

User Guide

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Serious collaboration for serious business.

Additional video tutorials and web articles can be found at helpdesk.workstorm.com

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.

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- Workspaces
- File management
- Email/Calendar Integration
- Announcements
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- Workstorm Bot
- Desktop and Mobile app

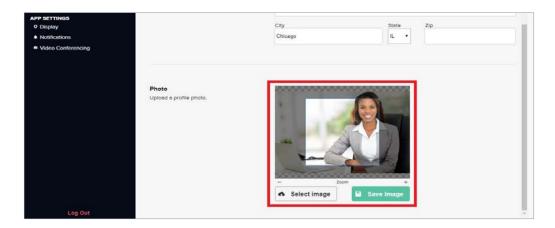
ACCOUNT SETUP

<u>Sign up for Workstorm</u> via the email invite from <u>support@workstorm.com</u>, 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 at the bottom of the left side bar, then *Profile* to customize your profile. Click on *Display* to adjust font size and to pick a color theme based on your preferences.

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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.*

Account Settings	Notifications Control notifications that you receive for new ennouncements or messages.	×
Search Settings		
	Email Notifications Set your preferences for receiving email reminders about missed messages, alerts and video call invitations waiting for your response.	ľ
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	Sennifer Conway	
	Jim Simpson	
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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	Security Manage the security settings for your acco	unt	×
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Socurity Accounts	M Update Password	New Password	
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Video Conferencing		Include at least one number, uppercase letter or symbol (0#\$%/). 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.

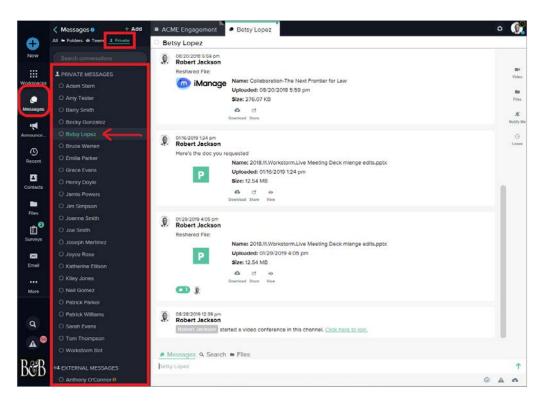
Account Settings Search Settings	Security Menege the security settings for your eccor	unt
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	Two Factor Authentication Add on extro loyer of security.	TOTP Authentication TOTP euthentication Phone SMS authentication Phone SMS authentication is disabled SMS Phone Number Phone Number

MESSAGING

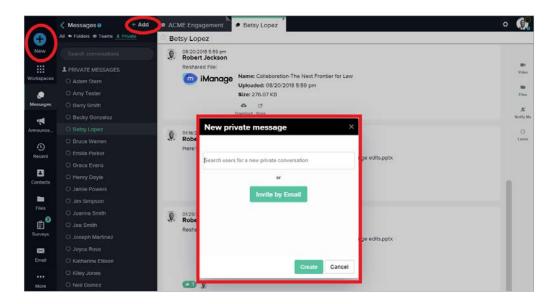
Use Messaging to send private or team messages, share files, host video calls, and more, all within the same secure platform.

PRIVATE MESSAGES

Select Messages, and then Private in the left menu to see all your existing conversations.

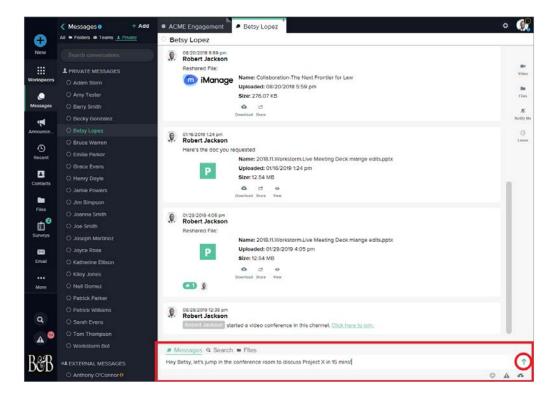


To <u>start a new one-on-one private conversation</u>, you can either select the blue plus + icon on your left menu, then *Private Message* or select *Messages*, then the *Add* button and *Private*.



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 by Email 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.

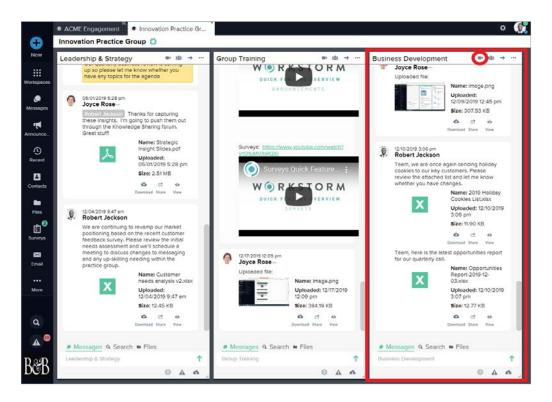


VIDEO CONFERENCING

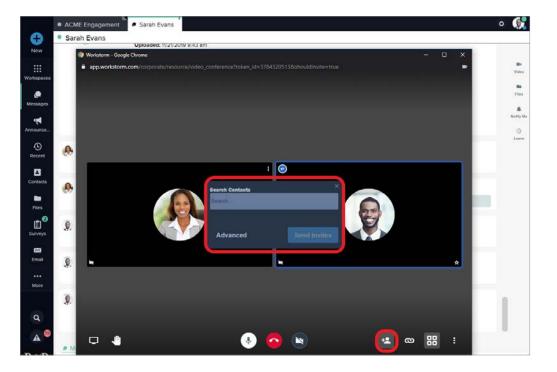
Start a video call or share your screen by selecting the **selecting** icon on the right toolbar within a private or team

conversation or Workspace.

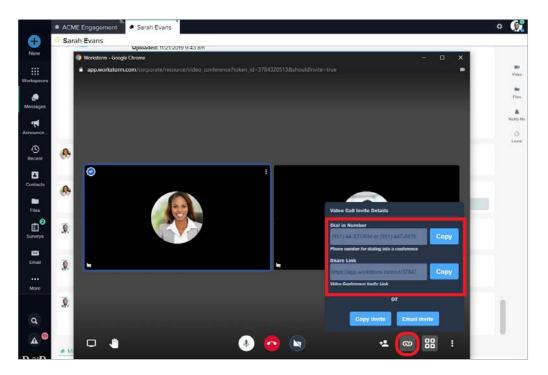
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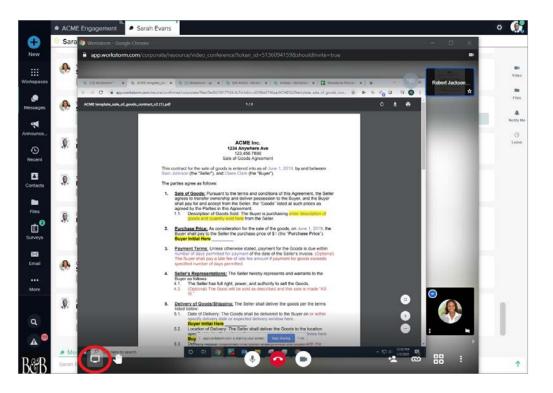
Invite additional participants by clicking the invite icon at the bottom right of video call window. Search for members and select their names to invite them to the call.



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.



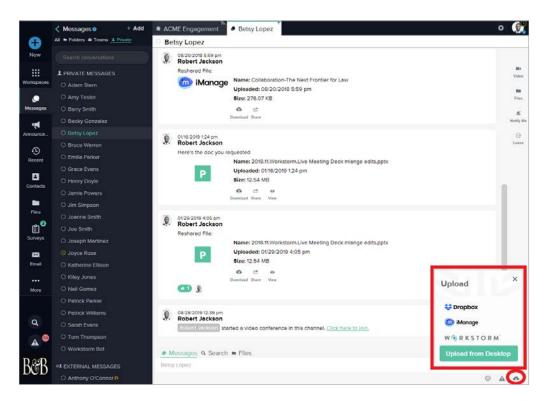
If you would like to share your screen, click the monitor icon on the bottom left of the video call window. Up to 12 people can share their screen at a time.



FILE SHARING

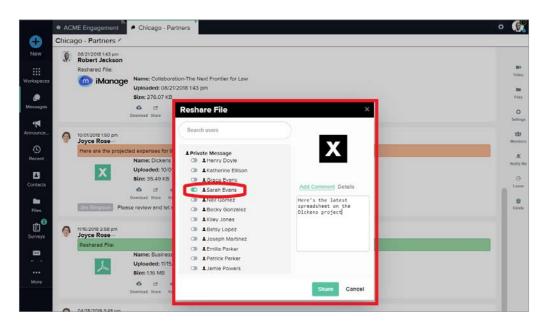
Share files within a private or team conversation by selecting the 🧥 icon to open the File Uploader, or drag and drop a file

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.





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.

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Announce		2019 Holiday Cooki	application/vnd.ope	11.90 KB	Robert Jackson	12/10/2019 3:06 pm	Business Developm
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		Customer needs an	application/vnd.ope	12.45 KB	Robert Jackson	12/04/2019 9:47 am	Leadership & Strategy
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Files		BGA Strategy Draft	application/vnd.ope	138.47 KB	Robert Jackson	11/20/2019 5:20 pm	BGA Litigation Strat
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		RFP Reponse.docx	application/vnd.ope	652.47 KB	Robert Jackson	11/20/2019 1:51 pm	BGA Litigation RFP

ALERTS

<u>Alerts</u> <u>A</u> appear in the left menu when you:

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

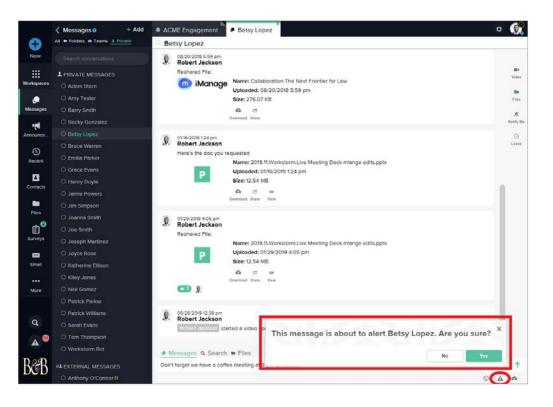
Click on the Alert icon A near the bottom of the left side bar to access your Alerts menu. You can click *Go To* to see alerts within the conversation they originated from or select *Acknowledge* or *Acknowledge All* to dismiss unread alerts.

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Acknowledge All	
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+ James Chapman added to ACME Full Client Team by team admin Joyce Rose	
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Joyce Rose has modified company settings	
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URGENT MESSAGES

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

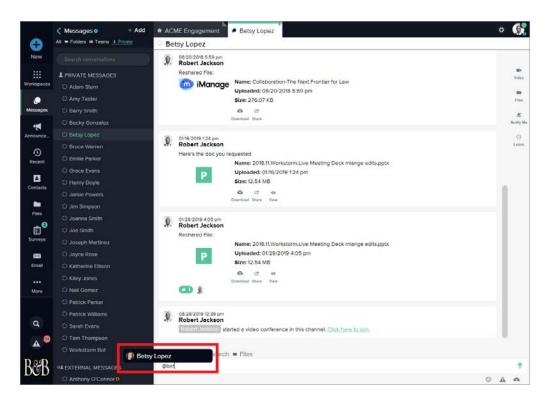
Send urgent messages by clicking the 🛕 icon in the message box, instead of pressing *Enter* on your keyboard.



MENTIONS

<u>Use @mentions</u> 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 m that will appear at the top right of the message on a mouse hover. Here's an example of what it looks like when a user reacts to a message.

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Contects	9	04/30/2019 12.43 pm Kiley Jones He usually does \$1,200 for 10 hours.	
Files C Surveys		But with gear, it's an extra \$800	
Emol	9.	04/30/2018 tr7 pm Robert Jackson Im fine with that rate. Let's make sure we have the proper insurance.	

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

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v .		Joyce Rose				
		Hi everyone, we movi year!	ing up 3 places in the rankings. Thanks for the all the hard work an	d billable time last year. Lets ride this momentum into biggest successes this		
		year:	Name: Am Law 100 2018.pdf			
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		2	Uploaded: 05/01/2019 5:26 pm			
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2		12/10/2019 3:06 pm Robert Jackson		· • • • •		

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.

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oces 👰	09/23/2019 12:33 pm Robert Jackson sorry, there wasn't a n	tification sound		Video Files
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0	10202019 10:28 am Joyce Rose Joyce Rose Invited y	bu to a video conference. Click here to join.		
аль ні е	X	Name: 2019 Holiday Cookies Listuksx Upfoeded: 12/09/2019 12:44 pm Size: 11.01 KB Go dt e emitted State: Yee	Emoji ® 🌳 😀	×
•	Joyce Rose			• • •
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YOUTUBE

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

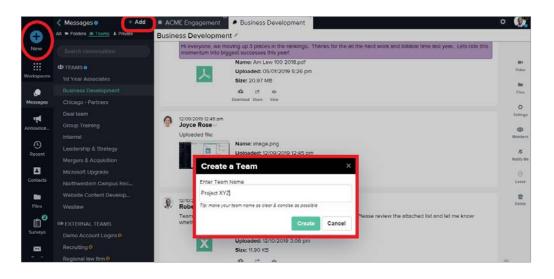
GIPHYs

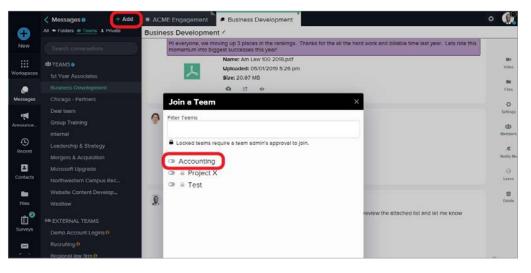
Embed GIPHYs in your conversations. Type "/" and select the GIPHY pop-up above the message box. Then type the word you wish to convey in an animated image and press *Enter*.

TEAM MESSAGES

Send and receive messages among multiple members by adding teams using the blue plus icon \bigoplus at the top of the left side bar and select *Team* to create a new team conversation. You can also click on *Message*, *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.





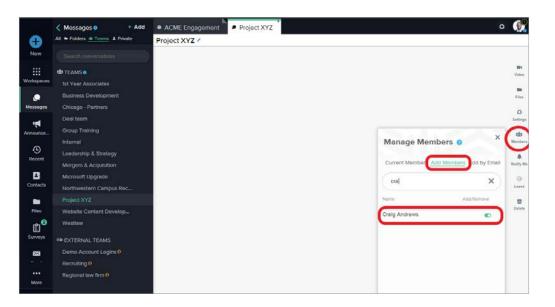
TEAM ADMIN/CREATOR

<u>Team Admins</u> can designate the team name, its availability in team search, and if membership is open or by approval only.

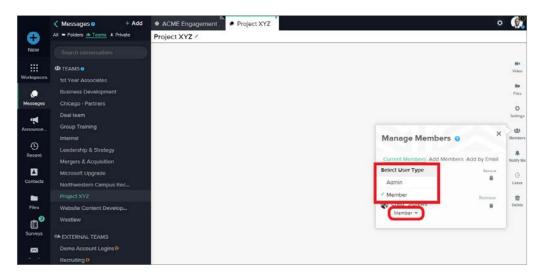
Edit the team name, whether it's a private or public team, by clicking on the 💉 icon to the right of the Team name in the Team's expanded conversation.

Select Ŏ icon to manage Team privacy settings

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

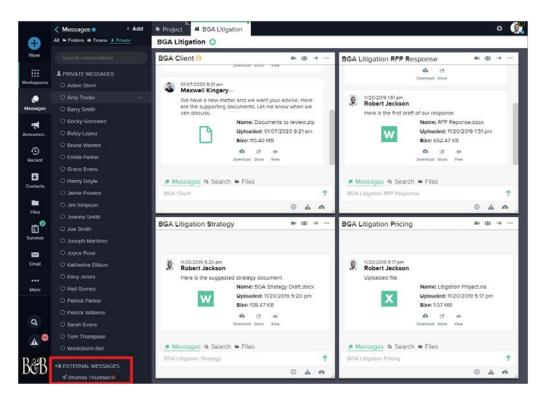


Appoint additional Team Admins using the dropdown.



EXTERNAL MEMBERS

Private or team conversations with members from outside your company are categorized as <u>External Messages</u> in the <u>Messages</u> menu and marked with the <u>S</u> icon.

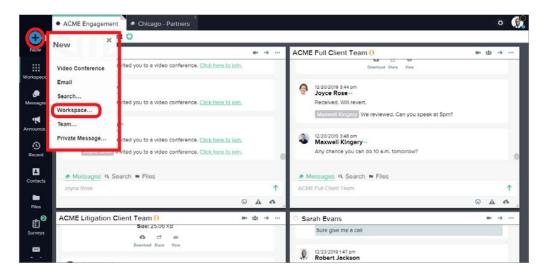


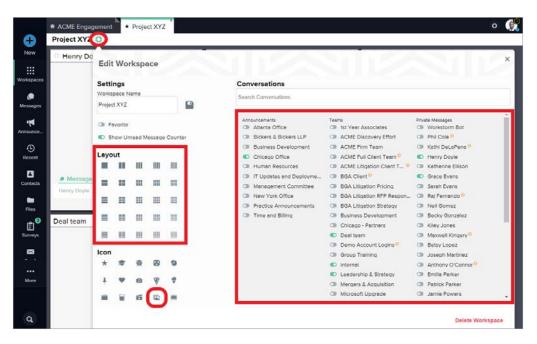
ADDITIONAL FEATURES

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 <u>Workspaces</u> by selecting the blue 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 to the right of the Workspace's name near the top left of the window.





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.

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		Opportunities Repor	application/vnd.ope	12.77 KB	Robert Jackson	12/10/2019 3:07 pm	Business Developm
		2019 Holiday Cooki	application/vnd.opa	11.90 KB	Robert Jackson	12/10/2019 3:06 pm	Business Developm
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		Customer needs an	application/vnd.ope	12.45 KB	Robert Jackson	12/04/2019 9:47 am	Leadership & Strateg
		2019 Holiday Cooki	application/vnd.ope	11.01 KB	Robert Jøckson	12/04/2019 9:45 am	Jayce Rose
		BGA Strategy Draft	application/vnd.ope	138.47 KB	Robert Jackson	11/20/2019 5:20 pm	BGA Litigation Strat
2		Litigation Project.xls	application/vnd.ms	1.07 MB	Robert Jackson	11/20/2019 5:17 pm	BGA Litigation Pricing
		Litigation Project.xls	application/vnd.ms	1.07 MB	Robert Jackson	1/20/2019 1:57 pm	(none)
		RFP Reponse.docx	application/vnd.ope	652.47 KB	Robert Jackson	11/20/2019 1:51 pm	BGA Litigation RFP

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.

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Announce	Dropbox	AgreementFinal_A	WORD 2007	30.48 KB		06/04/2019 10:14 a	Chris Freeman	1	
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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.

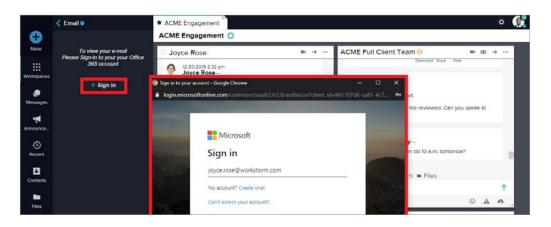
Click the three dots next to the file and then *View* to open a new tab inside the DMS system to edit or update the file and maintain version control or select download to save it to your desktop.

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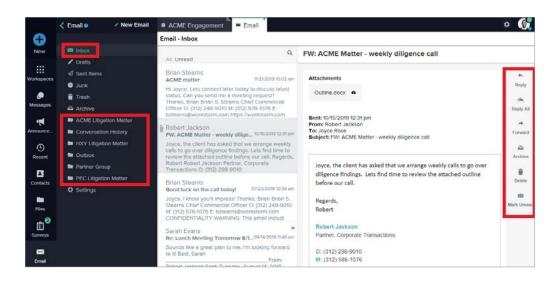
EMAIL/CALENDAR INTEGRATION

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

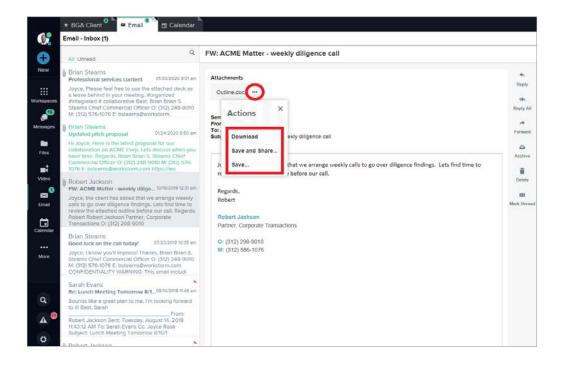
NOTE: If you do not see Email in the left menu, contact your site administrator to enable the Email integration feature.



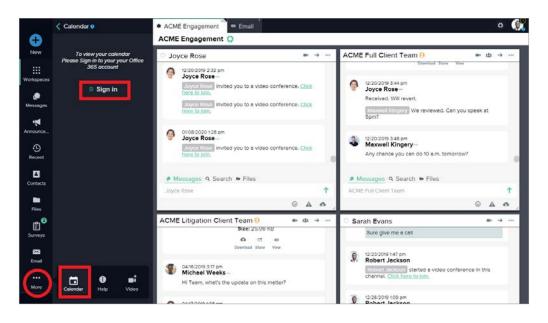
Access your inbox, folders, and settings. Reply, forward, archive, delete, or mark the email as unread from the sidebar on the right.



If you receive an email with an attachment, you can click the ellipsis to right of the attachment's name to bring up an action menu. Within this action menu, you can choose to download the attachment to your desktop by clicking *Download*, save it to your Workstorm file repository by clicking *Save* or save it to your file repository and re-share it with a colleague or team conversation by clicking *Save and Share*.



After signing into Email, you will also have access to an integrated *Calendar*. Click on *Calendar* in the left side bar or *More* menu to view it, create and schedule new events and edit existing events.



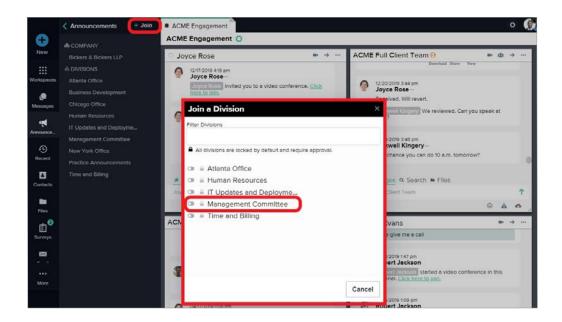
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ANNOUNCEMENTS

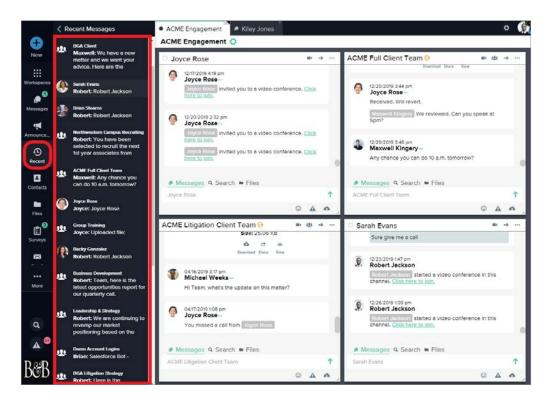
Access company-wide and Division announcements by selecting <u>Announcements</u> in the left menu. Click on the *Join* button at the top right of the sub menu to view Divisions that you can join.

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



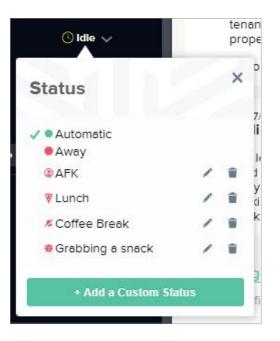
RECENT

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.



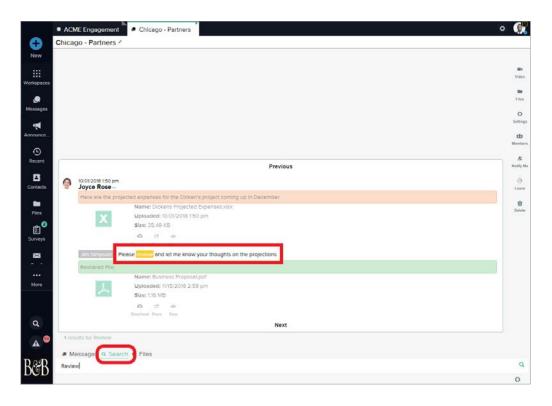
SURVEYS

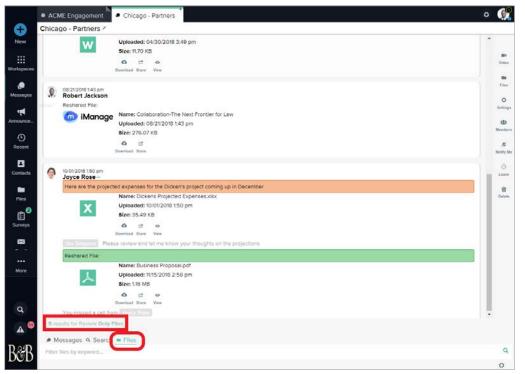
Select <u>Surveys</u> in the left menu to host or participate in an anonymous survey and/or view results.

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SEARCH

Search for keywords within a conversation by clicking *Q* 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 Q near the bottom of your left side bar.

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	tt ACME Firm Team ▲ INNCOV dio pm Serrer Evens, ere you free to discus ACME?	
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. 01/21 Rob	12/20/2019 348 pm Any chance you can do 10 a.m. fomorrow?	ipel-discovery- ionses- duction.docx
Rest	北 ACME Litigation Client * Team	oaded: 28/2018 9:21 am
	6 04/7/2019 108 pm You missed a call from "Joyce Rose	et 25.06 KB Et ex- ad Share View
	Messages	
a	1/1/2/19 4-06 pm ACME Firm Team Sarah Evans, are you free to discus ACME?	on
	06/20/2019 12:58 pm Chicago Office	
9. 08/2 Rob	Congratulations to "Joyce	ndstory fire drill

DESKTOP APP

Access Workstorm via the <u>desktop app</u> for Mac and Windows. App users neither require a compatible browser to access Workstorm, nor the Workstorm Screen Share plugin for video calls.

 Workstorm	
W () R K S T O R M Work takes collaboration.	
Login to Workstorm	
E-Mail Address	
Password	
Forgot Your Paseword?	
By clicking 'Login', you agree to our <u>Privacy Policy</u> and <u>Terms of Service</u>	

MOBILE APP

Send and receive messages on the go by downloading the mobile app for <u>Apple</u> or <u>Android</u>.

Login with your credentials to access your secure account.



Open Settings on your phone, select Notifications, and scroll to find and click on the Workstorm app. Toggle to Allow Notifications, Sounds and other Alerts settings.

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