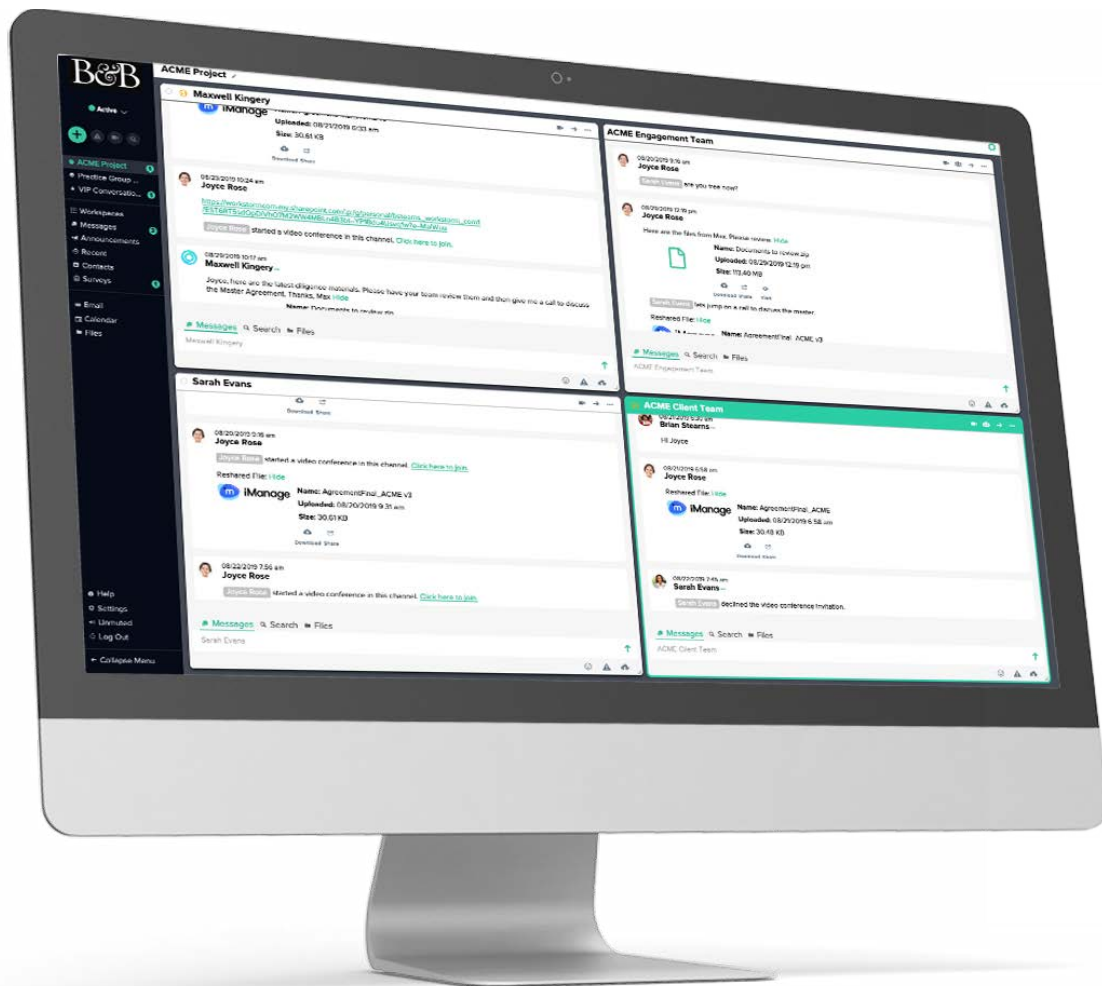


WORKSTORM™

User Guide



Serious collaboration for serious business.

INTRODUCTION

With Workstorm, hard work just got a little easier. This user guide is designed to help new members get up to speed quickly. Because work takes collaboration, but collaboration shouldn't take work.

CONTENTS

03-05 Account Setup

- Profile

- Notifications

- Password reset

- 2FA Set Up

06-18 Messaging

- Private Messages

 - Video Conferencing

 - File sharing

 - Alerts

 - Urgent messages

 - Mentions

 - Emojis, YouTube and GIPHYs

 - Reactions

- Team Messages

 - Join a team

 - Create a team

 - Manage team

 - External Members

19-28 Additional Features

- Workspaces

- File management

- Email/Calendar Integration

- Announcements

- Recent

- Custom Status

- Surveys

- Search

- Workstorm Bot

- Desktop and Mobile app

ACCOUNT SETUP

[Sign up for Workstorm](#) via the email invite from support@workstorm.com, sent to you by your site administrator or colleague. After accepting the invite, you will be redirected to create a password and log in.

PROFILE

Select [Settings](#), then [Profile](#) in the left menu to customize your profile and click on [Display](#) to adjust font size across the platform to your preferred value

The image displays three screenshots of the Workstorm account settings interface, illustrating the steps to customize a user's profile and display preferences.

Top Screenshot: Profile Settings

- The left sidebar shows the **Account Settings** menu with **Profile** selected under **PERSONAL SETTINGS**.
- The main content area is titled **Profile** and includes the instruction: "Enter your contact details and upload a picture for your account."
- The **Personal Information** section contains a **Save** button (highlighted with a red box) and a form for contact details.
- The form fields include: **Email Address** (sarah.evans384@gmail.com), **First Name (required)** (Sarah), **Last Name (required)** (Evans), **Job Title** (Associate), **Work Phone** (312-867-5309), and **Internal Extension** (123).

Middle Screenshot: Photo Upload

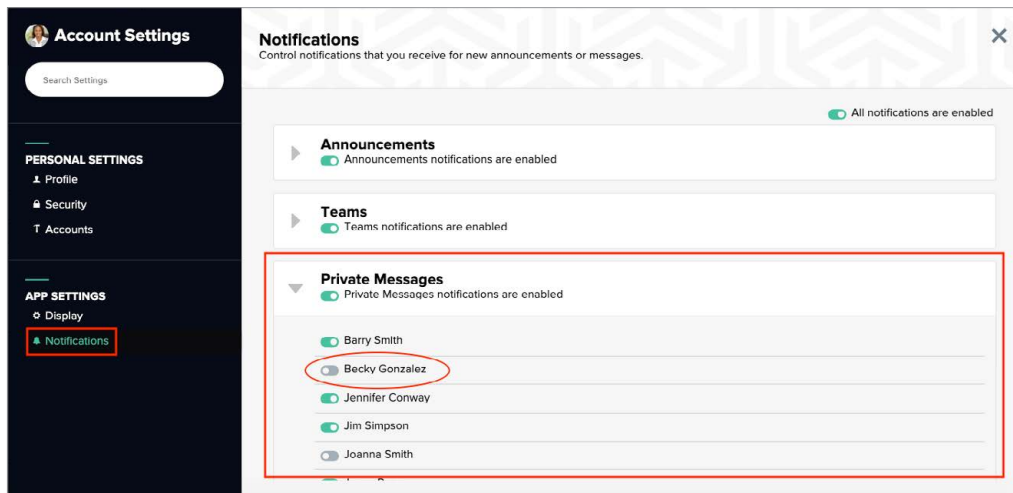
- The left sidebar shows the **APP SETTINGS** menu with **Display** selected.
- The main content area is titled **Photo** and includes the instruction: "Upload a profile photo."
- A photo of a woman is shown in a preview window (highlighted with a red box).
- Below the preview are buttons for **Select image** and **Save Image**.

Bottom Screenshot: Display Settings

- The left sidebar shows the **APP SETTINGS** menu with **Display** selected.
- The main content area is titled **Display** and includes the instruction: "Set your display preferences for your account."
- The **Font Size** section features a slider (highlighted with a red box) to adjust the font size.
- The **Code Snippet Color** section shows a preview of code snippets with a color scheme applied.

NOTIFICATIONS

Select **Settings**, then **Notifications** to enable or disable push notifications for incoming messages, alerts, and video calls. Customize notification preferences by conversation, as desired. **NOTE: Enabling notifications is recommended to help you never miss a message.**



PASSWORD RESET

Select **Settings**, then **Security**. Update your password regularly for security and to comply with password requirements set by your company.

Account Settings
Search Settings

PERSONAL SETTINGS
Profile
Security
Accounts

APP SETTINGS
Display
Notifications

Security
Manage the security settings for your account.

Password
Set a new password.

Update Password

Current Password

New Password

TOO WEAK

Password Not Strong Enough: keep typing
Password must have a minimum strength of **ADEQUATE**
Ways to make your password stronger:
Add Characters
Include at least one number, uppercase letter or symbol (!@#\$%&').
The more unique characters you add, the stronger it will be.

Retype New Password

TWO-FACTOR AUTHENTICATION (2FA) SET UP

If your Company Admin has already enabled company wide 2FA, then you would have already had to set up 2FA for your account when you logged in for the first time.

If your Company Admin has not enabled company-wide 2FA, you can add extra security to your account by enabling 2FA. Click on **Settings**, then **Security**. Toggle on TOTP if you would like to use the Google Authenticator App for 2FA. If you would like to receive SMS texts with the 2FA code to your phone, toggle on Phone SMS. After toggling on either option, you will be walked through the respective 2FA set up process.

Account Settings
Search Settings

PERSONAL SETTINGS
Profile
Security
Accounts

APP SETTINGS
Display
Notifications

Security
Manage the security settings for your account.

Password
Set a new password.

Update Password

Current Password

New Password

TOO WEAK

Password Not Strong Enough: keep typing
Password must have a minimum strength of **ADEQUATE**
Ways to make your password stronger:
Add Characters
Include at least one number, uppercase letter or symbol (!@#\$%&').
The more unique characters you add, the stronger it will be.

Retype New Password

Two Factor Authentication
Add an extra layer of security.

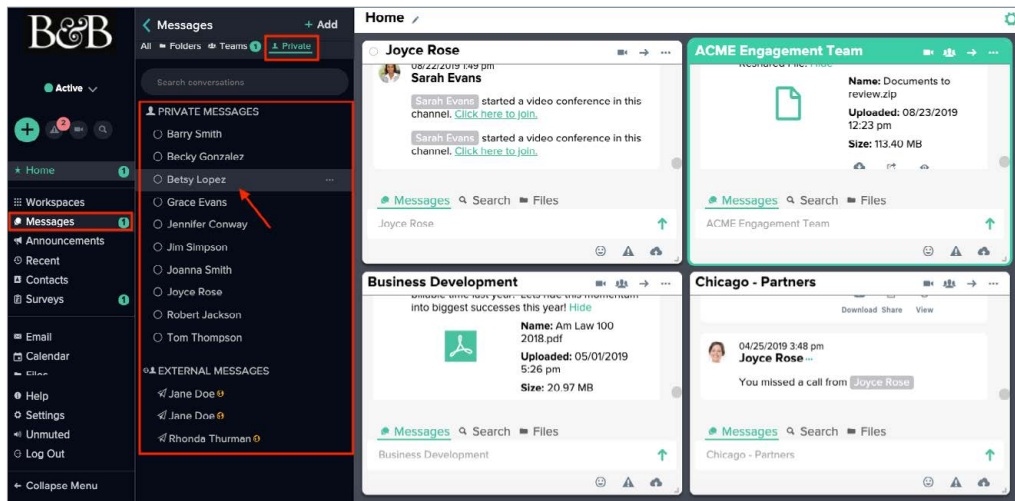
TOTP Authentication
☒ TOTP authentication is enabled
Phone SMS Authentication
☐ Phone SMS authentication is disabled


MESSAGING

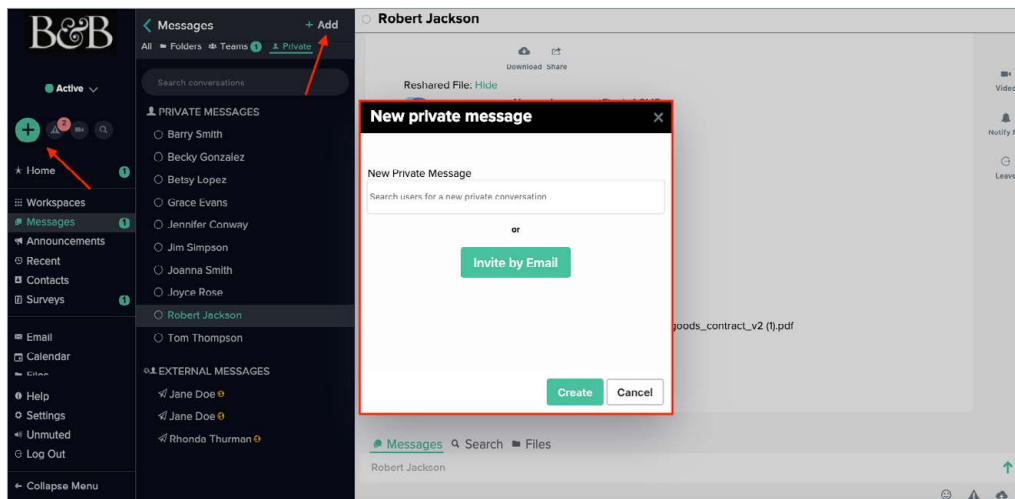
Use Messaging to send private or team messages, share files, host video calls, and more, all within the same secure platform.

PRIVATE MESSAGES

Select [Messages](#), and then [Private](#) in the left menu to see all your existing conversations.

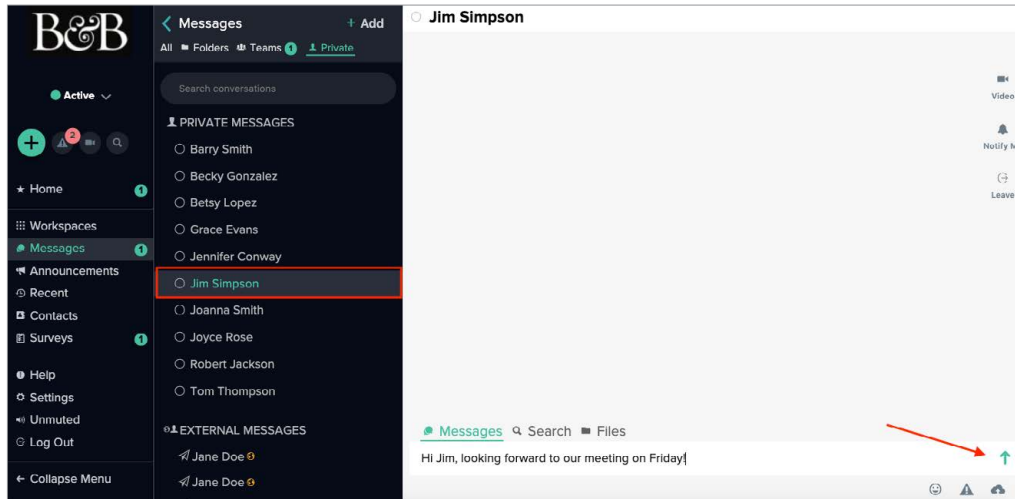


To [start a new one-on-one private conversation](#), you can either select the green plus  icon on your left menu, then [Private Message](#) or select [Messages](#), then the [Add](#) button and [Private](#).




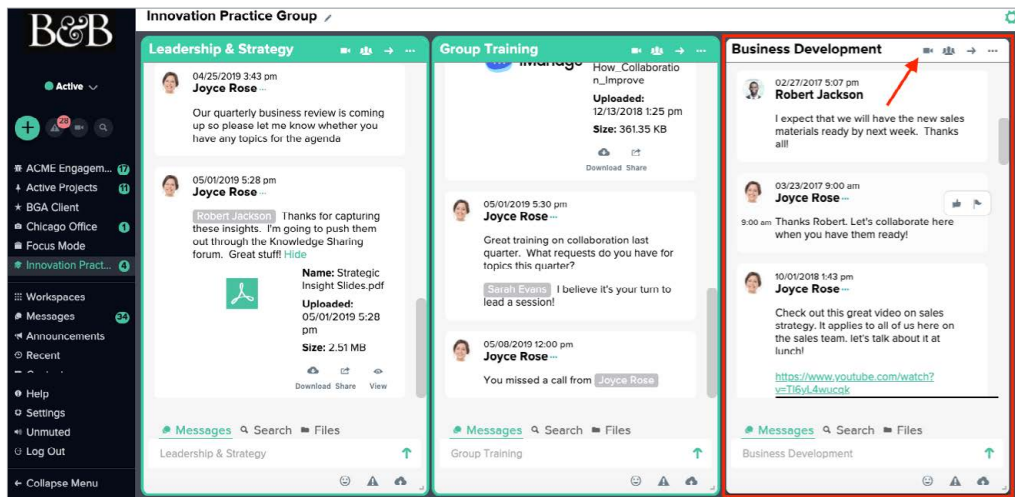
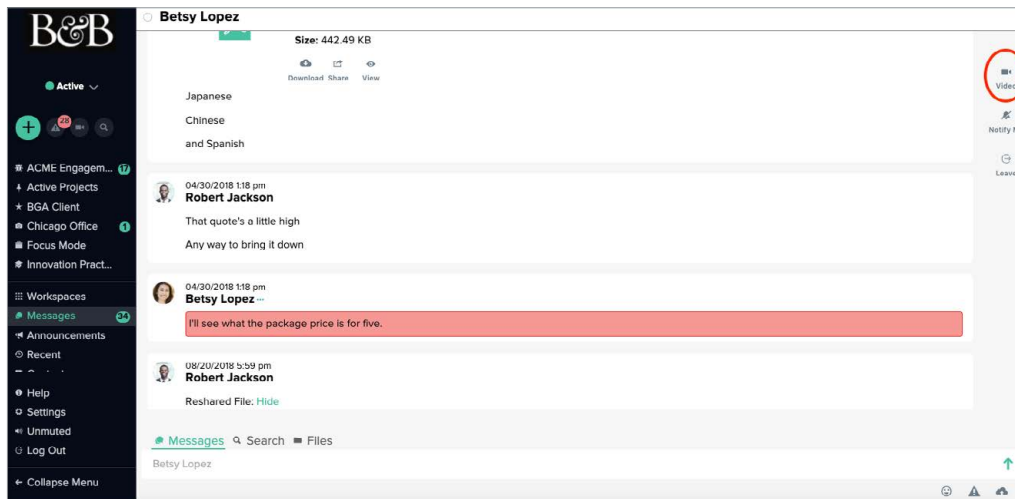
NOTE: For security purposes, only existing members of a company's account will appear in search. If you have permission to invite new or external members, an [Invite New Members](#) button will appear below the search bar. If not, contact your Site Admin for help.

Type a message in the bottom message box, and press **Enter** on your keyboard or select the green **Send** icon to send your message.



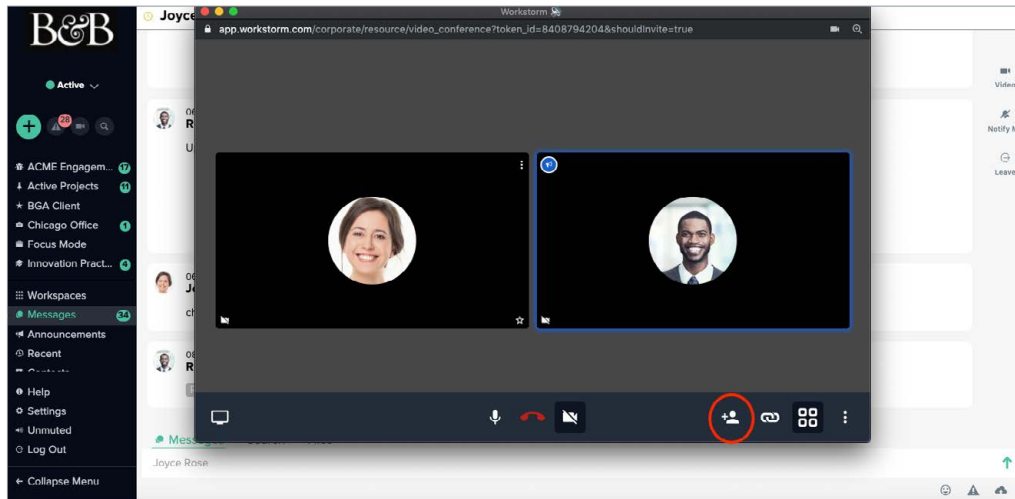
VIDEO CONFERENCING

[Start a video call](#) or share your screen by selecting the  icon on the right toolbar within a private or team conversation or Workspace.

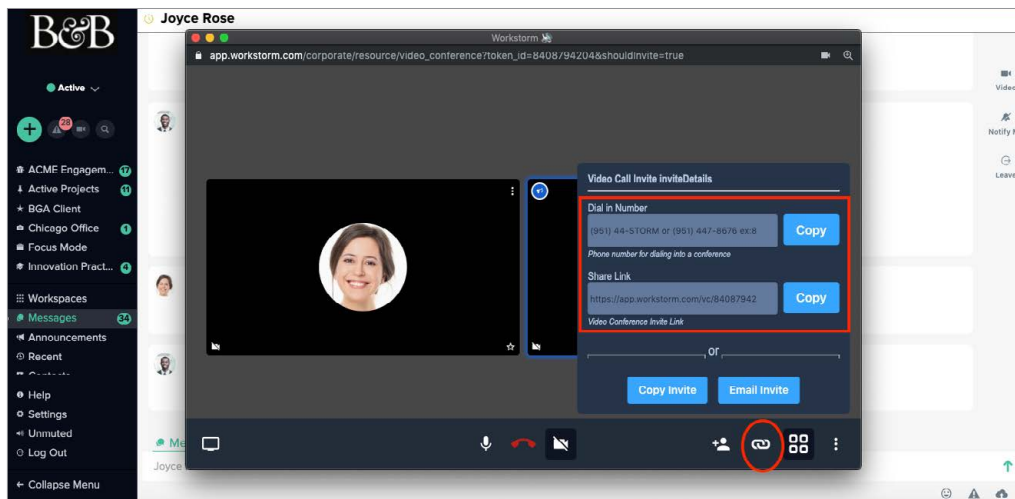


Invite additional participants by clicking the invite icon at the bottom right of video call window. Search for members and select their names to invite them to the call.

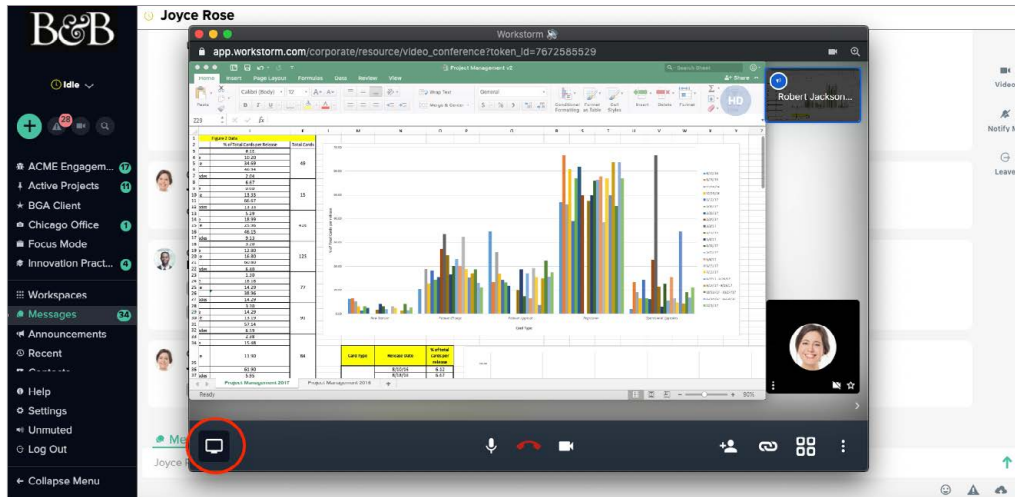
NOTE: The Workstorm Screen Sharing Plugin is not required when using the Workstorm desktop app. Learn more under Desktop App, in the Additional Features section of this guide.



Click on the chain link icon to bring up Dial-In information and a link to the video conference that you can share with colleagues or external parties that need to join the call.




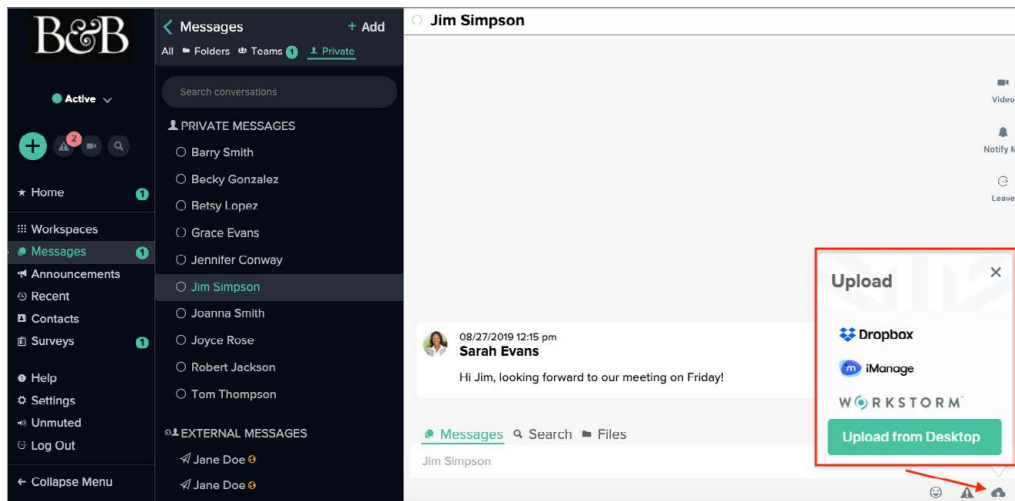
If you would like to share your screen, click the monitor icon on the bottom left of the video call window. Up to 12 people can share their screen at a time.






NOTE: A Workstorm Screen Sharing Plugin is not required when using the Workstorm desktop app. Learn more under *Desktop App*, in the *Additional Features* section of this guide

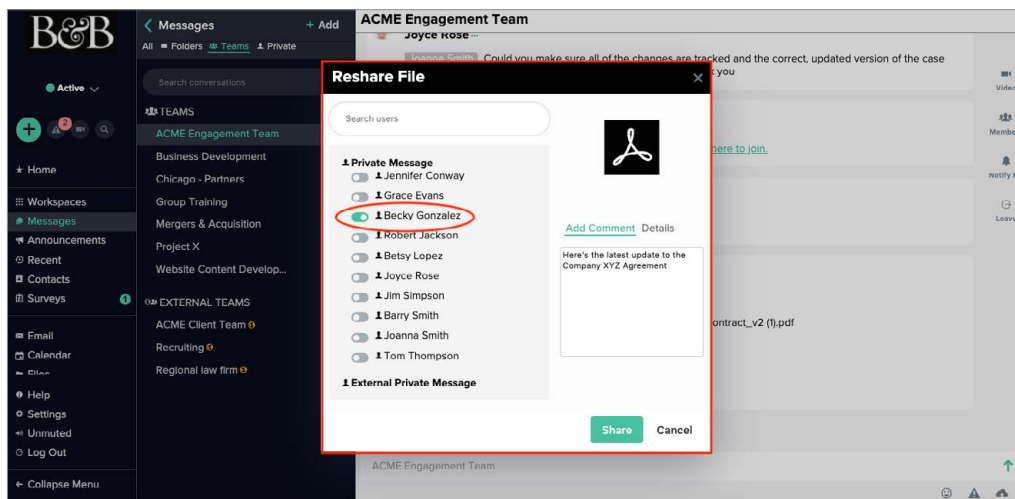
FILE SHARING

[Share files](#) within a private or team conversation by selecting the  icon to open the File Uploader, or drag and drop a file into the message box.

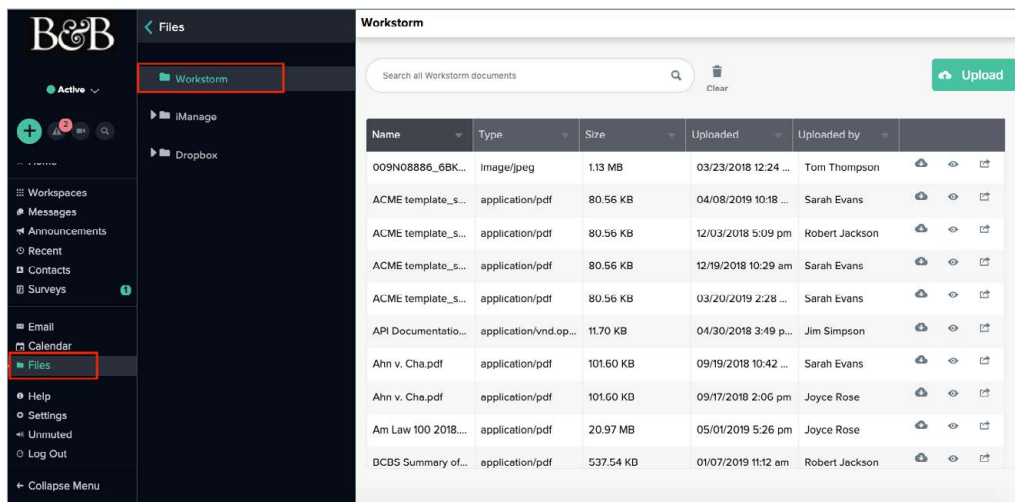


Choose to upload a file from your Workstorm File repository, your Desktop or one of your integrated Document Management Solutions, like Dropbox. Add a comment to accompany the uploaded file in the provided text box.

Preview  , download  or reshare  files shared with you.



Access all of the files you have shared or those that have been shared with you across Workstorm by selecting **Files** and then **Workstorm** to access your Workstorm File Repository. You can search for files using the provided search box at the top left of the page, filter by file type, size and upload date, and you can upload files to store for later use by selecting the Upload icon in the top right.

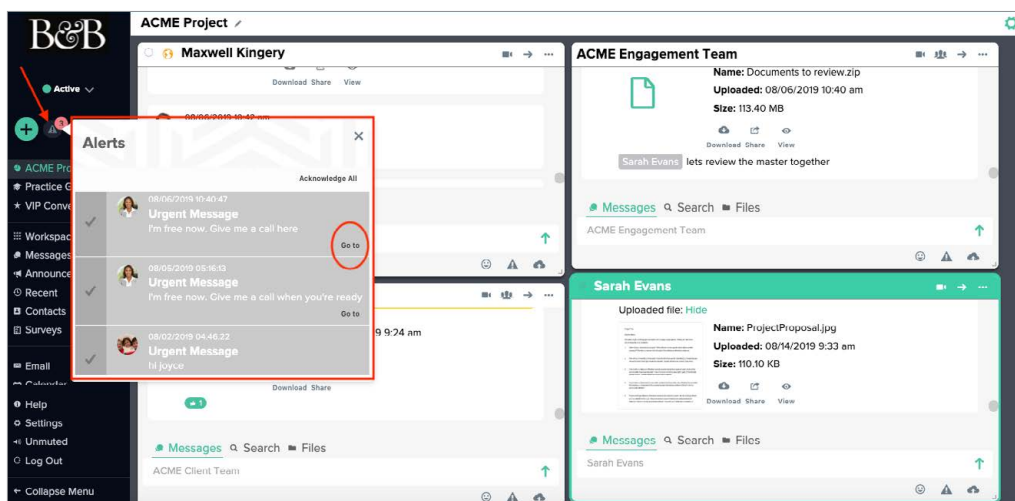


ALERTS

Alerts ⚠ appear in the left menu when you:


- Are added to a team
- Receive an urgent message
- Receive an @mention in a conversation

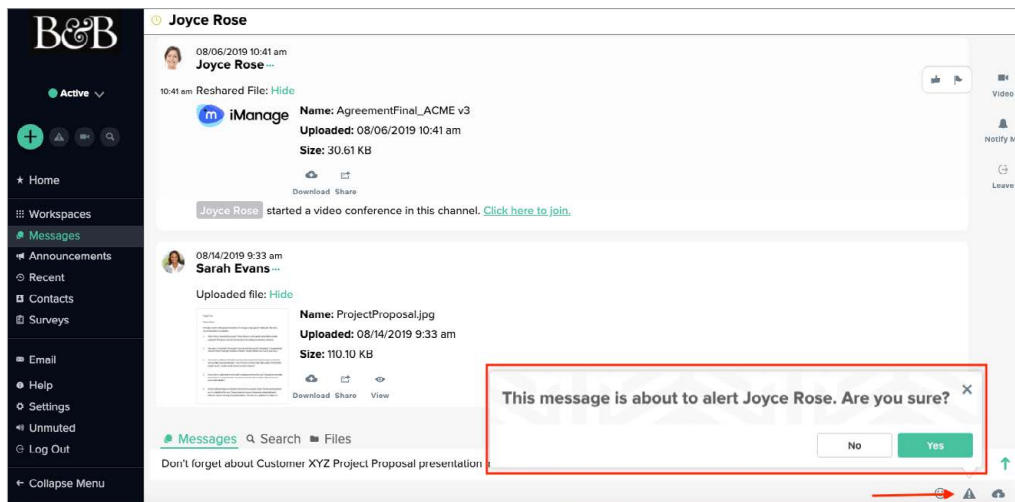
Click on the Alert icon ⚠ near the top of the left menu to access your Alerts menu. You can click **Go To** to see alerts within the conversation they originated from or select **Acknowledge** or **Acknowledge All** to dismiss unread alerts.



URGENT MESSAGES

[Messages sent as urgent](#) trigger an [Alert](#) to the recipient(s).

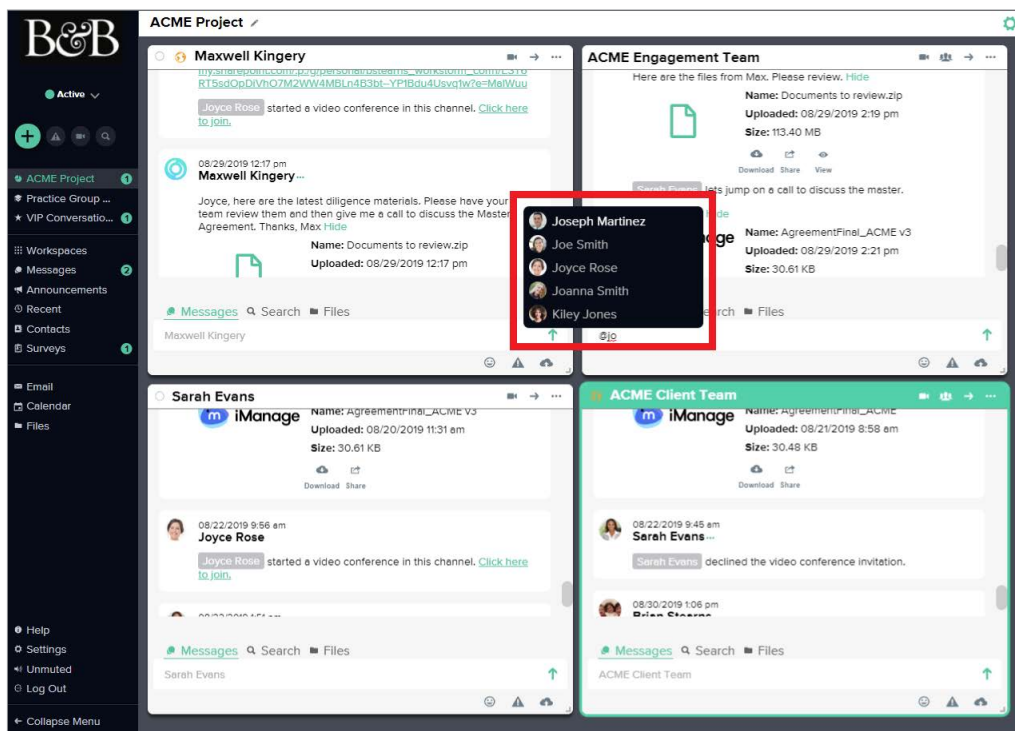
Send urgent messages by clicking the  icon in the message box, instead of pressing [Enter](#) on your keyboard.




MENTIONS

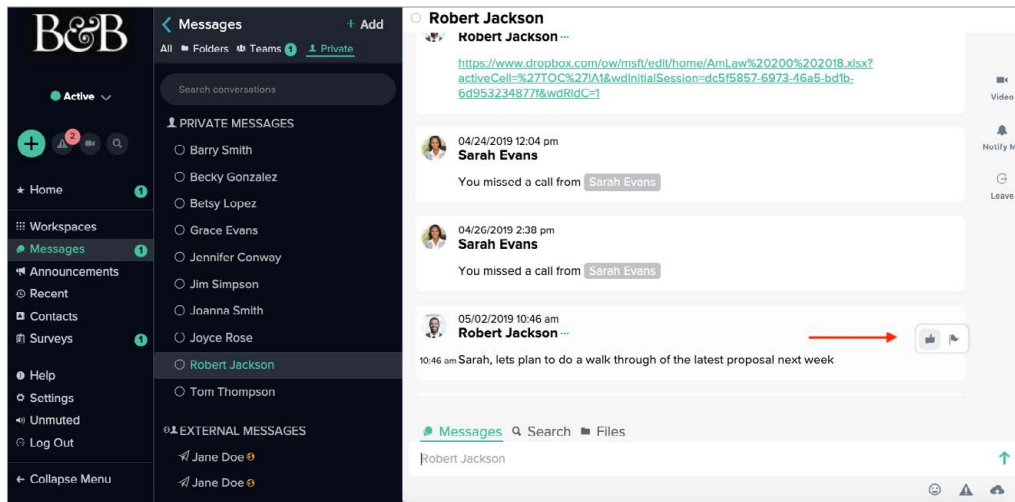
[Use @mentions](#) to trigger an [Alert](#) to an individual member in a team or private conversation.

Type @, the first few letters of a member's name, then select the member from the dropdown list.

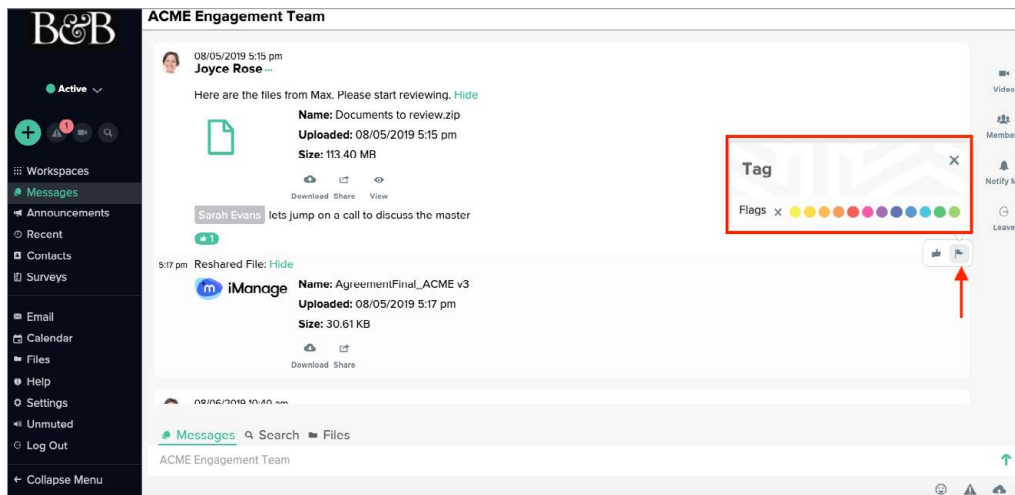


REACTIONS

Show that you like a message by clicking the  icon in the upper right corner.

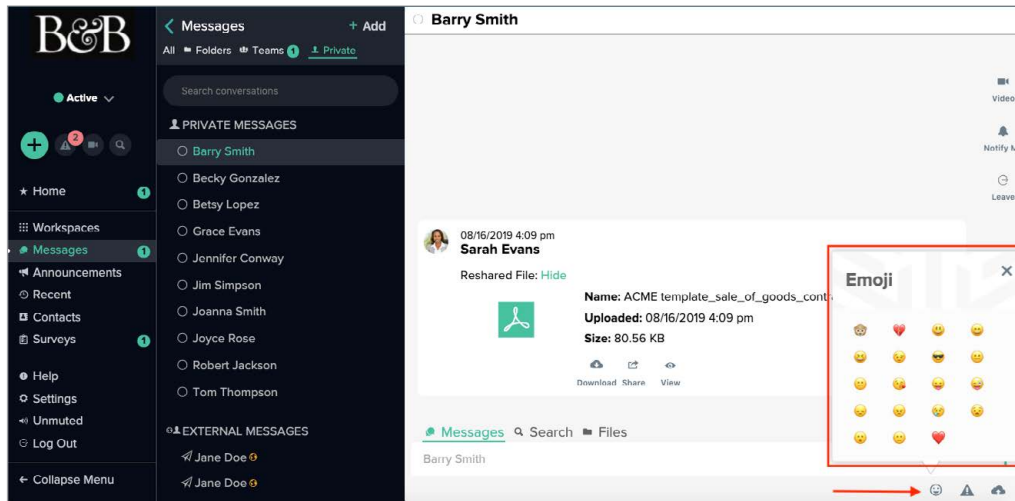


Flag and color-code messages to aid in search by clicking the  icon in the upper right corner of the message.



EMOJIS

Add Emojis to your messages to convey tone or emotion. Select 😊 to select an Emoji, or type ":" and a few letters for a list of suggested Emojis.

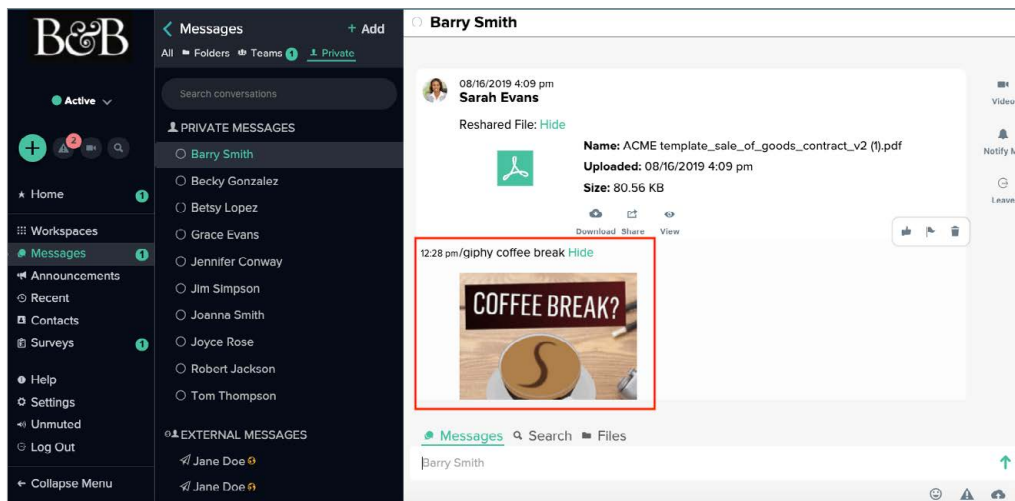


YOUTUBE


Embed YouTube videos in your conversations by copying and pasting the URL into the message box.

GIPHYs

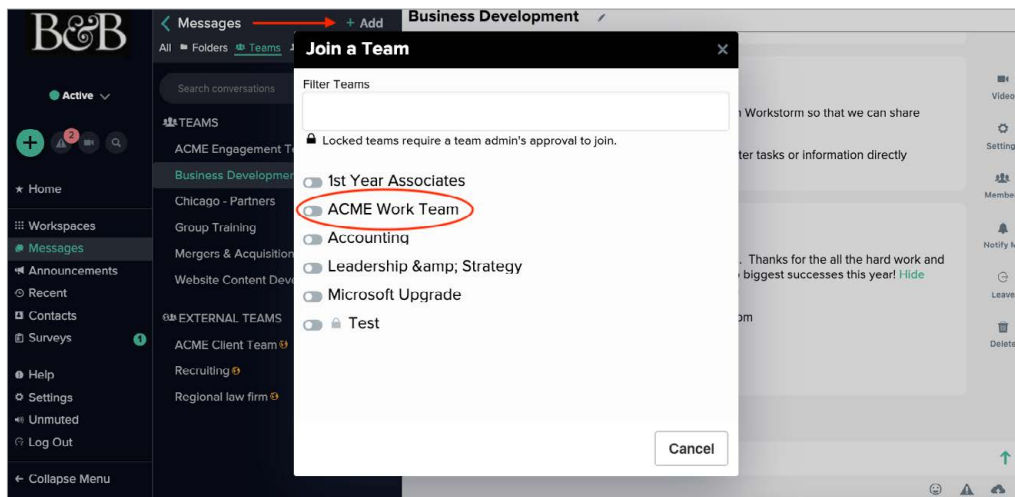
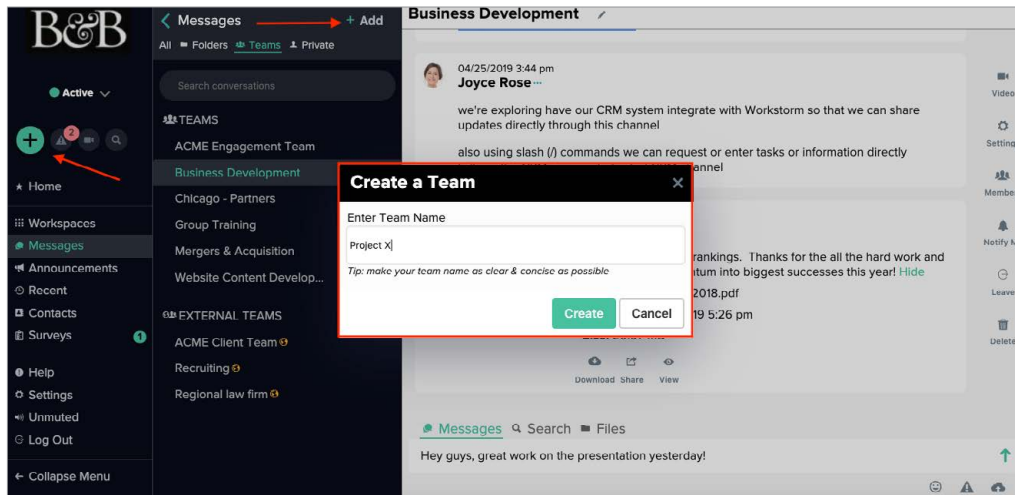
Embed GIPHYs in your conversations. Type "/" and select the GIPHY pop-up above the message box. Then type the word you wish to convey in an animated image and press **Enter**.



TEAM MESSAGES


[Send and receive messages among multiple members](#) by adding teams, using the green plus icon  in the left menu and selecting [Team](#) to create a new team conversation. You can also click on [Messages](#), Add then Team to create a new team or Join [Team](#) to see a list of existing teams that you can join.


Search for and join existing teams, or create a new team.



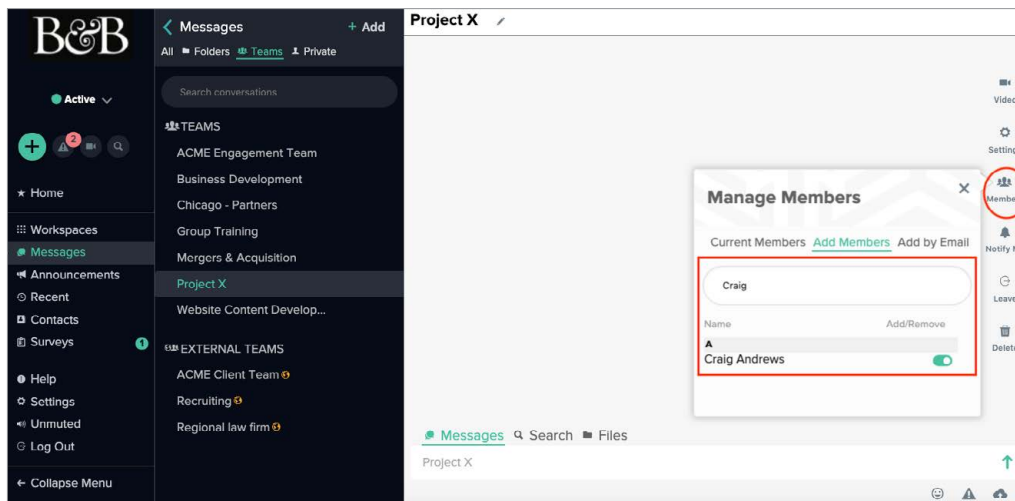
TEAM ADMIN/CREATOR

[Team Admins](#) can designate the team name, its availability in team search, and if membership is open or by approval only.

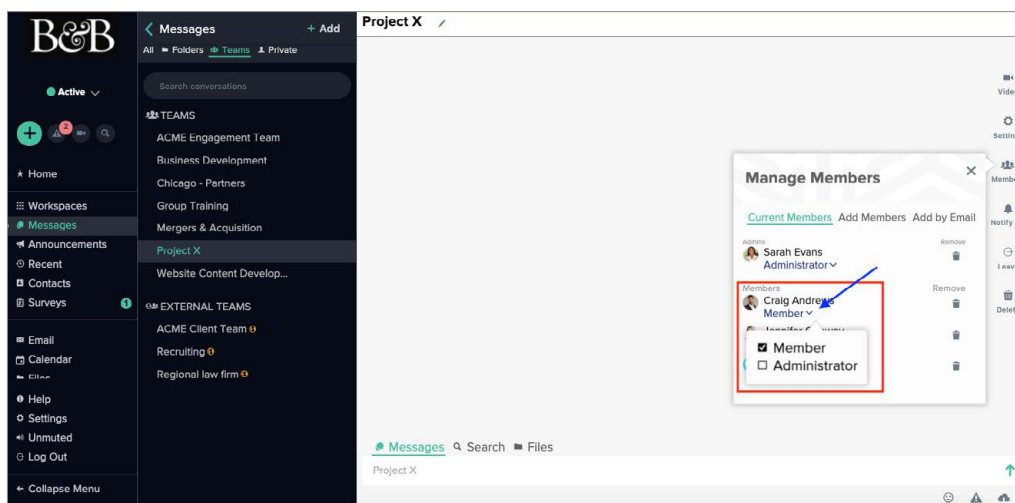
Edit the team name, whether it's a private or public team, by clicking on the  icon to the right of the Team name in the Team's expanded conversation.

Select  icon to manage Team privacy settings


Click the members icon to add or remove members using the search bar.

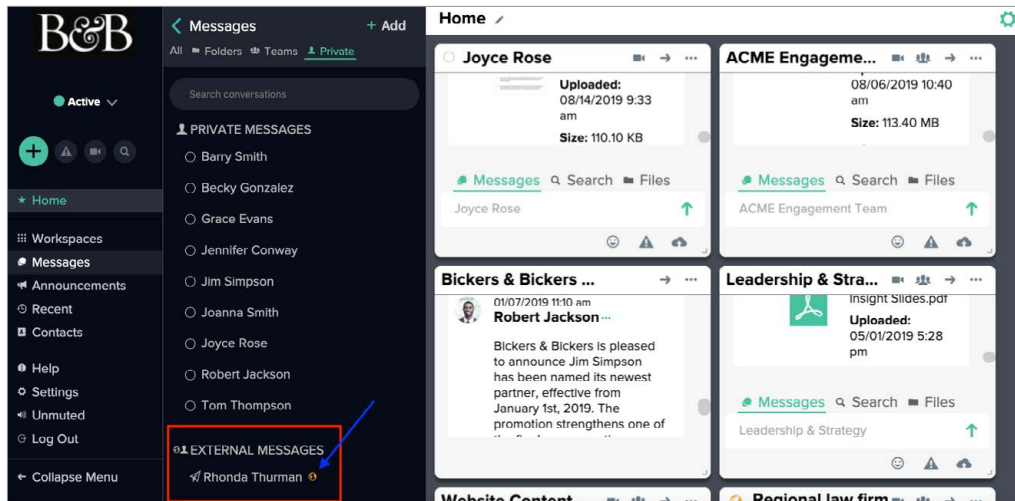


Appoint additional Team Admins using the dropdown.



EXTERNAL MEMBERS

Private or team conversations with members from outside your company are categorized as [External Messages](#) in the [Messages](#) menu and marked with the  icon.

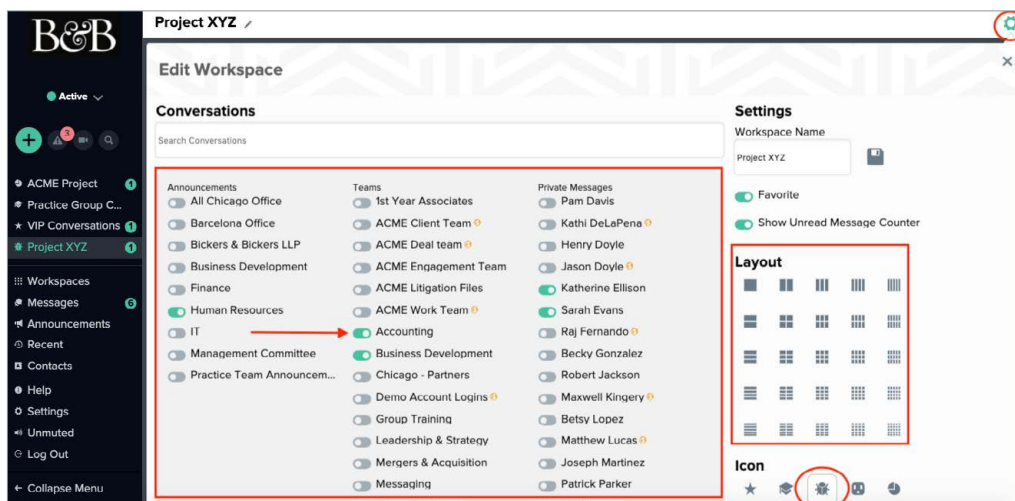
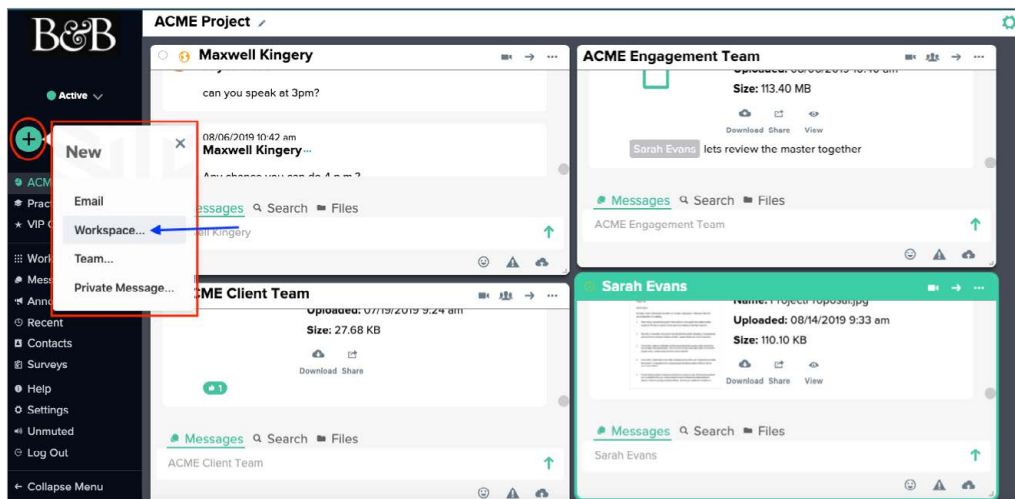


ADDITIONAL FEATURES

Access company-wide announcements, conduct surveys, check messages on the go and more, using these additional Workstorm features.

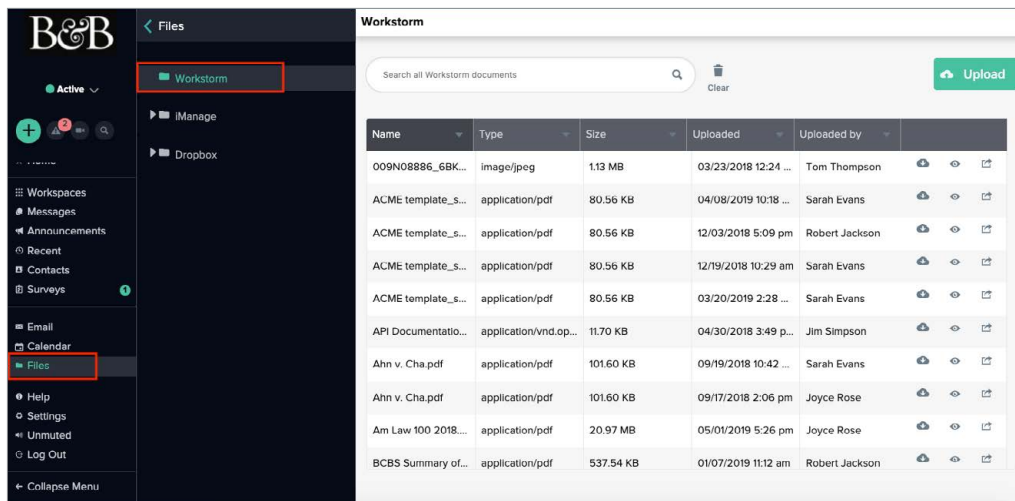
WORKSPACES

Organize related teams and private conversations into [Workspaces](#) by selecting the green plus icon and then [Workspace](#) to create a new Workspace. Edit existing Workspaces, add new conversations and update its layout by selecting the green gear icon at the top right of the screen.



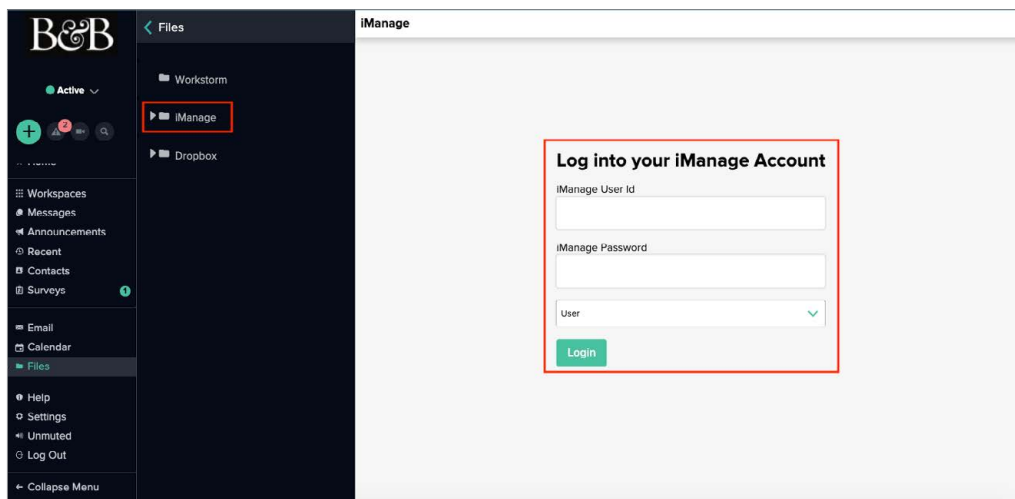
FILE MANAGEMENT

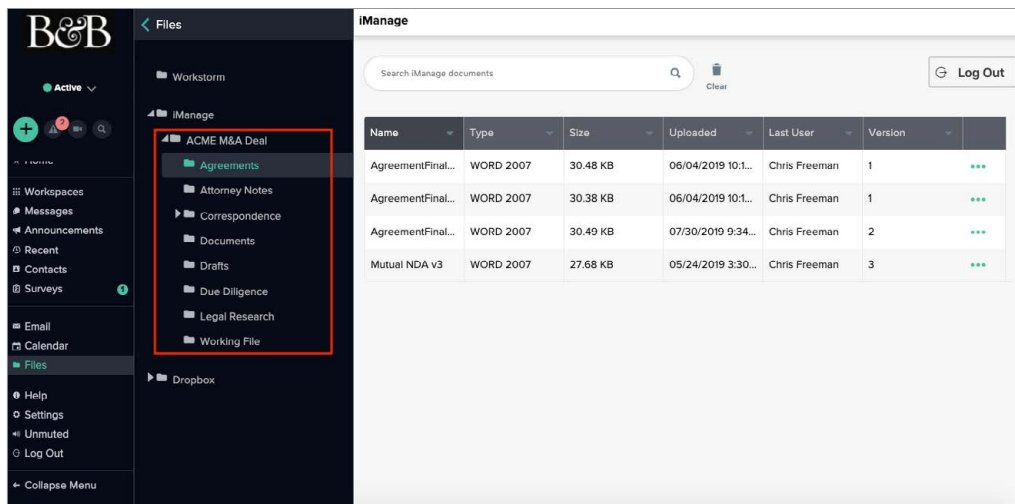
All files uploaded by or shared with you can be found in your Workstorm File Repository in the left menu. You may also upload, share, view and search for files here.



Access integrated document management systems (DMS), such as iManage by clicking on **Files** in the left menu. The DMS folder will appear under the Workstorm file folder.

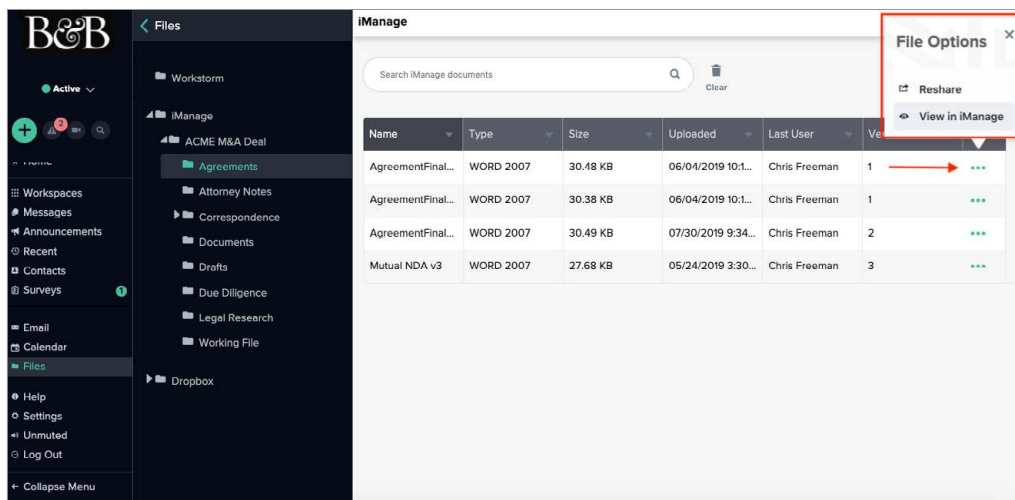
Click on the DMS folder, and enter your credentials to login to your DMS account.





Reshare a DMS file by selecting the blue ellipsis to the right of the file info and then re-share to a private or team conversation.

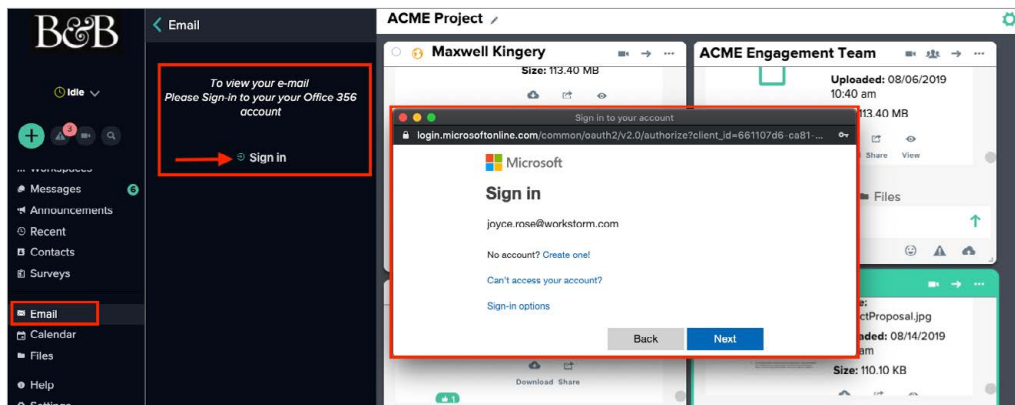
Click the three dots next to the file and then [View](#) to open a new tab inside the DMS system to edit or update the file and maintain version control.



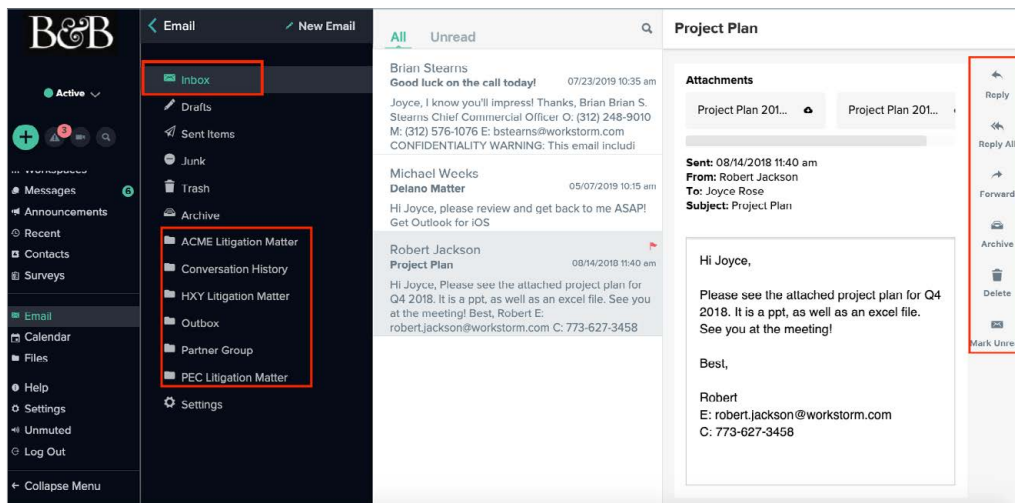
EMAIL/CALENDAR INTEGRATION

Select **Email** in the left menu. Then, click the **Sign in** button to enter your credentials and log into your email account.

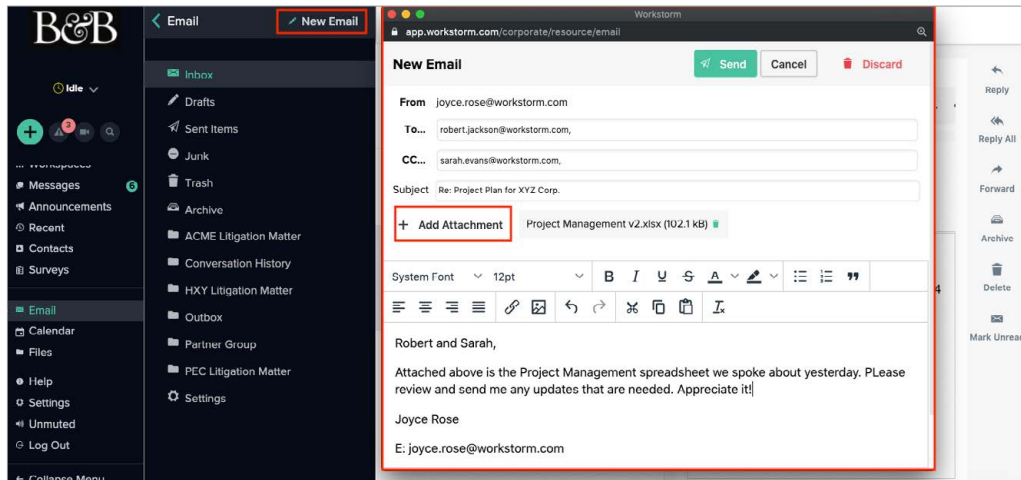
NOTE: If you do not see Email in the left menu, contact your site administrator to enable the Email integration feature.



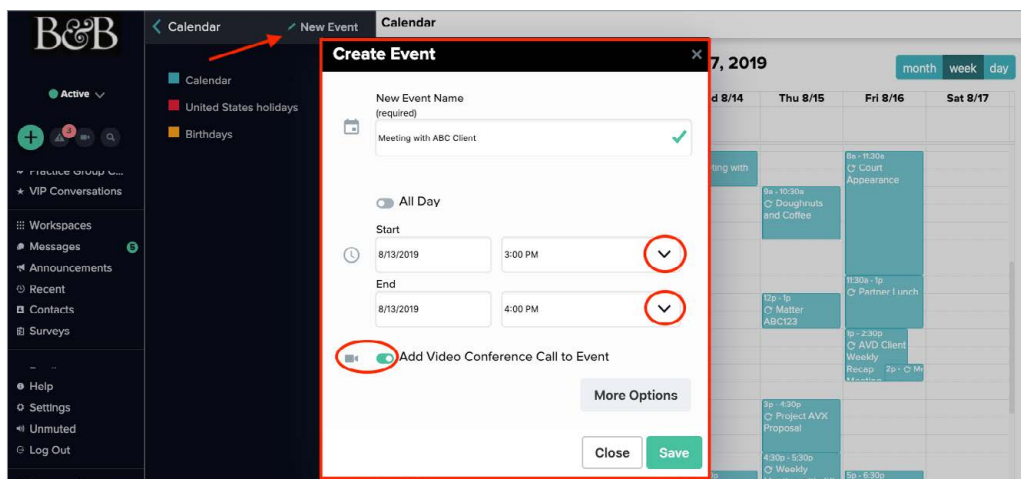
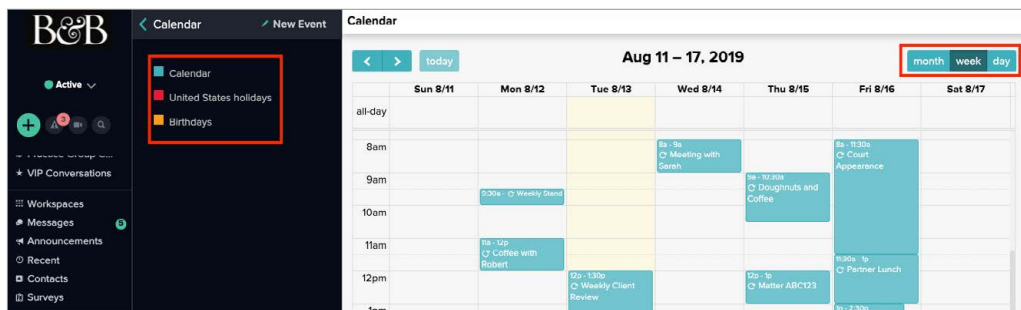
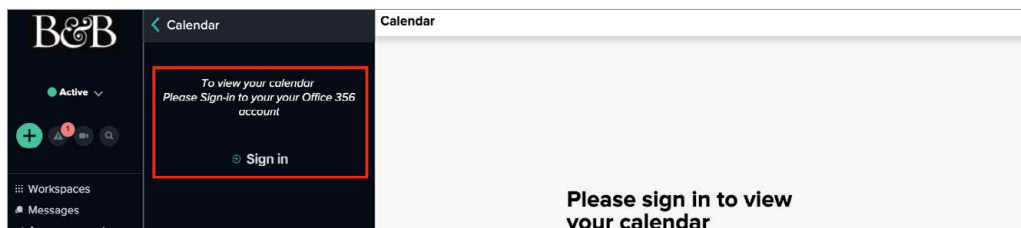
Access your inbox, folders, and settings. Reply, forward, archive, delete, or mark the email as unread from the sidebar on the right.



Compose a new email by clicking [New Email](#) in the menu. Add attachments, format content and more.



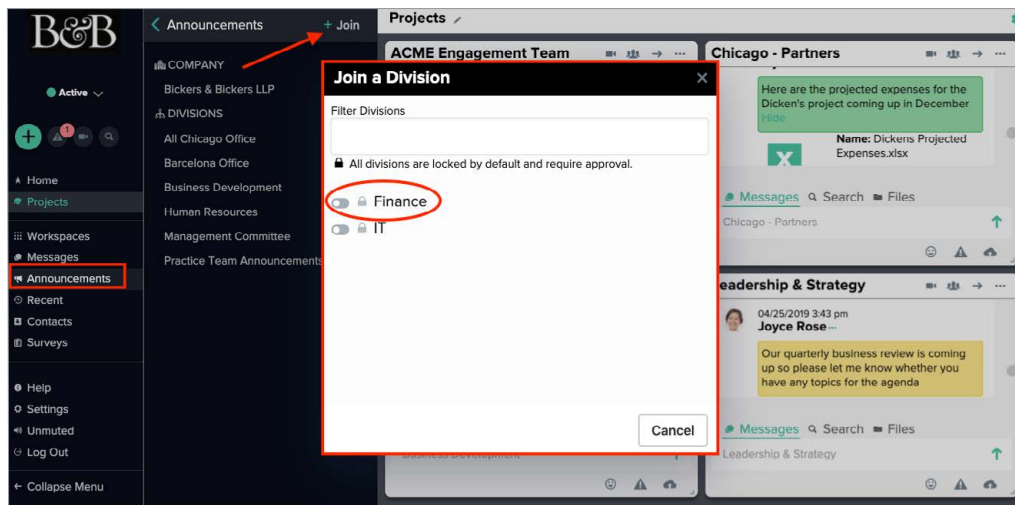
After signing into Email, you will also have access to an integrated [Calendar](#). Click on Calendar in the left menu to view it, create and schedule new events and edit existing events.



ANNOUNCEMENTS

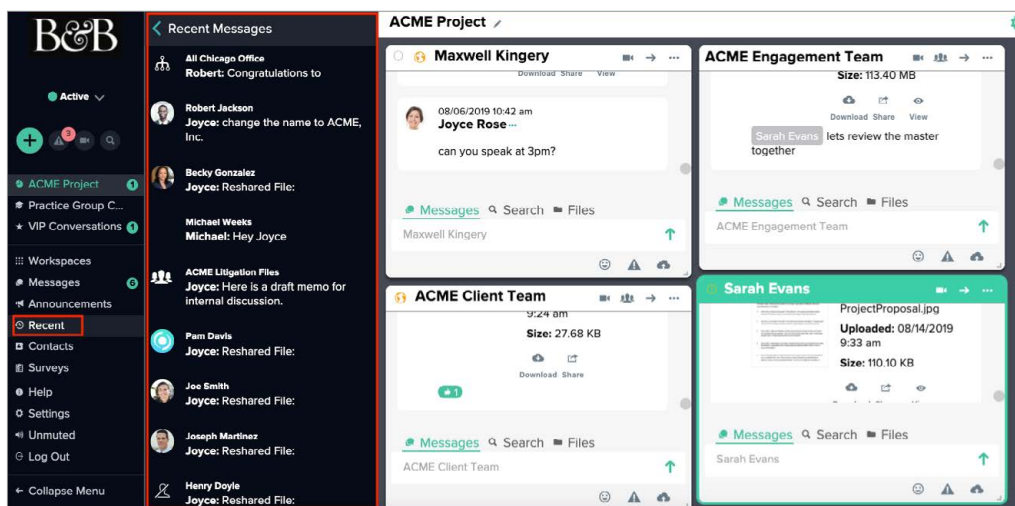
Access company-wide and Division announcements by selecting [Announcements](#) in the left menu. Click on the Join button at the top right of the sub menu to view Divisions that you can join.

NOTE: Divisions mirror company departments, offices, geographies, etc. as determined by the Site Admin.



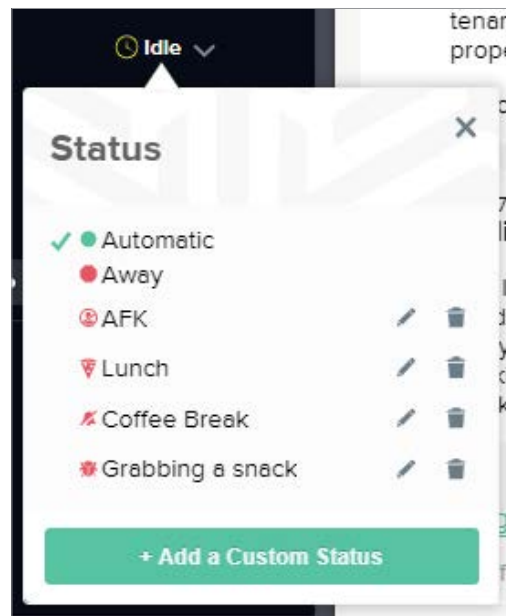
RECENT

[View recent activity](#) and notifications by selecting [Recent](#) in the left menu. Click to open a recent activity.



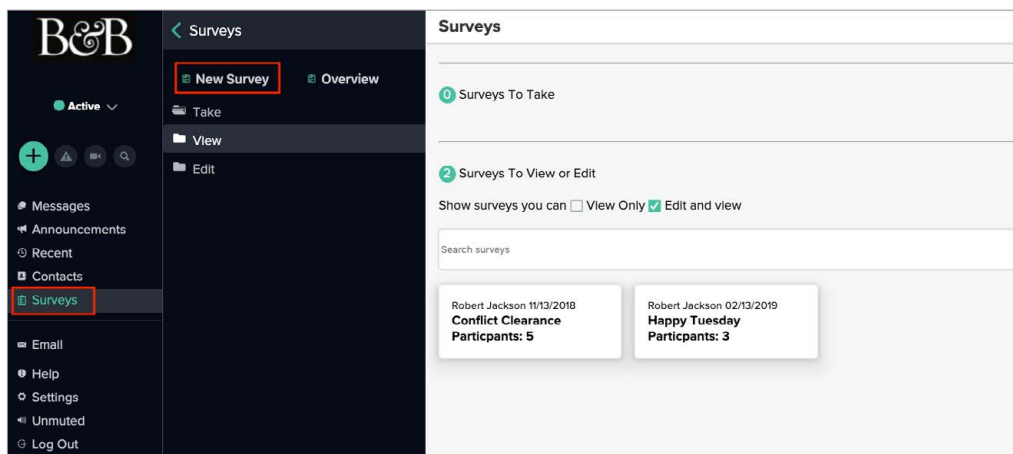
CUSTOM STATUS

Keep your colleagues updated on your status and add custom statuses, like out to lunch or in a meeting, by clicking on the dropdown next to your status indicator near the top of the left menu.





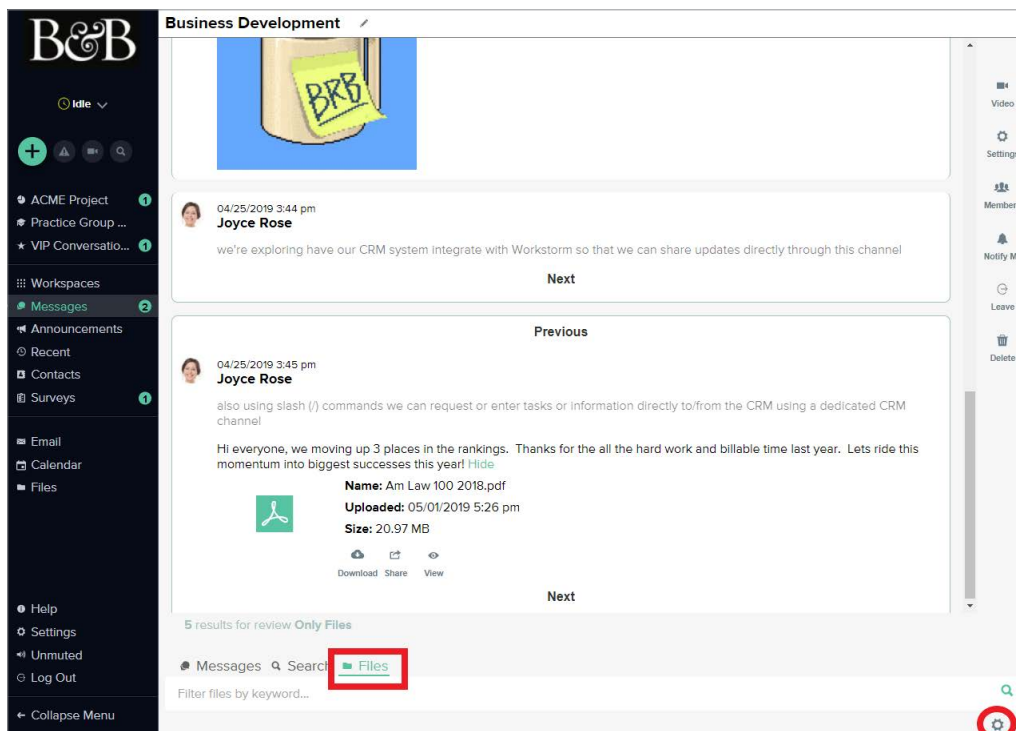
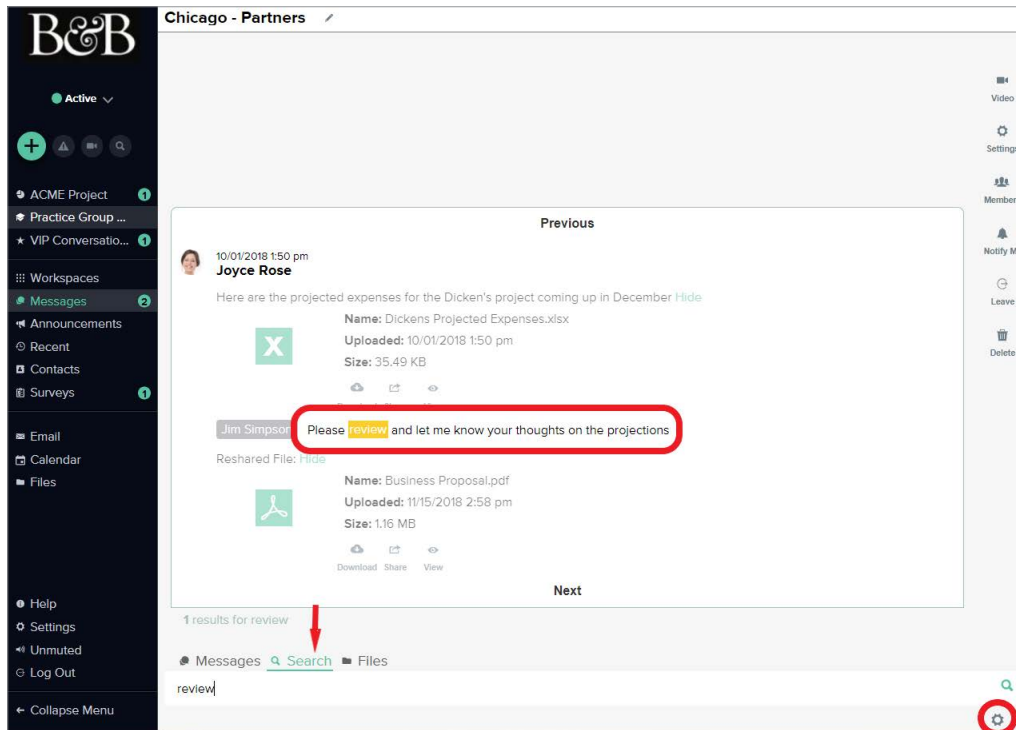
SURVEYS


Select [Surveys](#) in the left menu to host or participate in an anonymous survey and/or view results.

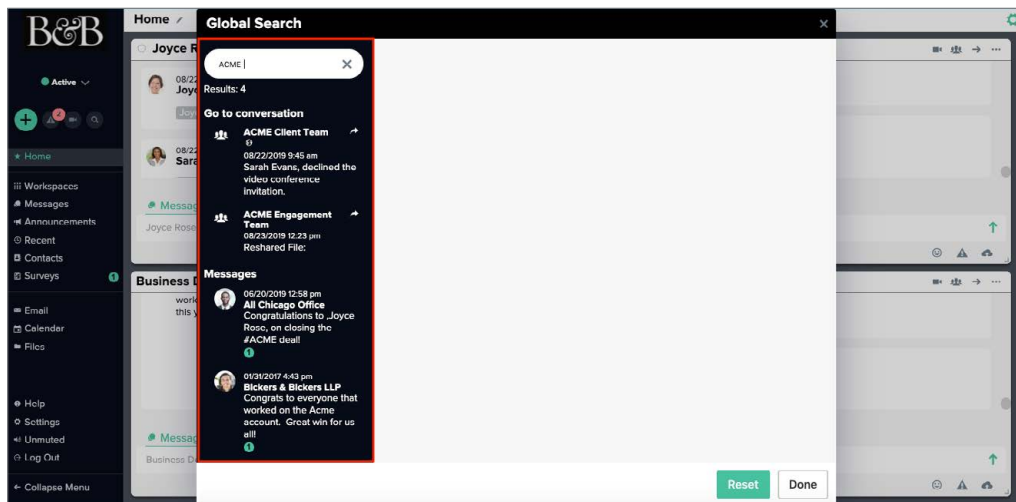


SEARCH

[Search for keywords](#) within a conversation by clicking  [Search](#) above the message box. Refine search by selecting the  icon on the right side of the search box for more advanced options or the Files tab to see all of the files shared in the conversation.

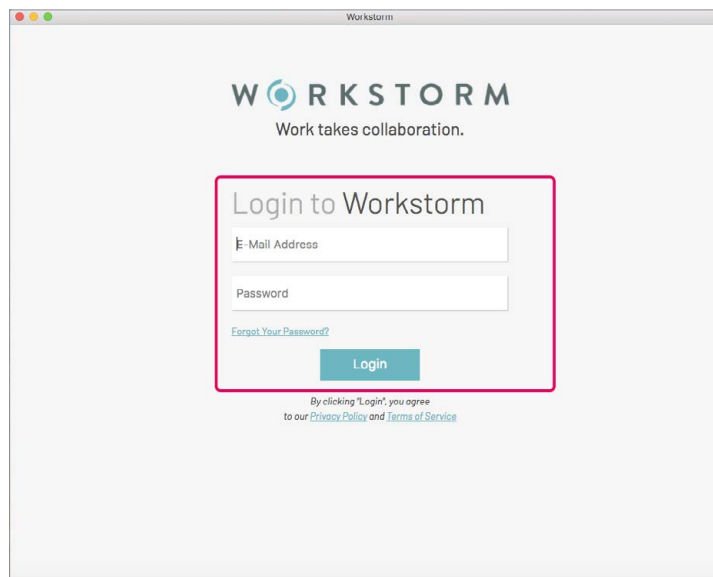


Conduct a global search for keywords across all conversations by clicking  near the top of your left menu.



DESKTOP APP

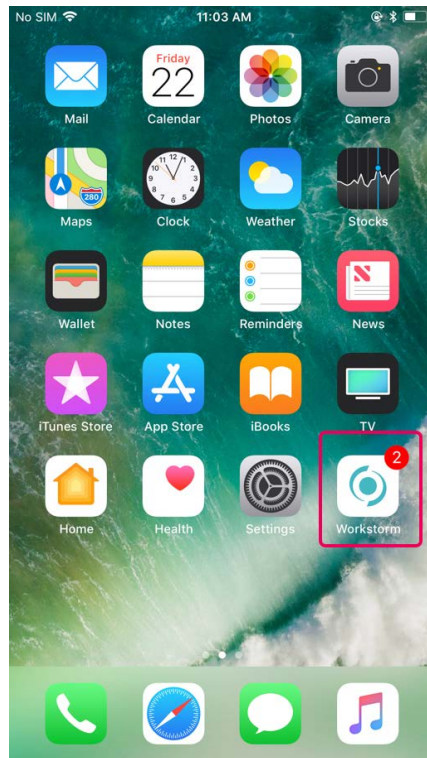
Access Workstorm via the [desktop app](#) for Mac and Windows. App users neither require a compatible browser to access Workstorm, nor the Workstorm Screen Share plugin for video calls.



MOBILE APP

Send and receive messages on the go by downloading the mobile app for [Apple](#) or [Android](#).

Login with your credentials to access your secure account.



Open [Settings](#) on your phone, select [Notifications](#), and scroll to find and click on the Workstorn app. Toggle to [Allow Notifications](#), [Sounds](#) and other [Alerts](#) settings.

