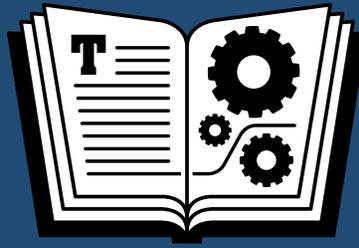


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TAKE CONTROL OF

# SLACK ADMIN

*by* **GLENN FLEISHMAN**  
**\$15**

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# Read Me First

Welcome to *Take Control of Slack Admin*, version 1.0, published in May 2016 by TidBITS Publishing Inc. This book was written by Glenn Fleishman and edited by Tonya Engst and Adam Engst.

This book takes you through planning and creating a new Slack team, setting it up and managing its channels and users. You'll learn the difference between free and paid teams, how to build a team's culture, and how different administrative settings can shape how a team works. You'll also learn how integrations can bring all manner of capabilities to your team.

**Note:** This book focuses on the needs of smaller and mid-sized groups, so some enterprise-related topics are mentioned only briefly or not covered at all.

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## Updates and More

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You can access extras related to this ebook on the Web (use the link in [Ebook Extras](#), near the end; it's available only to purchasers). On the ebook's Take Control Extras page, you can:

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# Slack Basics

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This book assumes that you are already aware of Slack’s basic features, and know your way around in Slack. If that’s not the case, check out the companion book [Take Control of Slack Basics](#), which explains how to accomplish loads of tasks, including:

- Downloading and signing in to the various Slack apps for OS X, Windows, iOS, Android, and the Web
- Understanding the differences between the mobile, desktop, and Web versions of the Slack apps
- Composing and sharing messages, text snippets, and posts
- The differences between public and private channels, and when to use private channels or direct-message conversations
- Uploading and managing files
- Making one-to-one and multi-party audio chats
- Interacting and reacting in channels—and muting high-traffic discussions
- Making yourself more productive in Slack through careful adjustment of its notification features
- Using slash commands, handling emoji, and @mentioning users
- Understanding how the Search feature functions

Visit the catalog page for [Take Control of Slack Basics](#) and look on the Bulk Discounts tab to find out about discount pricing so that you can give the book to all the users in your team. It can dramatically reduce requests for help (which will make you more productive too!).

# Introduction

Slack is a wonderful group messaging tool that lets people collaborate whether they're working cheek-to-jowl in crowded cubicles or spread out to the four corners of the globe. It combines aspects of email, instant messaging, and texting with cloud file storage, searchable archives, and access control.

In a companion book, [\*Take Control of Slack Basics\*](#), I explain the ins and outs of using Slack effectively, efficiently, and with joy. In this volume, I teach you how to set up a free or paid Slack team and how to administer it.

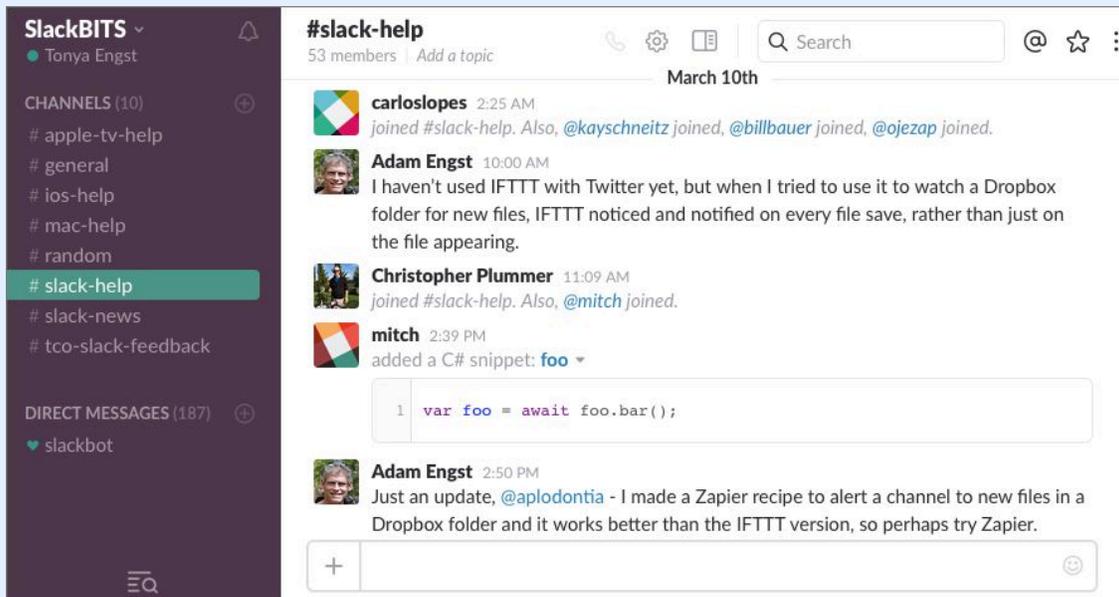
By default, Slack gives regular users a lot of control for configuring their team, allowing them to set up channels for discussion and add integrations that provide connections with third-party services. As a tool designed for informal adoption by many types of groups, this makes sense. But administrators can also tighten controls to make Slack more appropriate for an organization, such as a large corporation or government department, that has rigid rules or must comply with specific legal regulations.

Many larger organizations have full-time information technology (IT) staff, for whom Slack is yet another communications tool to set up, configure, and manage, and if you're working in such a group, you'll find a lot of useful tips and advice in this book.

But if you're not an IT professional, never fear! With this book's help, you won't need that background in order to register a new Slack team, customize Slack's behavior to your team's needs, and manage your team's configuration over time.

## Join Us in SlackBITS!

You don't have to just read about Slack in this book; you can explore Slack itself in the free SlackBITS team that TidBITS Publishing has set up for readers and Slack enthusiasts (**Figure 1**).



**Figure 1:** Slackbits has quite a few channels for different discussions, including *#slack-help*, where people can ask for and share Slack tips.

I'll be using SlackBITS as an example throughout the book and will be hanging out there afterward, as will my publishers, Adam and Tonya Engst. We can't guarantee to answer every question about Slack, but we're happy to take feedback about the book, and I anticipate that as more Slack users and admins join the group, it will become a useful resource.

To join the team, go to [slackbits.herokuapp.com](https://slackbits.herokuapp.com), enter your email address, and agree to the [code of conduct](#). You'll receive a Slack invitation in email right away.

# Slack Admin Quick Start

This book takes you through all the major tasks you need to get started in Slack and then manage a team over time. You can follow the instructions in the book from start to finish, but you may want to jump around in order to find answers to your most pressing questions first. If that's the case, you can start at any point below.

## ***Create your team:***

- Is Slack the right tool for your group? Consider the details in [Can Slack Work for Your Group?](#)
- Should you pay for more features? See [Pick Free or Paid](#).
- Decide what special attributes you want to assign to your team—including its name and domain—in [Register Your Team](#).
- Starting a team isn't all about clicking buttons. Consider the touchy-feely aspects of how to [Create Culture](#). Pay special attention to the sidebar [Creating a Code of Conduct](#).

## ***Populate your team:***

- Sort out whether you need both full members and guests in [Understand User Types](#).
- Invite users—and make sure each user is of the right type. See [Invite Users](#).

## ***Enhance your team:***

- [Build Channels](#) with a plan in mind so that their names work together sensibly, and [Adjust Channel Permissions](#) as needed to enhance productivity and harmony.
- Determine which integrations your team needs in [Integrations to Help Your Team](#).
- If someone is behaving poorly, leaves a project, or exits your organization, find help in [Kick a User Out of a Channel](#) and [Disable a User](#).

### ***Train users:***

- Download the slide deck from [Train Users](#) so you can use it as the basis for a presentation to your users.
- Also in [Train Users](#) is a link to a cheat sheet of Slack tips that you can download and print as a handout for your presentation. You can distribute it to your entire team—consider creating a [#help-slack](#) channel in your team where you upload that file and centralize questions your users have about Slack.
- Consider a few clever tricks that will help you [Use Slack to Promote Good Behavior](#).

### ***Handle special management tasks:***

- When a channel isn't useful any more, find out how to [Archive a Channel](#).
- Implement legally required retention policies. See [Configure a Retention Policy](#).
- Set up integrations that help you administer more systems more easily with the tips in [Integrations to Help Admins](#).

# Start a Slack Team

This chapter dives into the details you need to start a Slack team and walks you through the initial registration process. It also looks carefully at the differences between free and paid teams.

Let's start with checking off boxes to make sure you should start a Slack team for your group.

---

## Can Slack Work for Your Group?

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Before we get started, I need to note a few critical provisos related to running a Slack team. You might need to check in with others in your organization, including IT, management, legal, and HR, because of some of the specific issues discussed below.

### Skunkworks...or Not

If you want to set up Slack in an organization where you haven't been given permission to make tech decisions on your own, I recommend checking that it's okay with the powers that be first.

If your organization has an IT department, that department almost certainly has to be involved with your use of Slack and may even need to "own" the Slack team to make sure it complies with security and monitoring policies. If your group is consensus-driven or has a flat hierarchy you may need to have a discussion about how Slack fits into what you do.

Of course, Slack has slid into many companies, even large ones, by people setting it up and getting permission later. You know best how your organization responds to that sort of initiative.

## Slack's Central Servers May Be a Problem

Slack retains every team's messages and files on its own servers. For some organizations, the mere fact that Slack can't be hosted internally or in a secured facility may prevent Slack adoption.

For instance, Slack [isn't HIPAA-compliant](#), which may prevent health-care-related groups from using it; Slack might one day achieve that compliance. And Slack [has a terms of service addendum](#) for U.S. government teams that any such group is subject to.

Determine your organization's requirements in this regard before you launch a Slack team.

## Data Privacy

With any service you administer, including Slack, it's essential that you think about the privacy implications. You should consider how well a service keeps information secure against:

- Malicious parties and criminals
- Government agencies who don't have a warrant or court order that gives them legal access to the data
- Companies that want to use data for targeted marketing
- Other users of the same service, such as other Slack customers
- Other users within the same group, such as a Slack team
- Those in your organization who are charge of deploying a tool, such as your IT department
- You
- The primary owner of a team if it's not you

## Hidden Messages

After an opinion Web site ran an article during the election cycle attacking the veracity of one of its own reporters, an internal battle broke out in the group's Slack team. Staffers who opposed the editors' actions sent screen captures from Slack to news outlets.

At the time, I joked on Twitter to Slack's CEO, Stewart Butterfield, that Slack could use steganography to allow team admins to track down the source of such leaks. *Steganography* is a general term for hiding information inside of something that doesn't appear to contain a secret. In the olden days, that could be a telegram in which the first letter of every word spelled out a message. In modern times, a pattern of what seems like noise can be introduced to a digital image and then recovered by software that knows how to analyze it.

With Slack, the company could conceivably put a background pattern in each client that would uniquely identify a user and a team when a screen capture was taken.

While it was a joke, Butterfield said publicly that Slack doesn't do that and has no plans to do anything similar.

In its [privacy policy](#), Slack states explicitly: "Slack is the custodian of data on behalf of the teams that use Slack. We don't own team communication data. Teams own their data." That's a great place to start.

A team's primary owner does, in some real sense, *own* the messages in the team. That person has signed a contract with Slack, even if it's for a free team, and thus has ownership and legal responsibility.

But Slack errs on the side of user privacy. No one, not even the primary owner, can use Slack to read direct message conversations or the contents of private channels unless they're part of those interactions. (There's an exception that I'll discuss next). If you're the primary owner, know that other team members could be having discussions to which you are in no way privy. (There are exceptions if you believe someone is violating the law and bring in law enforcement, however.)

A notable exception to Slack's policy of keeping private channels and conversations private to the participants is [compliance exports](#). Paid teams at the Plus level, currently the most expensive tier, can enable

compliance exports. These exports may be required in some industries or for legal reasons. Compliance exports let team owners export everything in a Slack team, including messages in private channels and conversations, although they can't use a Slack app: they have to export the data and view it in third-party text or log-analysis software.

If you enable compliance exports, every user is notified at that moment, and only messages posted to the team after that point are included in the compliance export. Users who join after that point are notified when they join the team. Slack doesn't take this override of privacy, even for a business, lightly. It notes, "We've included protections to ensure that Compliance Exports are used appropriately."

## How Slack Manages Security

The security story for Slack, the way in which they keep your private data private, is simpler. Everything passing from Slack clients to servers runs over encrypted transport. Slack also undergoes audits from independent third parties. You can read more about Slack's [security practices](#) on the company's Web site.

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## Register Your Team

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Slack needs to know a few basic things about your team, which you enter as part of registering it. Although all these items and choices can be changed later, you may want to consider them before you dive into the registration form:

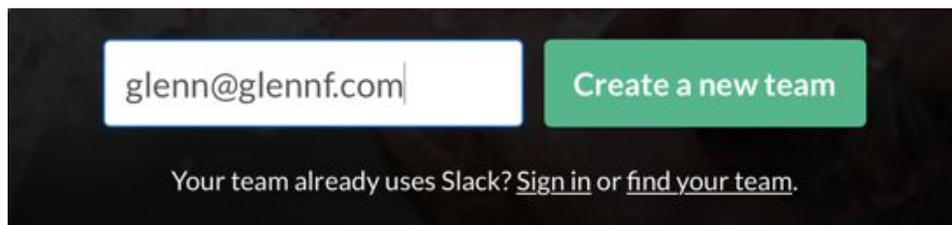
- **Owner:** Usually, this is you. Because you are registering the team, you will become the primary owner. Only the primary owner has permission to delete a team. (Teams can have additional owners who have nearly as much power as the primary, and I'll explain how the primary owner can add other owners or designate someone else as primary owner later, in [Change a User's User Type](#).)
- **Owner email address:** You can use your normal email address, but consider whether you should instead use a specific address that can stay with the Slack team even if you leave the group.

- **Team name:** The team name appears in various places, including in a user’s list of teams that they belong to and at the top of the main sidebar in the Slack app, when a user has that team active. As you can imagine, it’s hard to find something short and sweet for a team name if your company or group name doesn’t suffice—or is already taken.
- **Team subdomain name:** This name, which I recommend you keep short, appears prefixed to [.slack.com](#) to form the URL that team members visit in order to interact with the team in the Web app. Also, each message in Slack has a unique URL and users will at times see those URLs. Something short and recognizable is good. The team name and team subdomain name do not have to match.
- **Your Slack username in the team:** Because you’ll be setting an example for team members as they join, you may want to set up username guidelines—and follow them with your own username. To find out what limits Slack puts on usernames and see my suggestions, refer to [Username Guidelines](#).
- **Free or paid?** All teams start as free. You can convert a team to paid right away or at any time later. For details on the differences, skip ahead to [Pick Free or Paid](#).
- **Code of conduct:** Although Slack won’t ask for it, for any sort of large or formal team, I strongly recommend that you create a code of conduct and post it where your team can see it (see [Creating a Code of Conduct](#)). For public teams, like [SlackBITS](#), also post a link on the signup page. As you create your team, you can mention it in the purpose of the [#general](#) channel, for instance, or parts of it in your team’s loading messages. You could even have Slackbot remind the [#general](#) channel of it once every month or so.
- **Team icon:** Slack will supply a default icon with a large letter on it, the letter being the first letter in your team name. This icon appears in a few places in Slack, including the left-hand Teams sidebar in the desktop and Web apps. You can (and probably should) upload your own icon.

Also, before you begin, you may wish to review Slack's [Terms of Service](#) and [Privacy Policy](#).

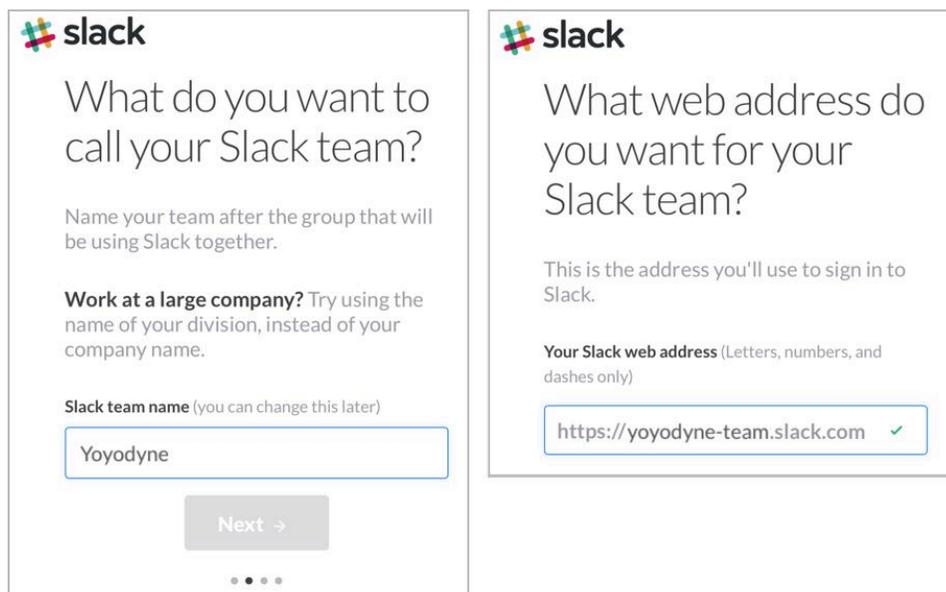
Now that you've assembled the information that you'll be giving Slack as you set up your team, here's how to create a team:

1. Go to [slack.com](https://slack.com).
2. In the field at the bottom of the page, enter the email address you want to use to log in as the team's owner and click Create a New Team (**Figure 2**).



**Figure 2:** Start by providing your email address.

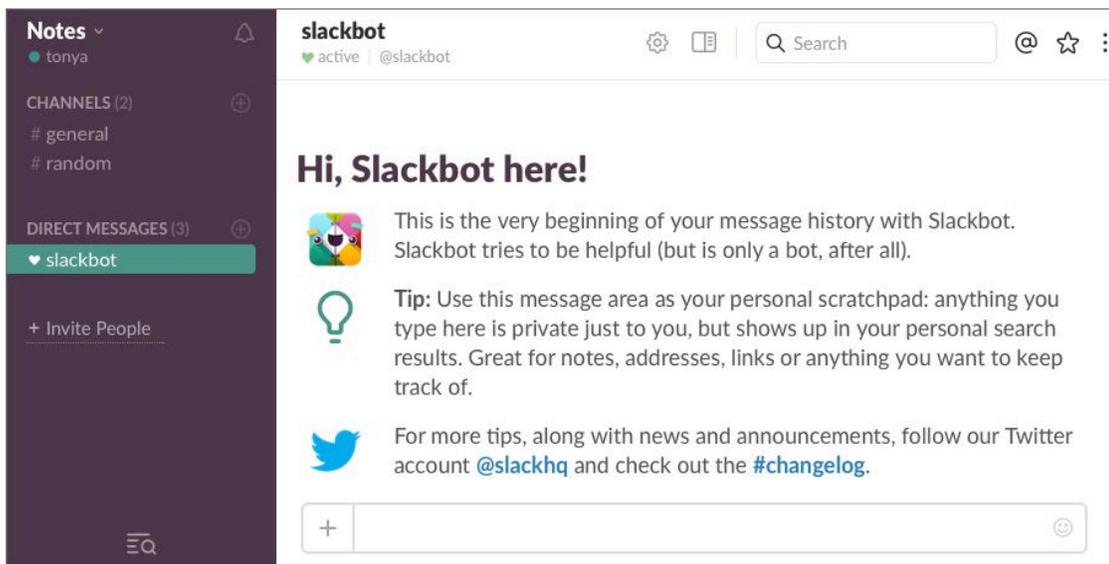
3. Next, pick a name. This name is shown everywhere a user sees a reference to the team (**Figure 3**, left). You can change it later, so don't worry too much about whether it's perfect for now.



**Figure 3:** Name your Slack team (left); the Web site for a team has a unique subdomain (right).

4. Enter the subdomain name for what will effectively be your team's own Web site (**Figure 3**, right). After you type a name, Slack will inform you if it's in use; a green checkmark appears on an available choice. Again, you can change the URL later.
5. Enter your name and username, and click Next.
6. Slack displays a confirmation page that lists all the details you've entered. If you need to change anything now, click its Edit button. If it all looks good, click the Create My New Slack Team button.
7. Slack asks you about sending invitations. It's fine to add users now, if you know what you are doing, but you might prefer to wait. I talk more about types of users and invitations later in this book, in [Understand User Types](#). Either add users or just click Skip for Now.

The Slack Web app takes you to the same view that any new member of the team would see. In the sidebar, the two default Slack channels, [#general](#) and [#random](#), are available, and under Direct Messages, Slackbot is selected (**Figure 4**). (Slackbot is Slack's built-in bot; every user has their own private direct messaging conversation with Slackbot.)



**Figure 4:** In this new team, the owner's username (tonya) appears just under the team name at the upper left. The default [#general](#) and [#random](#) channels are listed in the sidebar, as well as tonya's initial direct message conversation with Slackbot.

8. Check your email. You should have a message from Slack asking you to set up a password to go with your new Slack account. Follow the directions in the message to create your password.

### Importing Messages from Slack and Other Services

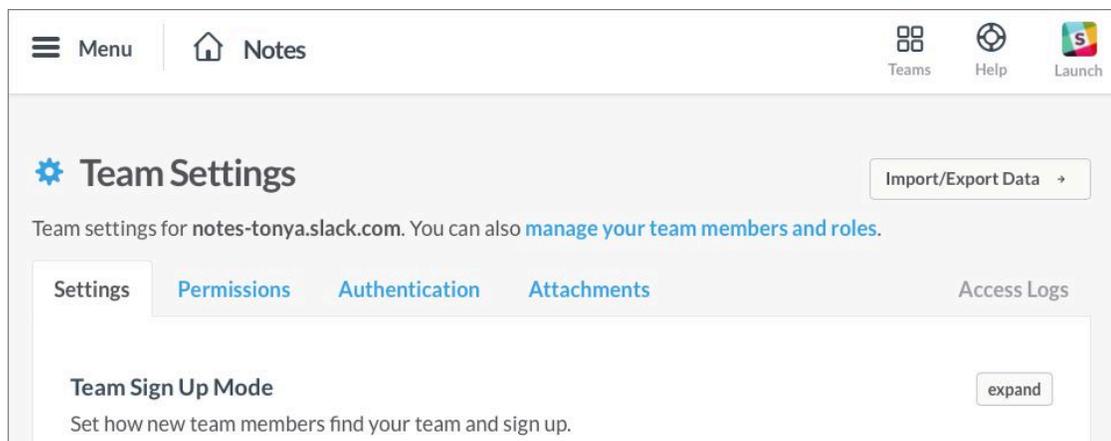
Slack lets you import messages exported from another Slack team (see [Export Messages](#)), and from a few popular services like HipChat and Campfire. You can even import a comma-separated values (CSV) file that conforms to Slack's import format. I don't know how well the conversion works, but Slack provides [detailed help](#).

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## Find Team Preferences

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Now that you've created your team, you can manage it in Slack's Web app. In addition to the interface where you interact with your team, shown in the figure just above, the Web app has another interface where you set preferences, shown in **Figure 5**.



**Figure 5:** The face of the Web app for preferences looks rather different from that used for team interactions.

If you have the Web app open from the steps just above, to reach the Slack preferences, click the team name near the upper left and choose a settings-related item from the lower portion of the menu, such as Team Settings. Or, to access the settings by with a URL, enter [team-name.slack.com/admin/settings](#) in the Web browser's address field.

All of Slack's various preference pages can be accessed by URL, but you can also get to them by clicking the Menu  button at the upper left. In particular, under Administration, notice Team Settings, Manage Your Team, and Billing.

To return to the team-facing side of the Web app, click the Launch  button at the upper right.

### Slack URLs in This Book

I sometimes link to a Slack preference page, such as the [Team Settings](#) page, using an underlying URL of the form [my.slack.com/admin/settings](#). The [my](#) part redirects to your currently selected team in the Web app. If you belong to more than one team, you can switch using the Teams  button on the toolbar.

**Note:** Yet another unique interface in the Slack Web app—one you'll use much less frequently than the two shown so far—is the [App Directory](#), where you install and manage integrations. You can also find it by clicking the Menu  button at the upper left of the Web app preference interface and choosing Configure Apps. For more about Slack's App Directory, see [Add Integrations](#).

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## Pick Free or Paid

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Slack has a generous free tier, which may be sufficient to meet the needs of social groups and many work-related groups.

**Tip:** Qualifying non-profits get access to Slack's Standard plan at no cost, while qualifying educational institutions pay 85 percent of the commercial price. For details, read the Slack help documents, [Slack for Nonprofits](#) and [Slack for Education](#).

Slack isn't cheap for everyone else, however. Slack currently offers two paid tiers: If you pay annually, Standard costs \$80 per year for each user, while Plus costs \$150. In a modest team with 15 members that's \$1200 per year for Standard or \$2250 for Plus.

Those costs might be reasonable for a small organization, but consider a business that needs 200 accounts, the cost for which adds up to \$16,000 per year for Standard or \$30,000 for Plus. Some organizations I know that have a large number of remote workers or no central office say that Slack is their single biggest expense outside of labor.

### **What You Get with Plus**

Slack's Plus plan provides all the features of the Standard plan that are listed in the [Pricing Guide](#), along with:

- ✦ 10 GB of storage per user, up from 5 GB
- ✦ SAML-based single sign-on (SSO), which is useful for integration with a greater array of corporate directory services
- ✦ Compliance exports of all message history
- ✦ Support for external message and archival solutions
- ✦ 99.99 percent guaranteed uptime service level agreement (SLA)
- ✦ 24/7 support with 4-hour response time
- ✦ User provisioning and deprovisioning
- ✦ Real-time active directory sync with OneLogin, Okta, and Ping

These features are primarily of interest to larger, more technically adept organizations that depend on Slack. You can always start with a Standard plan and later upgrade to Plus, or even to the Enterprise plan that's slated to be unveiled later in 2016.

Happily, while many business-oriented software systems require purchasing per-user subscriptions in certain quantities, like 100- or 1000-user increments, Slack charges only for active users who are either full members or multi-channel guests, described in detail in [Understand User Types](#). A user is considered active if they have accessed Slack in the previous 14 days. If not, that user is inactive for billing purposes, and their cost is pro-rated—automatically. The reverse happens when that user next logs in to Slack.

Free and paid teams differ in a few key ways:

- Free teams are limited to a chronological history of 10,000 messages. Older messages are neither displayed nor appear in searches, but they're not deleted. Paid tiers have access to 100 percent of everything ever posted. If you upgrade from a free team to a paid team, all old messages become accessible.
- Free teams can store a total of 5 GB of attached files for the entire team. Standard teams get a 5 GB allocation per user; with Plus, it's 10 GB per user.
- Only paid teams can opt to have all messages (public and private) deleted a set period of time after they're posted (from a day to several years), retain a log of all edits and deletions, and (with Plus teams) export all messages, including private ones.
- Free teams can add only ten integrations; paid teams have no limits.
- Members of free teams can voice-chat one-on-one using the Calls feature, while members of paid teams can voice-chat in groups of up to 15 users.
- In paid teams, you can more easily compartmentalize user access by having guest users: these users can be single-channel or multi-channel. (I explain the types of guests in [Understand User Types](#), next chapter.) Paid teams get five free single-channel guests per paying full member or multi-channel guest.
- Paid teams can make and mention user groups that contain full members, so a bunch of people can be addressed at once through a group @mention, like [@editorial](#). (Guests can't be part of groups.)
- On any team, free or paid, users can opt to sign in with two-factor authentication (2FA). On a paid team, 2FA can be required.
- With a paid team, you can set up single sign-on (SSO). SSO is used in small and large organizations alike to give users access to multiple systems via a single username and password.

Standard Slack teams can let a user authenticate with a Google account, or they can use Google's paid Google Apps for Domains to provide Slack access to the group's users. Plus teams gain enterprise-level SSO, with Slack supporting directory services that comply with the industry-standard SAML (Security Assertion Markup Language).

To start the process of paying for your team, visit to the [Billing](#) preference page (if you need help loading the page, see [Find Team Preferences](#).)

### **Downgrading from Paid to Free**

You can downgrade a team from paid to free, just as you can upgrade from free to paid. Slack notes that a downgraded team's messages above 10,000 are retained (just as with free teams), but you'll have to pick which integrations to disable above the ten allowed for teams, and which files to delete beyond the 5 GB limit for the entire team.

Multi-channel guests can be deleted or converted into full-access members, while single-channel guests are removed.

To make the switch, go the [Billing](#) preference page. On the Overview tab, click "change plan" and choose the option that best meets your needs from the Change Your Plan pop-up menu.

# Manage Users

If you're excited about creating user accounts before you know every detail of how to configure them, you can jump ahead to [Invite Users](#), later in this chapter. However, if you read this chapter in order, you'll start by learning about the different Slack user types and then you'll see how a handful of key customizations can help bring in new users smoothly and create a good first impression for them. At the end of the chapter, I offer advice on how to [Handle Users](#) once they've joined.

**Note:** Later in this book I talk about how to [Build Channels](#) and [Work with Integrations](#), so if you want to take care of either of those tasks before inviting users, feel free to proceed in whatever order makes the most sense to you.

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## Understand User Types

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Each type of Slack user has different levels of permission for what they can do and what data they can access.

Like most administered products, Slack has a hierarchy of users:

- **Owner:** The primary owner handles payment (if any), sets overarching security and login policies, and manages other high-level details. A team can have more than one owner, but only one can be the primary. The primary is usually the person who created the team and is the only person who may delete the team.
- **Admin:** Just below owners in the hierarchy are *admins*. Admins manage members and channels, and have access to many settings and tasks. Owners can choose to reserve some administrative behavior to themselves and vest one or more admins with less, but still significant, authority.
- **Member:** Members can post messages in any public channel and send direct messages to any team member. Admins may remove

default admin-like privileges from members as a class, such as allowing members to create public channels or add integrations.

- **Guest:** Guests, available only for paid teams, must be invited to channels and typically are excluded from any enhanced privileges granted to members. I explain single-channel and multi-channel guests next.

**Note:** For a full list of which permissions are granted to which kind of users, see Slack's [Roles and permissions in Slack](#) help page.

## More about Guest Users

With guest users, a paid team can bring in outsiders—consultants, partners, or freelancers—without granting them access to every public channel in the team, or it can sequester a group of people into what are effectively sub-groups.

Guest users can see only the channel or channels to which they've been invited. Regular members can view guests in a separate tab in the Team Directory in the desktop and Web apps, but guest users can't see the team directory.

Guest users are also limited in what changes they can make to a Slack team: they can't create, rename, archive, or delete channels, for instance, and they can't add customizations like team loading messages. They also can't use custom or integration slash commands. Guests can't be added to user groups, either.

A paid team can have two types of guests:

- **Single-channel guest:** As you would expect, a single-channel guest can belong to only one channel. Single-channel guests can be added to the `#general` channel as their only channel, which essentially gives them access to all the team members and the entire team's public profile information. (If you want to add a single-channel guest to more than one channel, you have to make them a multi-channel guest or a member.)

# Build Channels

Every team needs a set of channels in which to talk. A team admin can seed their Slack team with the channels their users need. In this chapter, I'll offer some planning tips, explain how to [Create a Channel](#), and help you [Adjust Channel Permissions](#).

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## Plan Channels

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For most modestly sized groups, up to about 20 or 30 members, [#general](#), [#random](#), and a handful of custom channels will be sufficient. But in larger teams, discussions quickly become unwieldy without more division.

Here are some points to consider:

- Guests cannot create channels, but full members can (unless an admin changes the settings). Allowing members to create channels can be very handy (and reduce your time burden), but can also cause confusion. If you want to limit channel creation to admins and owners—or just owners—see [Adjust Channel Permissions](#), later in this chapter.
- You can name a channel anything, so long as it conforms to Slack's rules: no more than 21 characters, all lowercase, and no spaces or periods. But consistent naming will help your group if it has more than a handful of channels.
- Channel names appear alphabetically in Slack's various lists. A scheme that takes this into account will help team members find the right channel quickly. For instance, if you have multiple departments, you might want to use a prefix, like [eng](#) for the English department and [sci](#) for the Science department. Then instead of [#general-eng](#) and [#general-sci](#) channels, which sort by "general," you'd see [#eng-general](#) and [#sci-general](#).

- Public or private? Channels can be public or private, and you might have good reasons to not let everyone in a team read everything. Public channels are searchable and joinable by every full member. In contrast, private channels and their contents are restricted to those who are invited by members of the channel.

Before you create a private channel, make sure that what you want isn't a multi-party direct message conversation, as I discuss in the sidebar below.

### **Conversations vs. Private Channels**

Normal channels are available to all regular team members, so they aren't especially private. However, private chatting can take place in any direct message conversation (these allow up to nine participants), as well as in private channels. So how do private channels and direct message conversations compare?

In both cases:

- ✦ No one can simply join; they must be invited.
- ✦ Only invited members can see that the channel or conversation even exists.
- ✦ Only participants can search the archives.

The differences turn out to be slight but important:

- ✦ Private channels (like public channels) can be named; group conversations instead show all the names of the participants.
- ✦ Conversations are limited to no more than nine people.
- ✦ When people are added to an existing conversation, Slack creates a new conversation and new members don't get access to previous messages. With private channels, that's an option, but their message history can also be made available to newcomers.
- ✦ When someone leaves a private channel, they lose access; it's not possible to leave a conversation.

Slack says that conversations are better for quick informal messages with a small number of participants, while channels are better for larger groups and persistent discussions.

# Work with Integrations

The Slack ecosystem has long offered *integrations*, which are ways to tie external services to Slack teams. These connections can be with widely available, pre-existing services, like Google Drive or Crashlytics, or designed to work exclusively with Slack, like Workbot. In late 2015, Slack added support for *bots*, a special type of integration that can interact directly within a team.

**Tip:** With a little programming knowledge, you can use Slack's API to write your own integrations that connect services you use in-house or another third-party service (using its API). With a lot of programming knowledge, you can build elaborate integrations and bots. For details, see [Slack's API guide](#).

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## What Integrations Are Available?

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Hundreds of integrations are available, and as millions of people join Slack, we're likely to see many more. Because there are so many, I can provide only an overview and some ideas, rather than an exhaustive rundown. For a more complete list, refer to Slack's [App Directory](#).

Because you're administering a team, you have two kinds of integrations to consider: those that help people on your team do their jobs and those that help you do your job. Let's look at popular options in each category.

### Integrations to Help Your Team

Some major categories of apps will appeal to many teams:

- **Audio and video conferencing:** This category includes [Google Hangouts](#) and [Skype](#), as well as [Room](#), [Zoom](#), and [appear.in](#) (which would be a good name for a rock band). (Your team can also use Slack's built-in Calls feature, which is currently in beta. You can turn it on in the Calls preference on the [Team Settings](#) page, in the Settings tab.)

- **Chat connections:** Several integrations provide live text conversations with customers or connect with other chat tools, including [Sameroom](#) (for Skype, HipChat, and others), [Chatlio](#), and [Slaask](#).
- **IRL:** A variety of integrations can order an in-real-life (IRL) service from within Slack. Want a [Lyft](#)? To have a concierge like [Emma](#) solve your travel problems? Slack can do those things and more.
- **Developer tools:** It should be no surprise that many services aimed at developers now offer Slack integrations. These include [Github](#), [New Relic](#), and [Pingdom](#).
- **Office:** Slack can help track who is in and who is out, monitor time spent on projects, put events on group calendars, help with leave planning, and lots more, thanks to integrations like [Meekan](#), [Timetastic](#), and [Calamari](#).
- **Project management:** Popular project management services like [Asana](#), [Trello](#), and [JIRA](#) have integrations that push task updates into Slack. And Slack can be used in various ways to update tasks in those systems, too. For instance, in the business version of Trello, if you drag a Slack message's time stamp into an open card in the Trello Web app, Trello inserts the message text into the card's discussion.

## Integration to Help Admins

Some integrations help you with admin tasks when you're in charge of more than just Slack. You can use Slack as a centralized place to access information about events occurring elsewhere. Some admins write custom scripts that tie into Slack, but there are many commercial integrations available:

- **Analytics:** It's often useful to direct information about server traffic directly into a channel. Products like [Chartbeat](#) and [Statsbot](#) (for Google Analytics) can help.
- **Email:** [Zapier](#) can act as a conduit to route incoming email from any account into Slack (it offers extra features for Gmail accounts). A Zapier "zap" can help centralize responses from various services

# Manage Messages

Slack lets team owners and admins limit certain kinds of activities related to messages, enabling you to solve a potpourri of problems that revolve around retaining, editing, deleting, and exporting messages and files. This chapter starts broadly with the team-wide topic of how to enforce a retention policy. It then narrows its focus to discuss how to [Set Editing and Deleting Permissions](#), [Delete Messages and Files](#), [Export Messages](#), and [Block Images and URLs](#).

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## Configure a Retention Policy

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Many organizations have retention policies that require them to keep all messages and modifications to messages exchanged among employees (as well as volunteers, vendors, and contractors), as well as any files uploaded. This can occur, for example, in government because of sunshine or freedom-of-information laws.

On the other end of the spectrum, some organizations have established a time period beyond which messages and files must disappear entirely. This is in part to reduce business risk and costs around lawsuits. Companies that have a routine deletion policy simply can't produce messages that could be used against them in court later—or that would be costly to sift through and share.

Only owners can modify a team's retention policy and only then in a paid team. Go to the [Team Settings](#) preference page, on the Settings tab, to enforce your team's policy for both message and files.

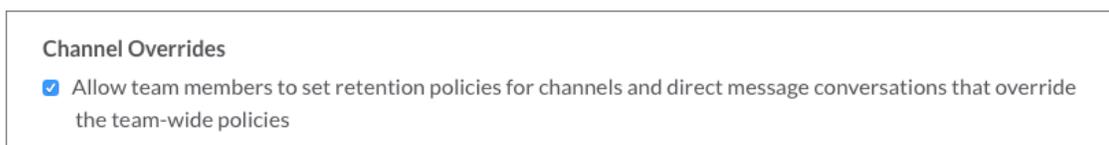
## Message Retention

An owner can expand the Message Retention preference and then pick among the following for messages in each of public channels, private channels, and direct message conversations:

- Retain all messages (the default). Messages may still be edited and deleted, but all non-deleted messages persistent indefinitely. But you have two alternatives that modify what “all messages” means: either pick the next option, which tracks all changes, or disable message editing and deletion, described just ahead.
- Retain all messages as in the previous point, but also log all edits and deletions. (This setting meets some compliance rules.)
- Retain messages and edit/deletion logs for only a specific number of days. Messages are permanently deleted as they pass that limit. (The range can be set for as short as 1 day up to any number of days—Slack doesn’t offer an upper limit. This setting can help you team comply with some deletion policies.)

Owners may override these retention settings at any time for an individual public channel or any conversation or private channel to which they belong in the Message Archives. There is a handy link for that at the top of the Message Retention preference—once in a channel or conversation, click “Configure message retention.”

By default, a team member may override the team’s retention settings for a *private* channel or conversation of which they are part—they can click a time stamp in the message list to view the Message Archives where this override control is accessible. Owners can remove this override ability by unchecking “Allow team members to set retention policies for channels and direct message...” (**Figure 24**).



**Figure 24:** Selected by default, the Channel Overrides checkbox controls whether team members may override the owner’s message retention policy for their private channels and conversations.

# Create Culture

Every community, whether online or in “meatspace,” has implicit rules of behavior, and many have explicit rules as well. Explicit rules may appear easy to follow, because they’re stated outright. In contrast, implicit rules may seem tougher to abide by, as users must intuit them or ferret them out, yet people may receive more rewards for conforming to or at least understanding these subtle cues than being a follower of published rules.

Being a member of a Slack team requires more understanding of culture than most online groups. Why? Because Slack teams are intentional: Every member is invited or allowed to join. Any message that causes offense, a rift, a fight, or mistrust could have repercussions that would affect the team indefinitely.

It’s possible you’ll have a team full of people used to going hammer and tongs with others on Reddit, Twitter, Facebook, or elsewhere. The same behavior that might be seen as being within the bounds of civil-yet-vociferous discourse in such venues could be a horrible breach of etiquette or terms of employment in your Slack team.

To encourage your team members to interact with one another in appropriate ways, you can provide written rules, [Identify Problem Solvers](#) who can resolve interpersonal disputes and encourage civil behavior, and [Use Slack to Promote Good Behavior](#) with a few clever uses of Slack’s internal features.

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## Write Rules

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Not all teams need guidelines, but if you have more than a handful of people who aren’t at the same organizational level and who don’t already interact routinely in physical spaces or with other electronic means, a set of written expectations can be useful.

In a club, you might have officers, paid or volunteer staff, and members; in a business, owners or executives, managers, and workers; and in an academic setting like a college you might have a mix of students, professors, and staff, or in K-12, a mash-up of administrators, teachers, staff, and parents.

Also, some people will likely be less experienced than others in participating in online forums and may need more guidance—written rules help.

**Note:** Do you have non-neurotypical people in your team? (If you're unfamiliar with the term, there's [a PBS special](#) that goes into depth about it.) For people in this category, intuiting social rules is difficult or impossible, putting them at a disadvantage in group situations. Explicit rules help such team members.

**Note:** The main argument against written rules is that some organizations have busybodies who cause tension by referencing formal policies in nearly every situation, when less rigid interpretations would defuse disputes or improve overall interactions.

These rules do not need to be a 20-page policy manual! And some companies, especially large ones, may already have policies that cover such things as group forums, in whatever system those discussions might occur. You could almost certainly start with some simple guidelines that would contain a half dozen key rules. These might include appropriate limits on conversation, the kind of language expected (G, PG-13, or R could be useful pegs), an expected code of conduct, and how disputes will be handled.

# Train Users

Your users will have a better time in Slack—and ask fewer questions!—if they feel comfortable with Slack’s basic features. Plus, your organization will get more out of Slack if users are aware of key productivity tips (like pressing the Up arrow key to quickly edit a just-posted message). If you’d like to provide training, we have options for you.

## Share a Cheat Sheet

We’ve developed a free, one-page handout in PDF format. Download it [here](#), and you can print copies for colleagues, send it to them via email, or just pop it in a Slack channel!

## Order Take Control of Slack Basics in Bulk

The ebook [Take Control of Slack Basics](#) helps users get started in Slack and explains all of Slack’s key features—channels, notifications, @mentions, reactions, search, attachments, and more. We offer a generous bulk discount so that you can buy copies for your entire team.

## Download Training Materials

You can download a free [presentation](#) about Slack in PDF format, with the option to buy an editable PowerPoint or Keynote file—[contact us by email](#) for that. This presentation can be given on its own, but it assumes that you’ll be switching between it and Slack, so that you can present from the slides and demo the features that are most important to your group. Be sure to download the [cheat sheet](#) to use as a handout.

## Hire the Author

For the ultimate experience, you can hire Glenn Fleishman to speak to your group—via Slack! You can invite him as an in-team single-channel guest to answer questions or lead a discussion. He’s also available to consult for group calls (via Slack or otherwise) and for remote video Q&A sessions or presentations. He can even customize a presentation to meet your organization’s needs and work with you to develop effective ways of using Slack. For more information and a price quote, please [contact Glenn](#).

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## About the Author

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Glenn Fleishman developed a passionate interest in typewriters and typing at a young age, which led to his becoming a typesetter and graphic designer. Somehow, he wound up as a technology journalist, and has written thousands of articles over decades for publications like the *New York Times*, the *Economist*, *Macworld*, and the *Atlantic*. He's also written dozens of editions of books for Peachpit Press and in the Take Control series.

Glenn has devoted his career to writing that helps people understand and better use technology. He lives in Seattle with his wife and two children and many, many mobile devices and computers.

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## Shameless Plug

Glenn is also the author of [\*A Practical Guide to Networking, Privacy, and Security in iOS 9.\*](#)

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## About the Publisher

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