Express)

Add

User

License for MDM system

Contact

Batch input Import CSV file

You can add up to 333 users

First name

Last name

Username

Employee number

Tags

Password

🔄 👁

+ Add another user

Save password as

☒ Plain text ☐ Hash ²

Prevent ID changes

☒ No ☐ Yes ³

Cancel

Save

2. App Configuration

With many different configuration settings available in the management cockpit, you can tailor the app to your specific use case. For example, you can enforce or prevent backups.

Please Note

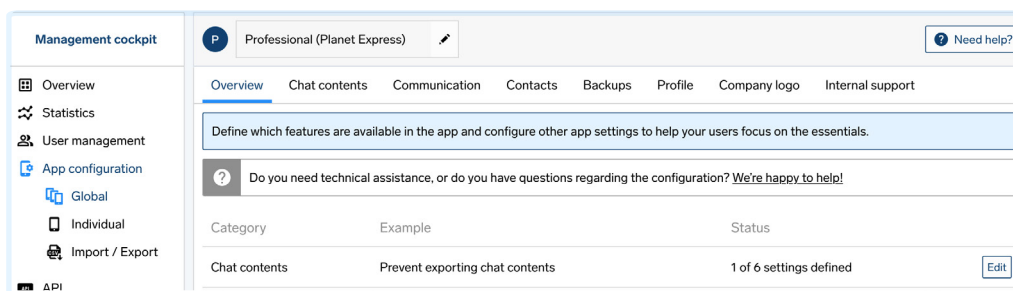
If you are using a “License for MDM system,” the configuration for these users has to be done in the MDM system, not in the management cockpit.

[This document](#) gives you an overview of the available configuration settings.

Take your time and carefully review the various configuration settings. It’s recommended to decide before the rollout how the app should be configured and to adjust the corresponding settings.

A properly configured app will help you save a lot of time in the future. In addition, this allows users to use the app straight away.

The menu item “App configuration” distinguishes between **global values** and **individual values**. Global values apply to all users of a subscription, whereas individual values only apply to individual users. Individual values override the global values. This allows you to configure the app more restrictively for certain users, for example.



Best Practice

Configure the following settings for each user in the “Individual” menu item:

- **th_csi***
Here, you can insert an employee number, for example. This value is used to uniquely identify the user and may be necessary for integration into an Active Directory.
- **th_category***
The categories/tags you insert here can be looked up in the company directory (see [p. 5](#)). Examples would be the department or location of an employee. You can insert several tags and separate them with a delimiter.
- **th_nickname**
The nickname is displayed in push notifications. If you set a nickname, it overrides any nickname set by the user.
- **th_firstname***
Enter the user’s first name here. Together with the last name (see th_lastname), this ensures a clean contact list.
- **th_lastname***
Enter the user’s last name here.

* These details may have been provided when adding the user, which is why they may already be filled in.

If you want to edit multiple users at the same time, you can use the “Import/Export” function in the app configuration. Simply export and edit a CSV file, and when you import it again, all configuration settings will be adjusted accordingly.

3. Contact List

In the user management, you can specify which users are visible in the contact list.

If **“In contact list”** ⁴ is ticked, this user’s Threema ID is automatically added to the contact list of all users of this subscription. You can adjust this setting by clicking on the three dots on the right side and then selecting **“Edit.”**

Subscriptions

Quotations/invoices 2

Apps

Settings

Management cockpit

Overview

Statistics

User management

App configuration

API

Broadcast

Gateway

Services

Orders & invoices

Access privileges

Help / Support

P

Professional (Planet Express)

1 Notification

Need help?

9 of 350 users active

Add

Export

Settings

Refresh

Last refresh: 02:05:08 PM, 04/08/2024

Sort by

Name

Filter by

Show all

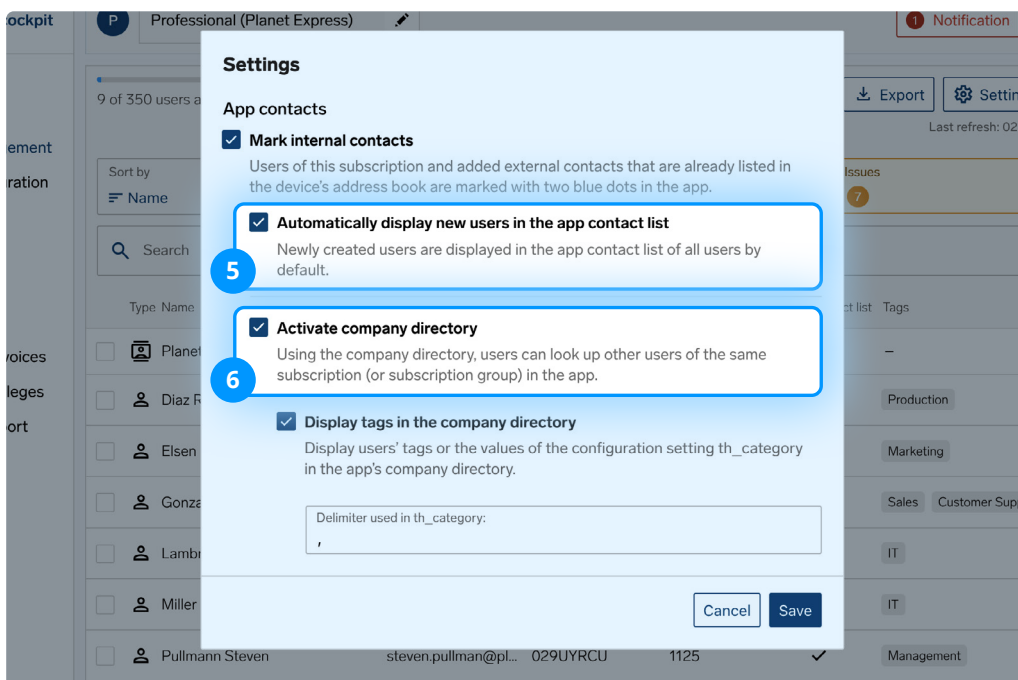
Search

Type	Name	Username	Threema ID	Employee no.	In contact list	Tags	Status
☐	Planet Express		*TBCDWFK		☒		
☐	Diaz Roberto	roberto.diaz@plan...	0TJ46RTD	8877	☒	Production	
☐	Elsen Chase	chase.elsen@plane...	0BMCV62K	5842	☐	Marketing	
☐	Gonzales Corena	corena.gonzales@...	OPRYABTH	1236	☒	Sales Customer Support	
☐	Lambros Ronni	ronni.lambros@pla...	0BM4K389	3354	☒	IT	
☐	Miller Luka	luka.miller@planet...	0N45ADPK	2863	☒	IT	
☐	Pullmann Steven	steven.pullman@pl...	029UYRCU	1125	☒	Management	

If you want this setting to be the same for all users, open the user management settings and activate the option **“Automatically display new users in the app contact list.”** ⁵ This setting is useful in many cases, but can lead to a long contact list if you have a large number of users. In this case, it’s advisable to deactivate this setting and activate the **company directory** ⁶ instead. This allows users to search for important contacts by name or category/tag and add them manually to their contact list.

Please Note

Once a contact is visible in the contact list, it will not be removed from the contact list when deactivated. If the option “Automatically display new users in the app contact list” is deactivated at a later point, existing contacts will remain visible in the contact list. The adjustment will only be applied to devices that are added later.

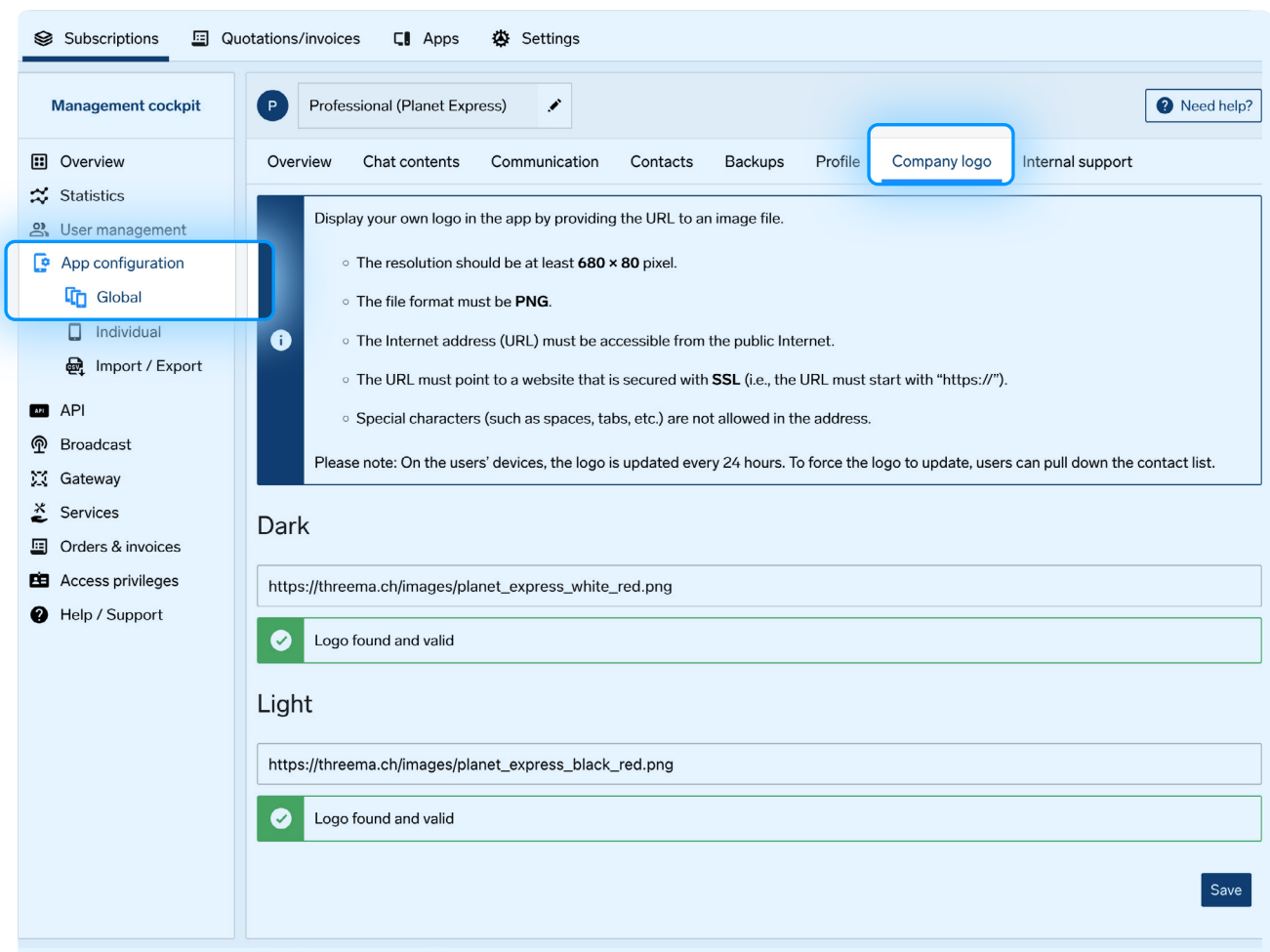


Company Directory

If “Activate company directory” is checked, contacts that are not visible in the contact list can still be found in the company directory. It is also possible to search for tags/categories, which can be added in the app configuration (th_category) or in the contact details in the user management.

4. Customization

In “App configuration > Global > Company logo,” you can add your own logo. This logo will be displayed in the Threema Work app, personalizing the app for your users.



5. Rollout

Once you have completed the previous steps, you are ready for the rollout.

If you're using an external MDM system, this system will be used for the rollout.

Otherwise, you can use the activation link, which you can find in the user management. Instruct your employees to download the Threema Work app, and then send each user their personal **activation link**. As soon a user clicks on their activation link, they will automatically be logged in.

Best Practice

- Check which users have not yet activated the app. In the user management, these users will be marked **orange**. You can filter them by opening "Issues." Send them a reminder with the activation link if they haven't activated the app after a week, for example.
- Regularly check whether enough licenses are available to avoid under-licensing. If too many licenses are in use, the corresponding users will be marked in **red** and shown in the "Issues."

The screenshot shows the Threema Work user management interface. On the left is a sidebar with navigation links: API, Broadcast, Gateway, Services, Orders & invoices, Access privileges, and Help / Support. The main area displays a table of users under the heading 'planet_express_mdm_license_1' with a sub-header '0 of 100 users active'. The table has columns for Type, Name, Username, Threema ID, Employee no., In contact list, Tags, and Status. A search bar and filter options are at the top. A red 'Issues' button with a question mark icon is visible. A context menu is open over the user 'Kramer Kim', showing options: Detail, Copy activation link (highlighted with a blue circle), Configure app, Edit, and Delete. The user 'Diaz Roberto' is marked with a red status icon, and 'Elsen Chase' is marked with an orange status icon.

Type	Name	Username	Threema ID	Employee no.	In contact list	Tags	Status
☐	Planet Express		*TBCDWFK		✓	-	
☐	Diaz Roberto	roberto.diaz@plan...	0TJ46RTD	8877	-	Production	!
☐	Elsen Chase	chase.elsen@plane...	0BMCV62K	5842	-	Marketing	o
☐	Gonzales Corena	corena.gonzales@...	0PRYABTH	1236	✓	Sales, Cust...	
☐	Kramer Kim	kim.kramer@plane...			-		
☐	Lambros Ronni	ronni.lambros@pla...	0BM4K389	3354	✓	IT	
☐	Miller Luka	luka.miller@planet...	0N45ADPK	2863	✓	IT	

6. Documents and Guides

Share the following documents with your users to help them get started with Threema Work.

[First Steps for End Users iOS](#)

[First Steps for End Users Android](#)

[Backups on iOS](#)

[Backups on Android](#)

[Flyer About Group Calls](#)