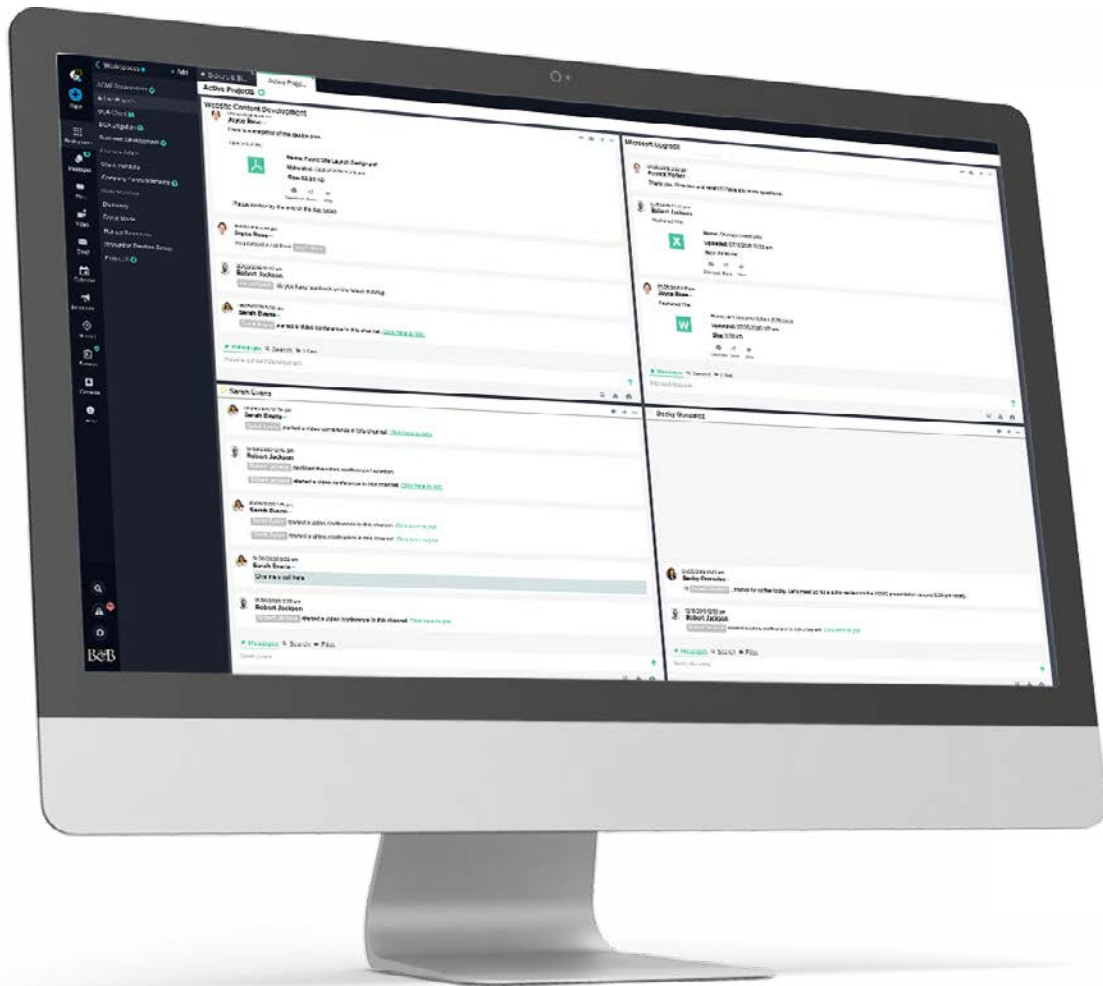


WORKSTORM™

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

06-19 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

20-30 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](#) 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.

Account Settings

Search Settings

PERSONAL SETTINGS

- Profile
- Security
- Accounts

APP SETTINGS

- Display
- Notifications
- Video Conferencing

Profile

Enter your contact details and upload a picture for your account.

Personal Information

Add or update your contact information.

[Save](#)

Email Address
sarah.evans354@gmail.com

First Name (required)
Sarah

Last Name (required)
Evans

Job Title
Associate

Work Phone
312-867-5309

Internal Extension
123

Cell Phone

Address
2400 N. Greenview Ave

Address Cont.

City
Chicago

State
IL

Zip

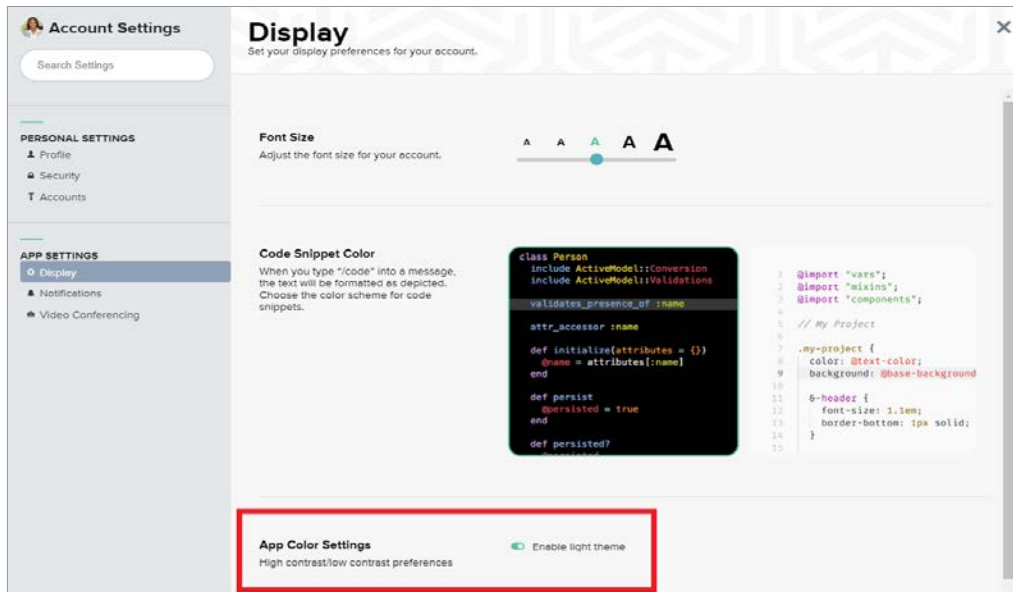
APP SETTINGS

- Display
- Notifications
- Video Conferencing

Photo

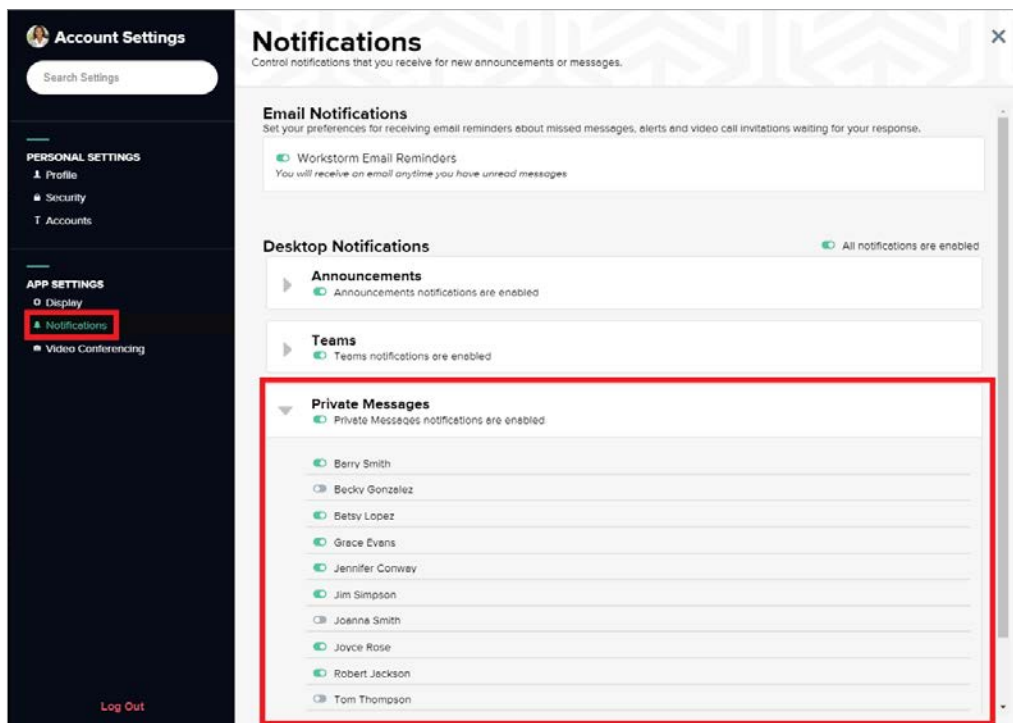
Upload a profile photo.

[Select image](#) [Save Image](#)



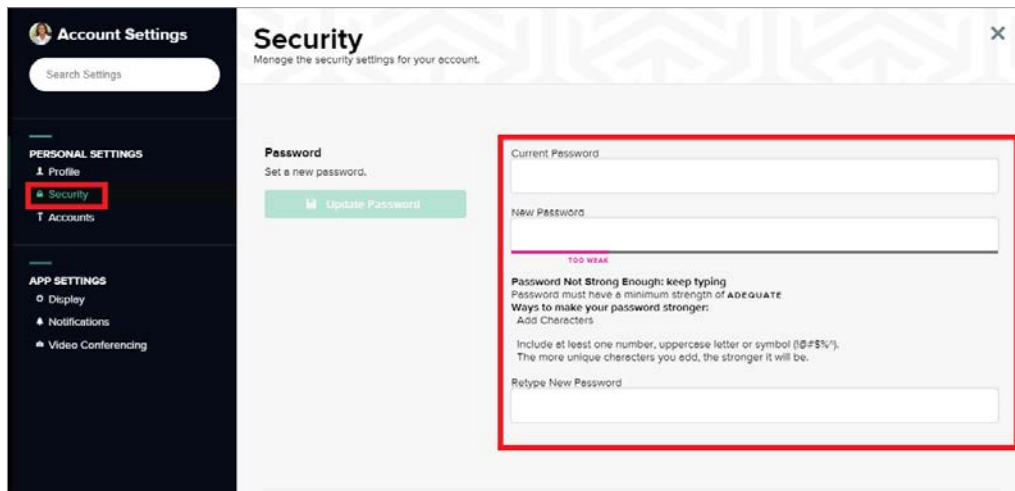
NOTIFICATIONS

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.

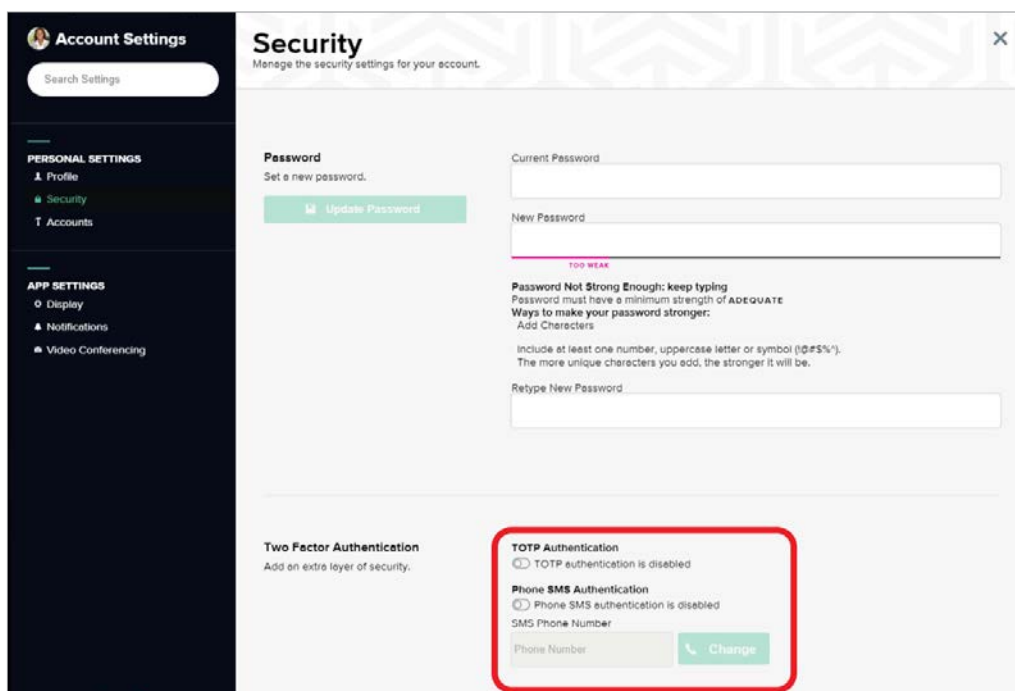


The screenshot shows the 'Security' settings page. On the left, the 'Account Settings' sidebar has 'Security' highlighted under 'PERSONAL SETTINGS'. The main content area is titled 'Security' and 'Manage the security settings for your account.' Below this, the 'Password' section is active, showing 'Set a new password.' and an 'Update Password' button. The password form includes fields for 'Current Password', 'New Password', and 'Retype New Password'. A red box highlights the 'New Password' field, which has a 'TOO WEAK' error message. Below the fields, a message states: '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.'

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.



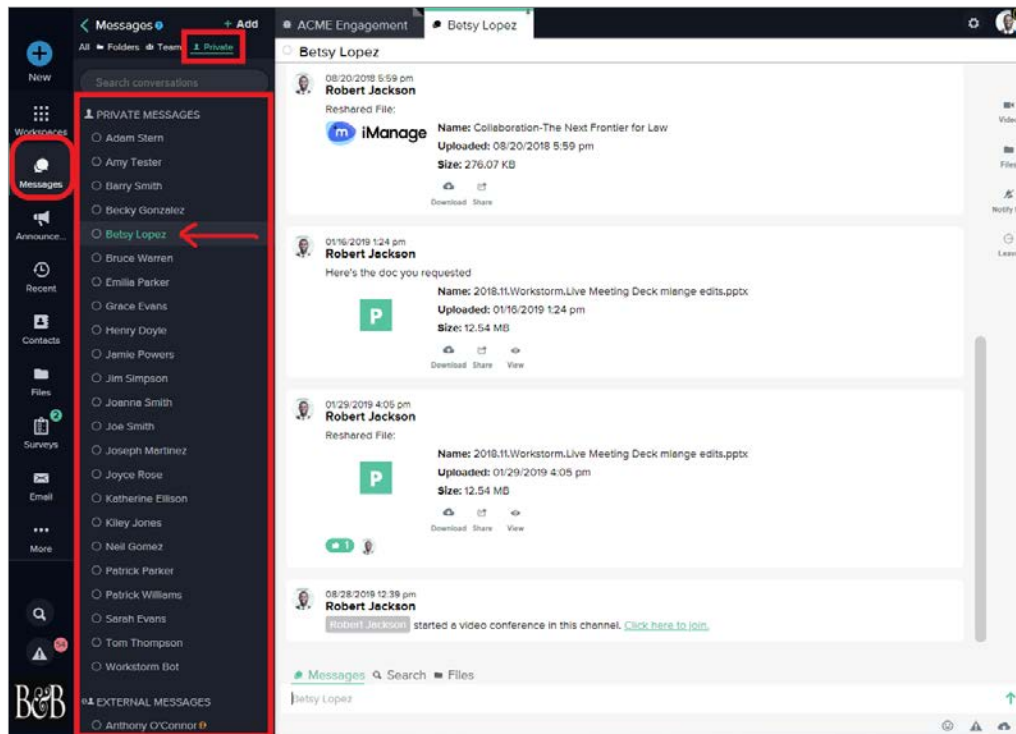
The screenshot shows the 'Security' settings page, specifically the 'Two Factor Authentication' section. The sidebar on the left shows 'Security' highlighted. The main content area is titled 'Security' and 'Manage the security settings for your account.' Below this, the 'Two Factor Authentication' section is active, showing 'Add an extra layer of security.' and a 'Change' button. The 2FA section includes two options: 'TOTP Authentication' (disabled) and 'Phone SMS Authentication' (disabled). A red box highlights the 'Phone SMS Authentication' section, which includes a 'SMS Phone Number' field and a 'Change' button.


MESSAGING

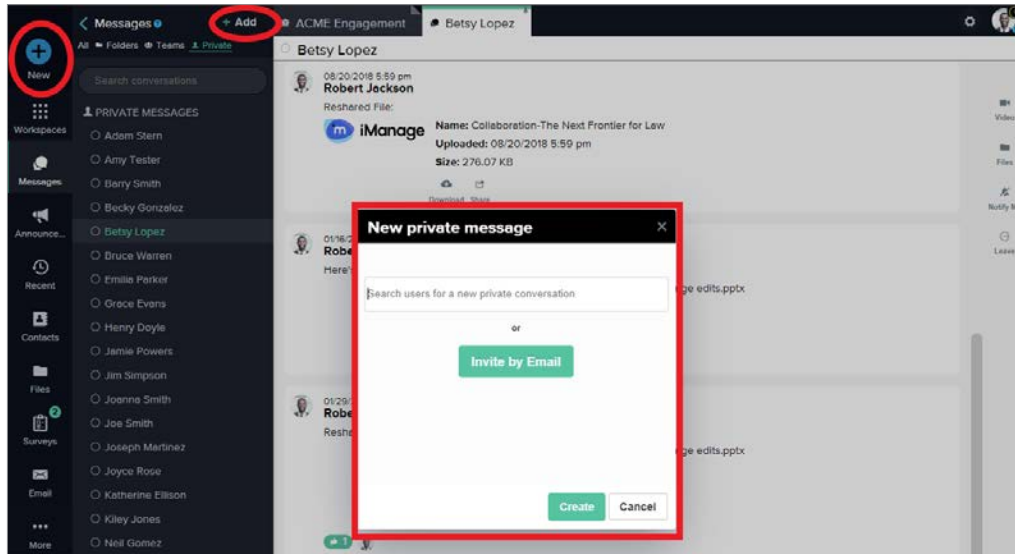
Use Messaging to send private or team messages, share files, host video calls, and more, all within the same secure platform.

PRIVATE MESSAGES

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

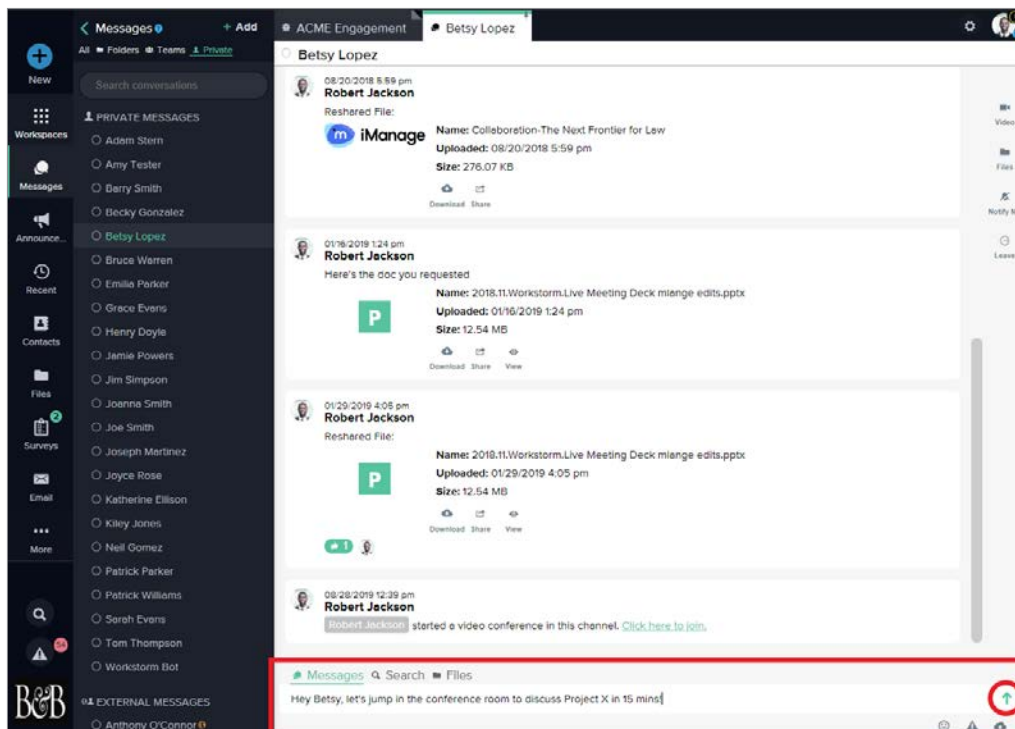


To [start a new one-on-one private conversation](#), you can either select the blue plus  icon on your left menu, then *Private Message* or select *Messages*, then the *Add* button and *Private*.




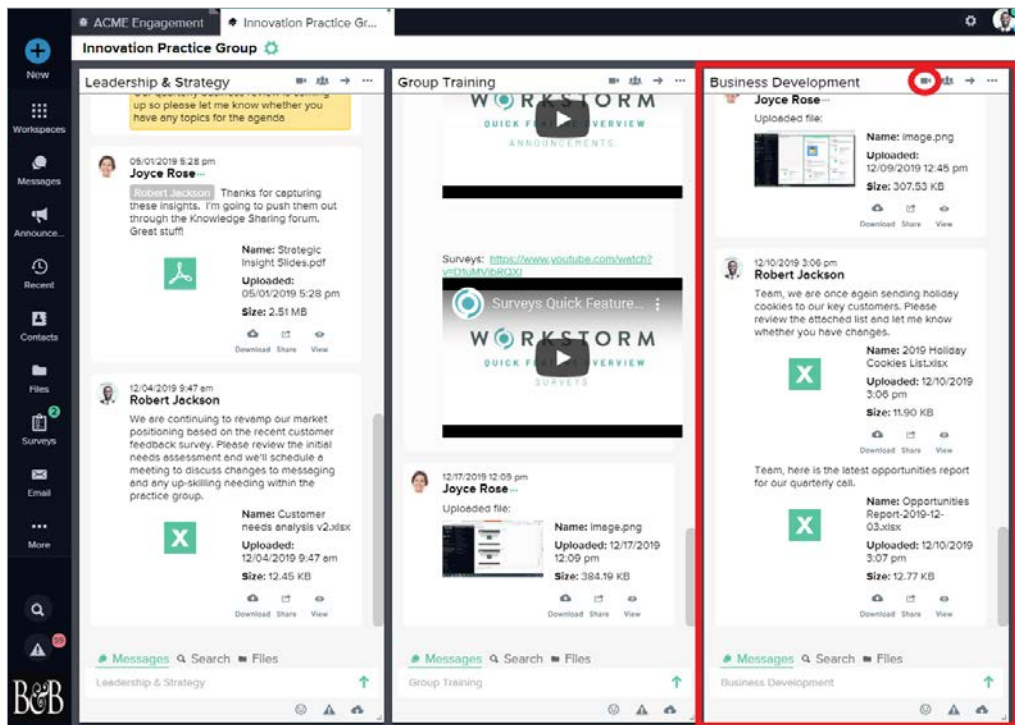
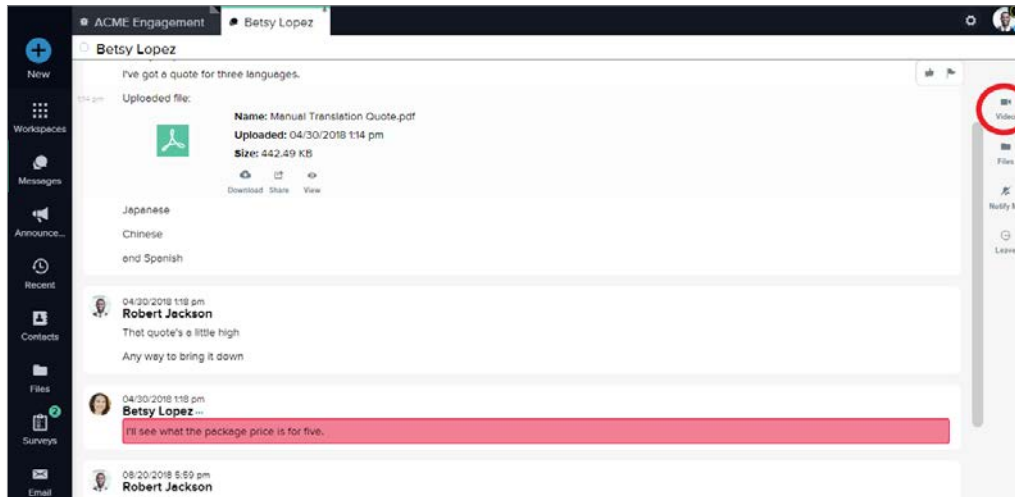
NOTE: For security purposes, only existing members of a company's account will appear in search. If you have permission to invite new or external members, an *Invite by Email* button will appear below the search bar. If not, contact your Site Admin for help.

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

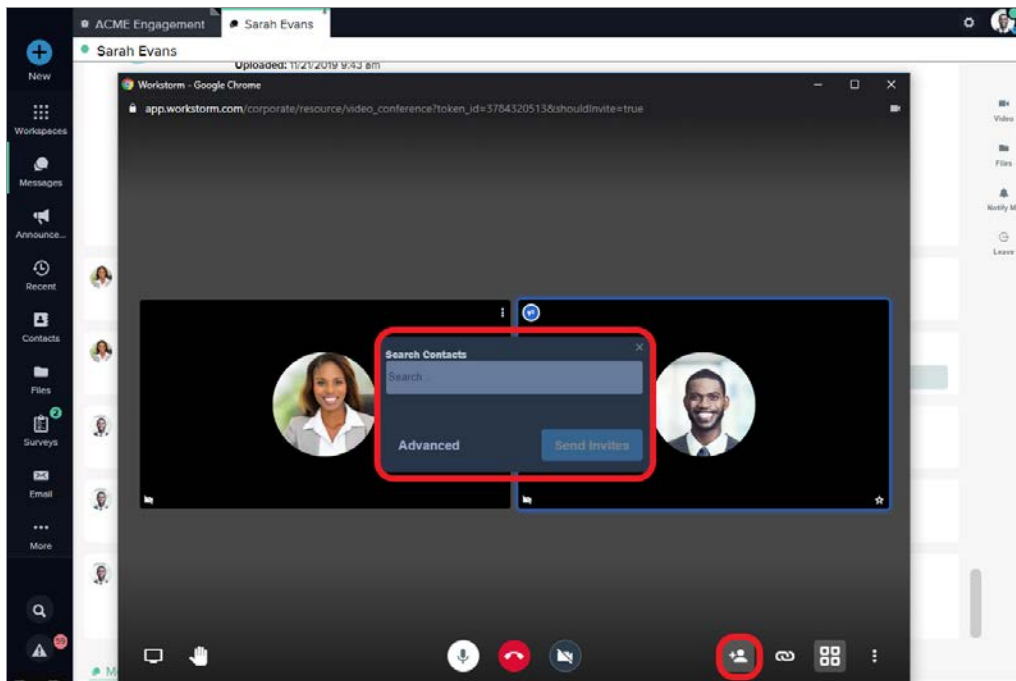


VIDEO CONFERENCING

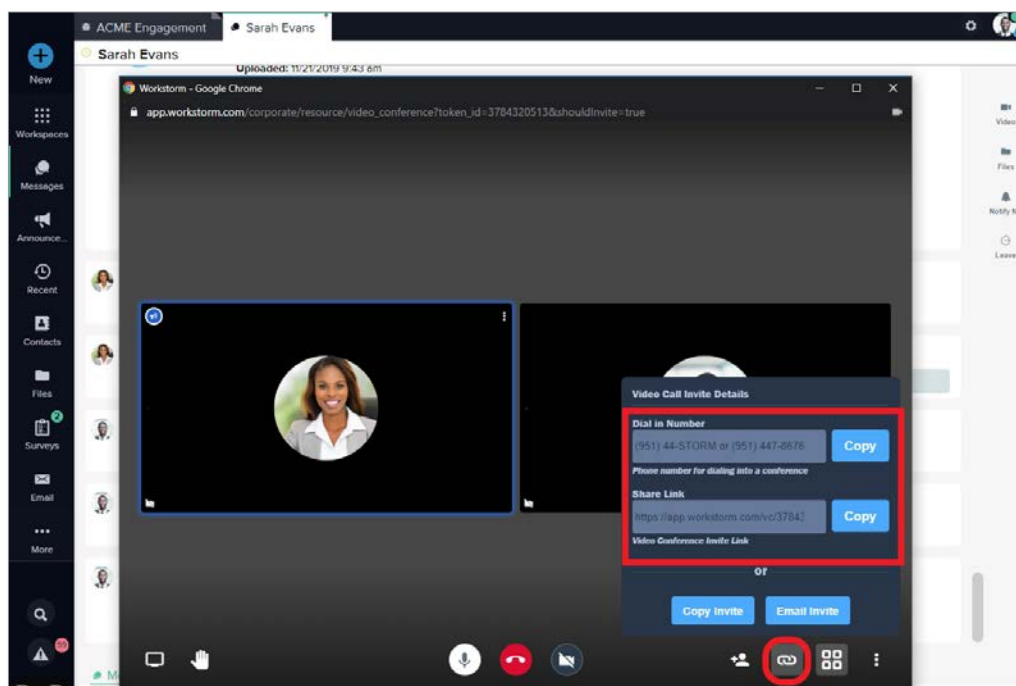
[Start a video call](#) or share your screen by selecting the  icon on the right toolbar within a private or team conversation or Workspace.



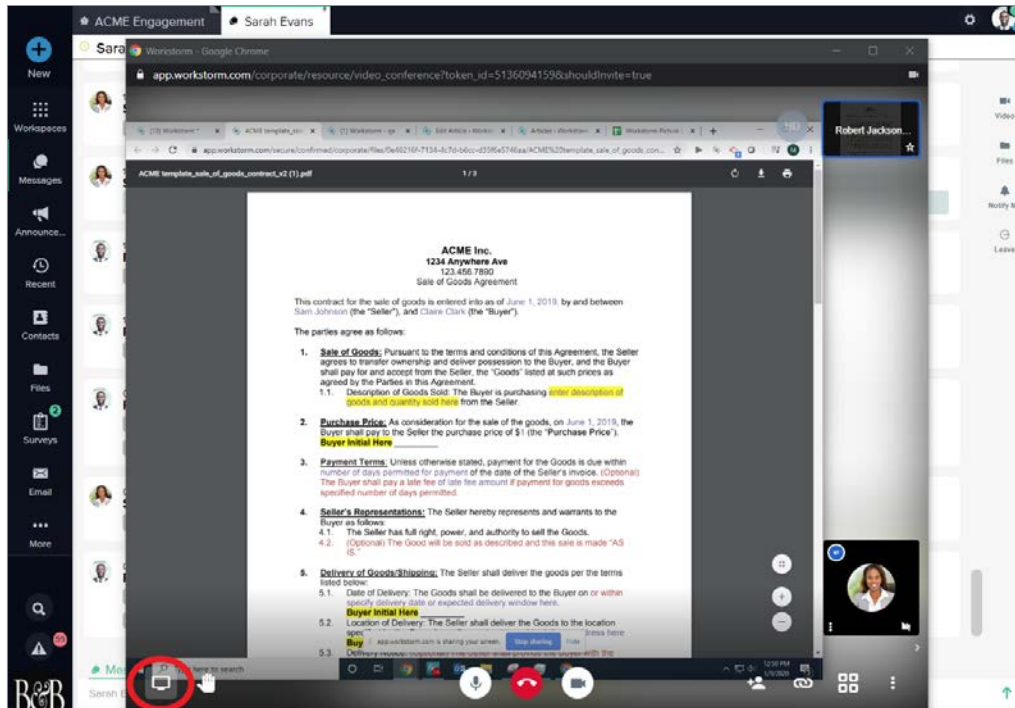
Invite additional participants by clicking the invite icon at the bottom right of video call window. Search for members and select their names to invite them to the call.




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.

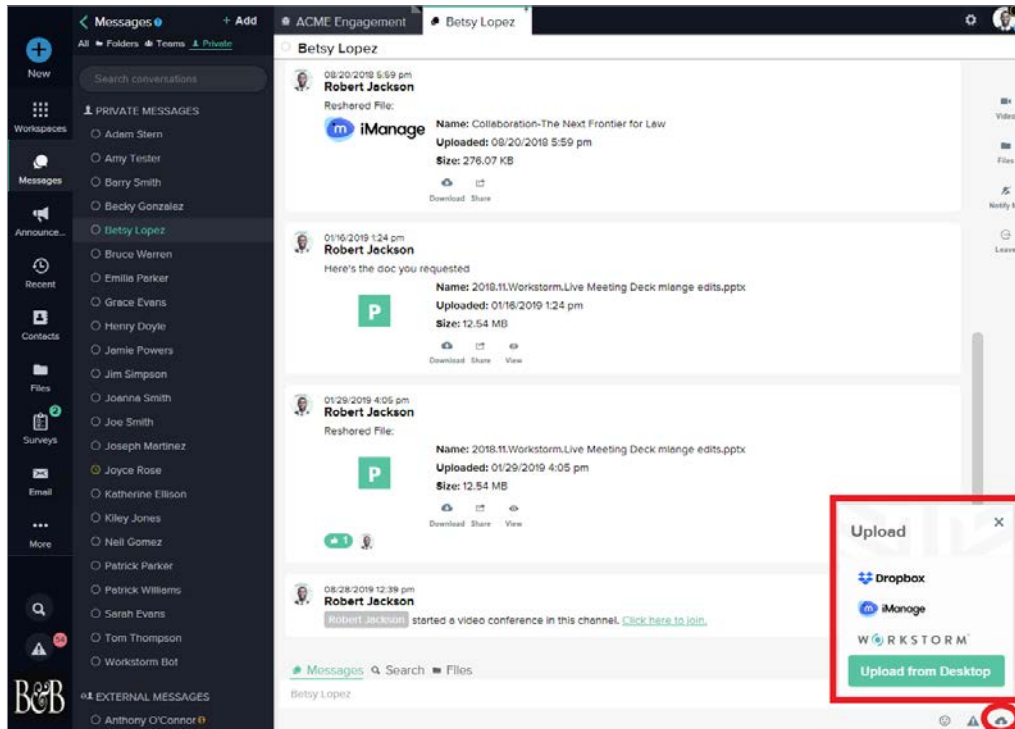


If you would like to share your screen, click the monitor icon on the bottom left of the video call window. Up to 12 people can share their screen at a time.





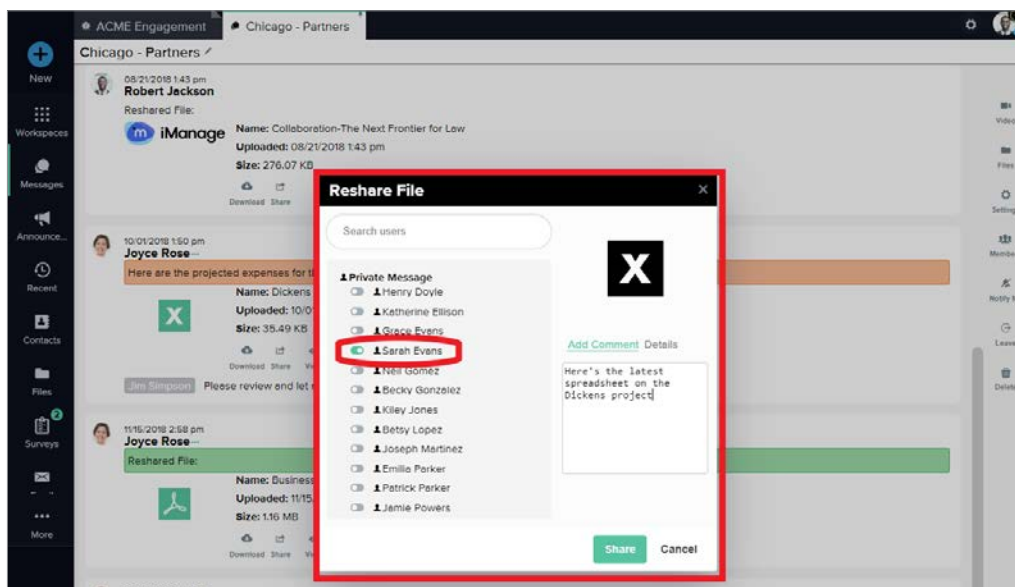
FILE SHARING

[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.

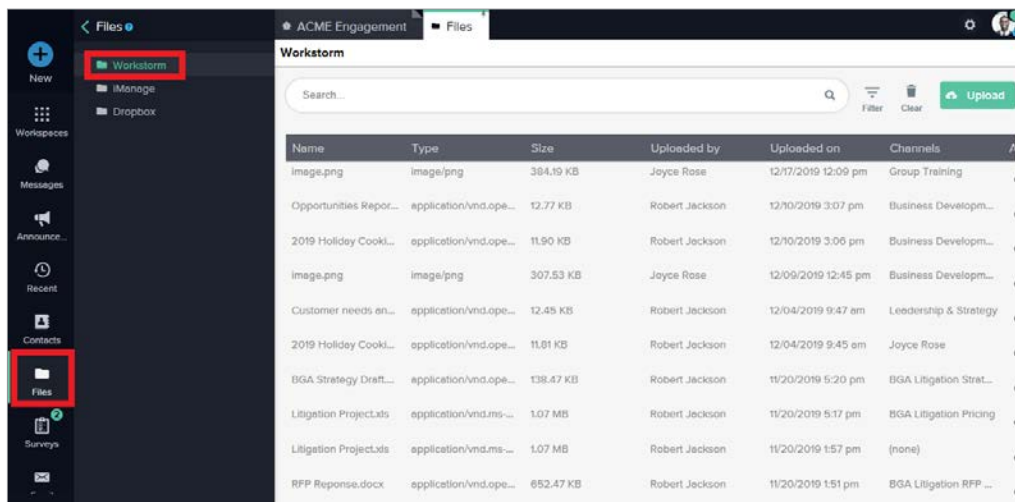


Choose to upload a file from your Workstorm File repository, your Desktop or one of your integrated Document Management Solutions, like Dropbox. Add a comment to accompany the uploaded file in the provided text box.

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.

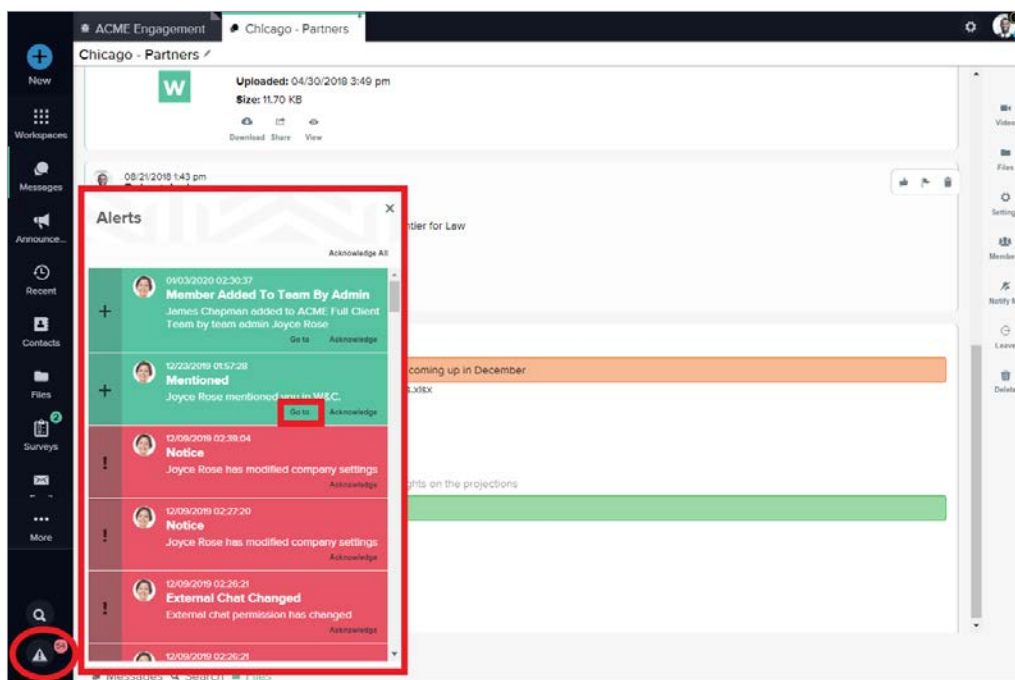


ALERTS

[Alerts](#)  appear in the left menu when you:


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

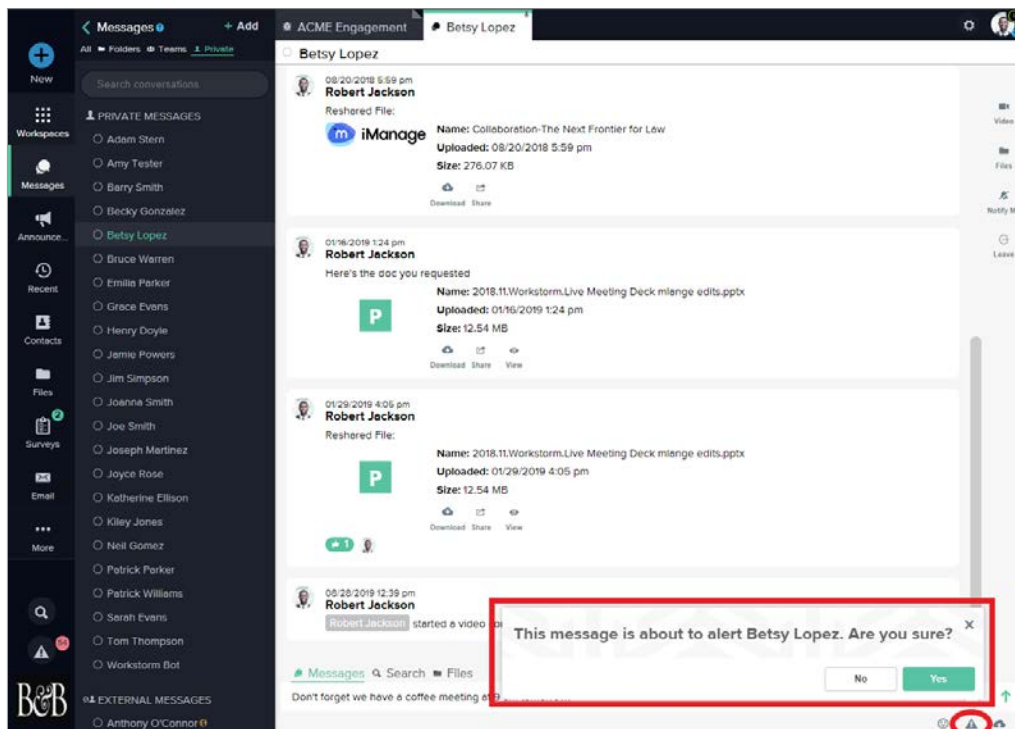
Click on the Alert icon  near the bottom of the left side bar to access your Alerts menu. You can click [Go To](#) to see alerts within the conversation they originated from or select [Acknowledge](#) or [Acknowledge All](#) to dismiss unread alerts.



URGENT MESSAGES

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

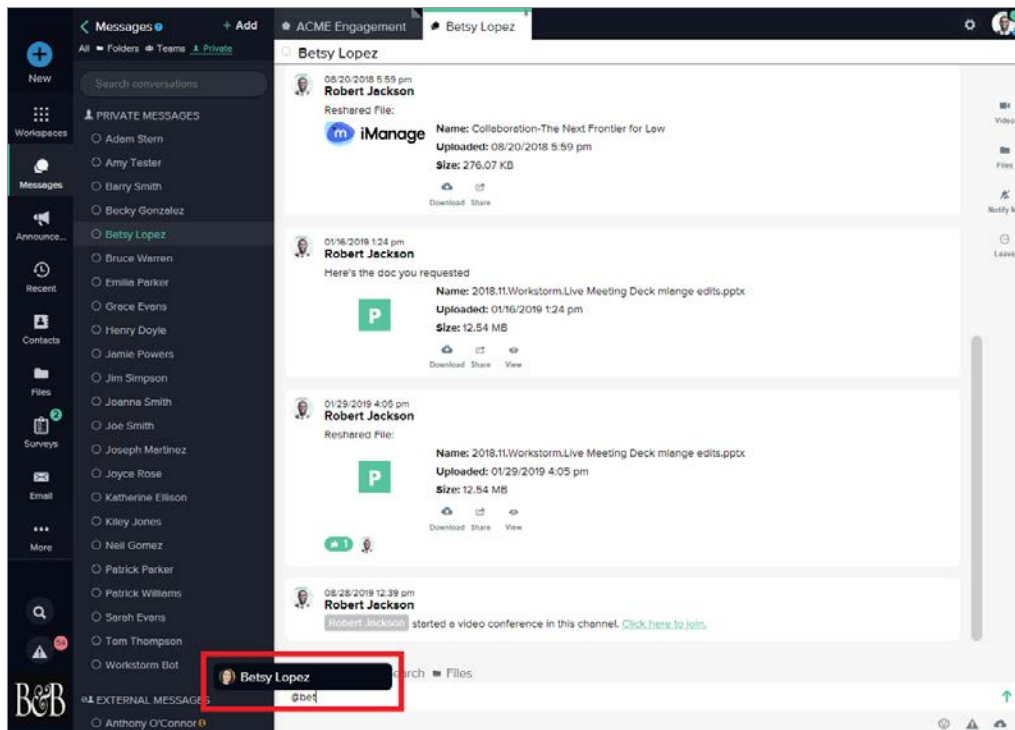
Send urgent messages by clicking the  icon in the message box, instead of pressing **Enter** on your keyboard.



MENTIONS

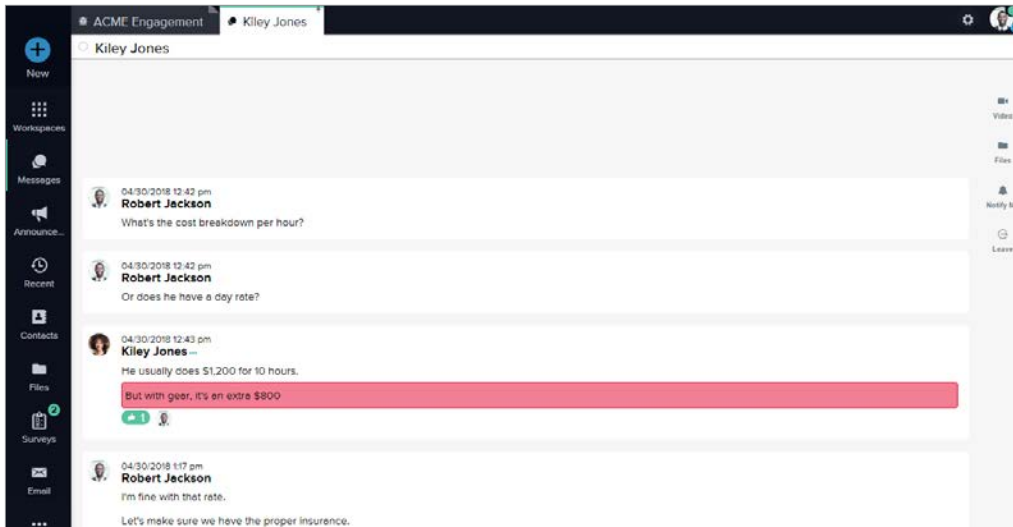
Use [@mentions](#) to trigger an [Alert](#) to an individual member in a team or private conversation.

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

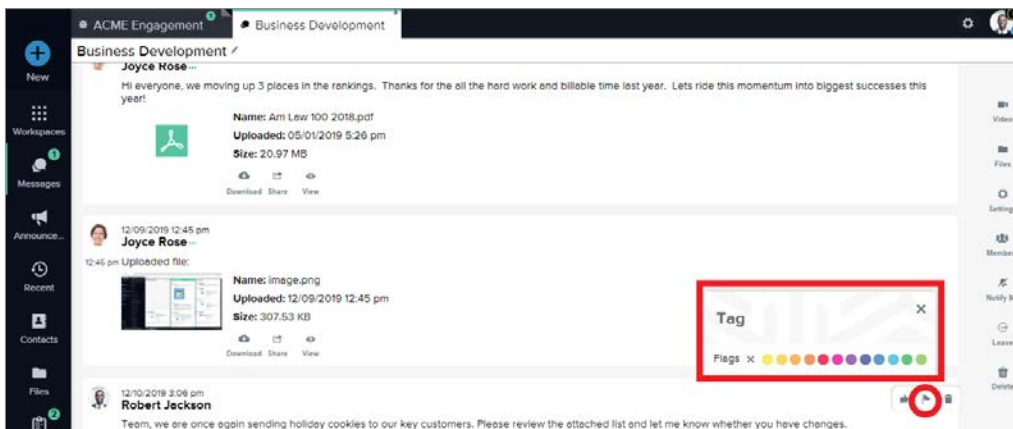


REACTIONS

Show that you like a message by clicking the 👍 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.

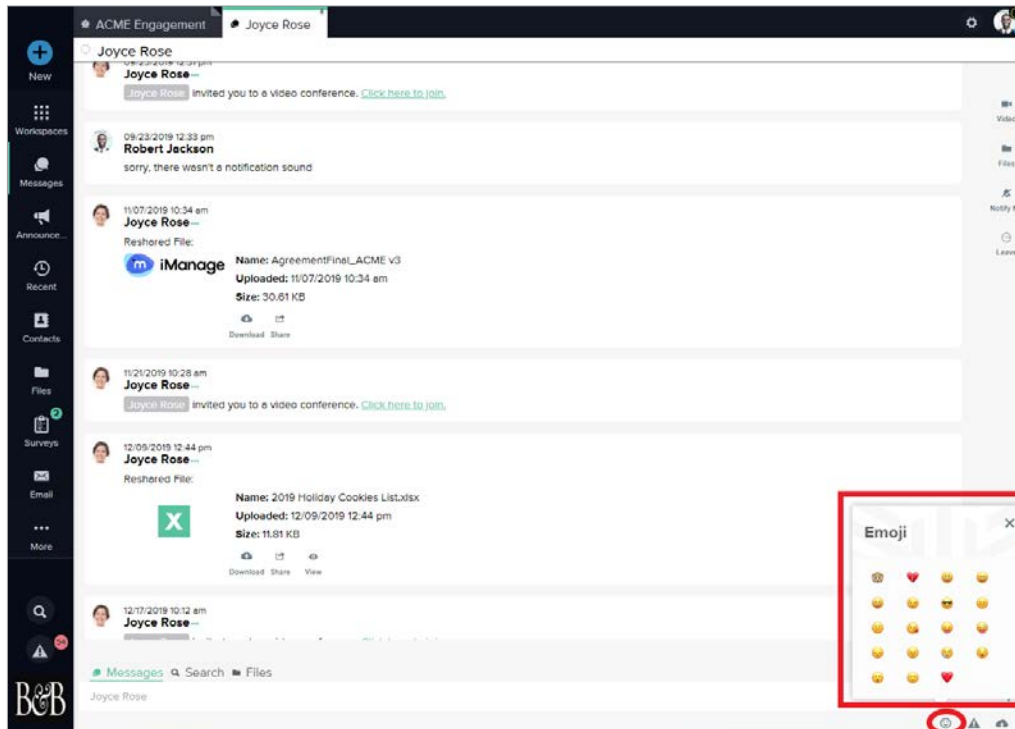


Flag and color-code messages to aid in search by clicking the 🚩 icon in the upper right corner of the message.



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.

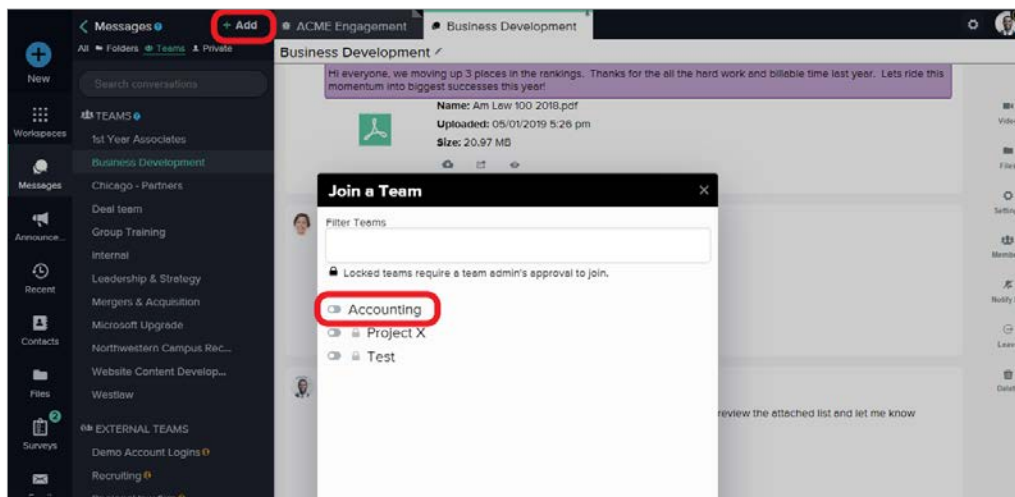
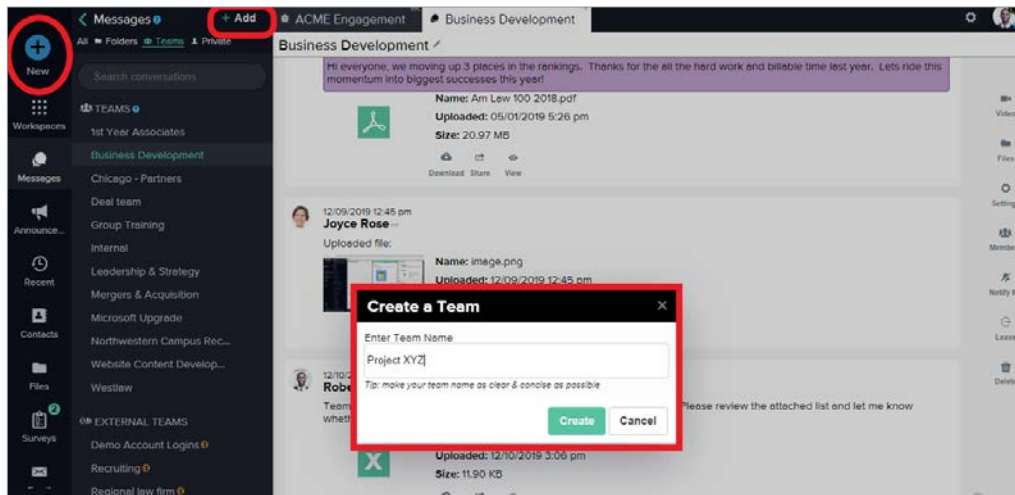
GIPHYs

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 blue plus icon  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.



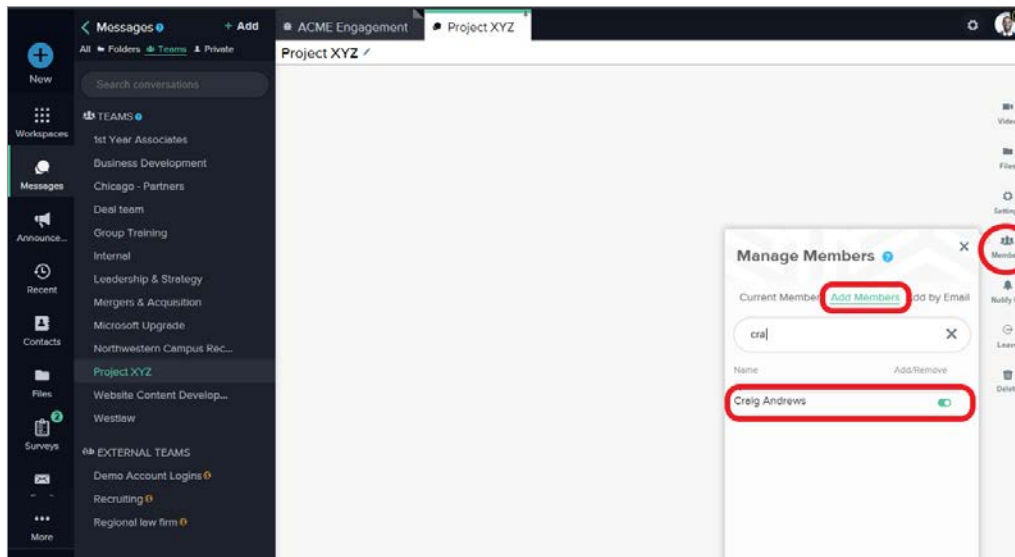
TEAM ADMIN/CREATOR

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

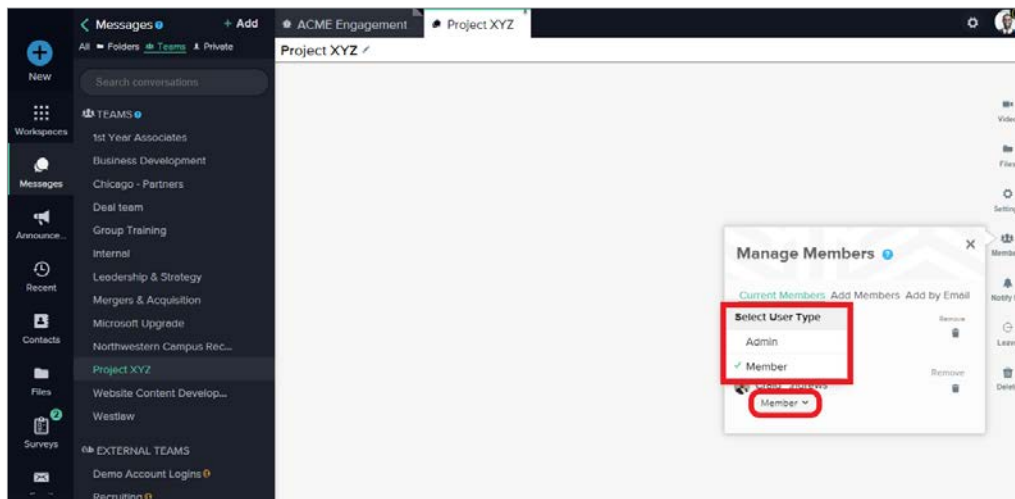
Edit the team name, whether it's a private or public team, by clicking on the  icon to the right of the Team name in the Team's expanded conversation.

Select  icon to manage Team privacy settings


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

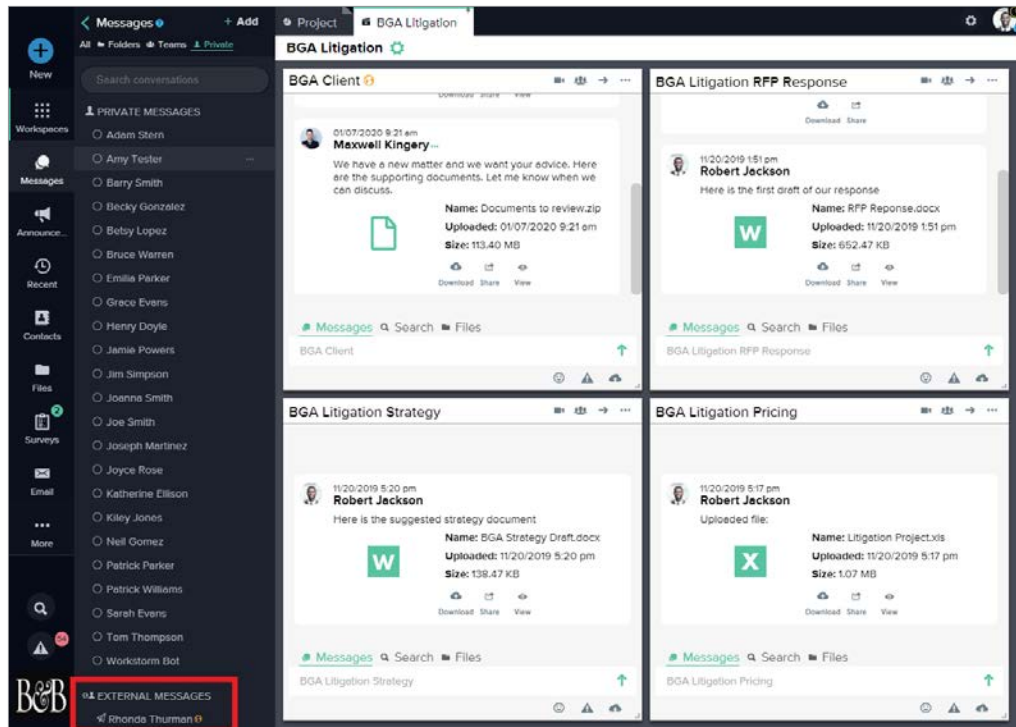


Appoint additional Team Admins using the dropdown.



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.

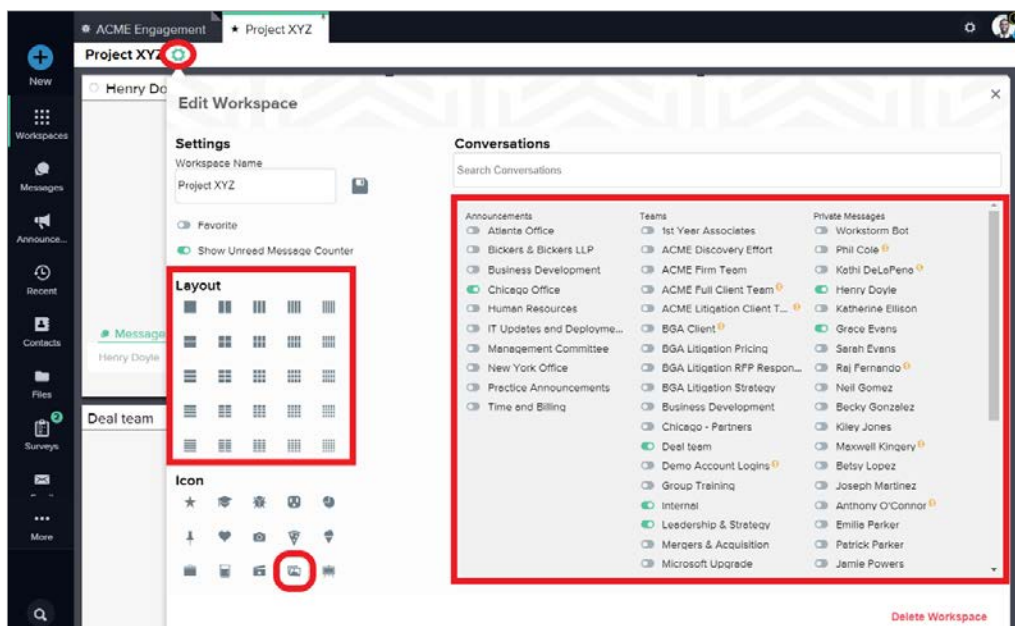
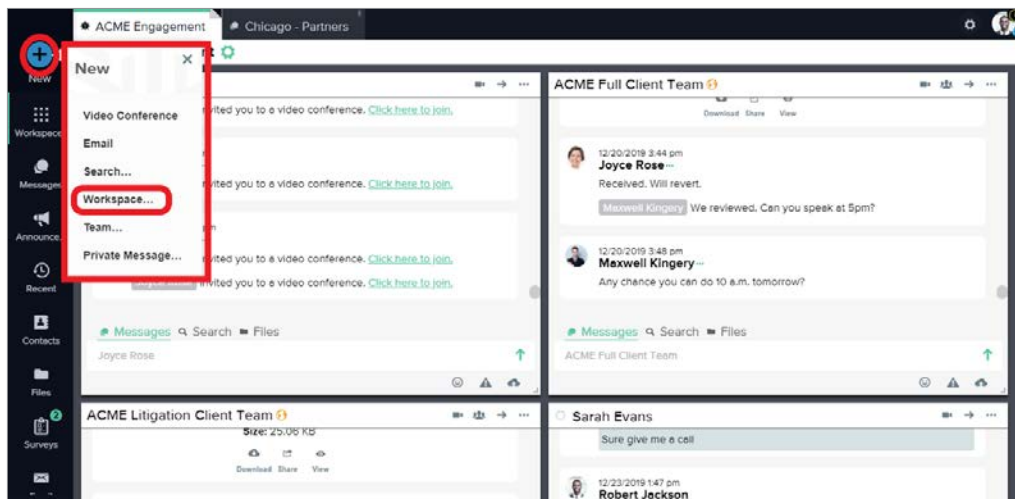


ADDITIONAL FEATURES

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

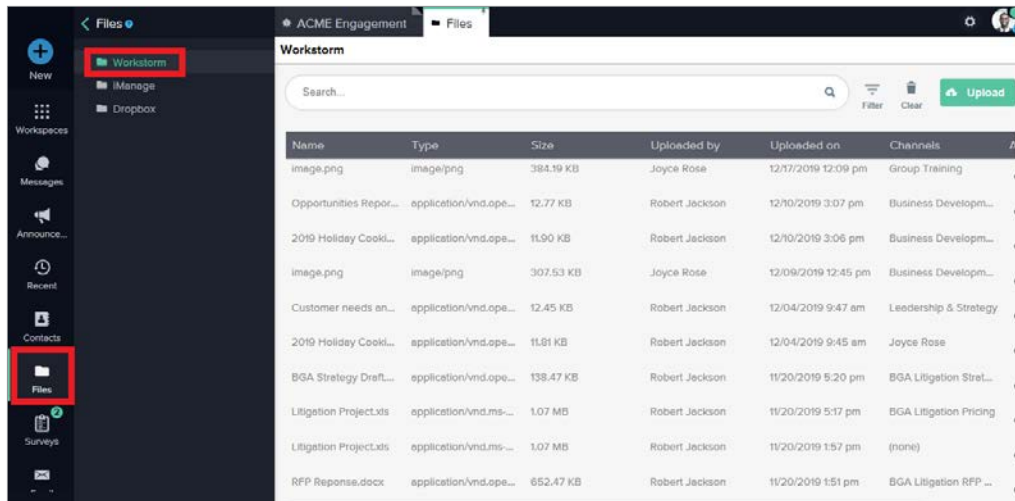
WORKSPACES

Organize related teams and private conversations into [Workspaces](#) by selecting the 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.



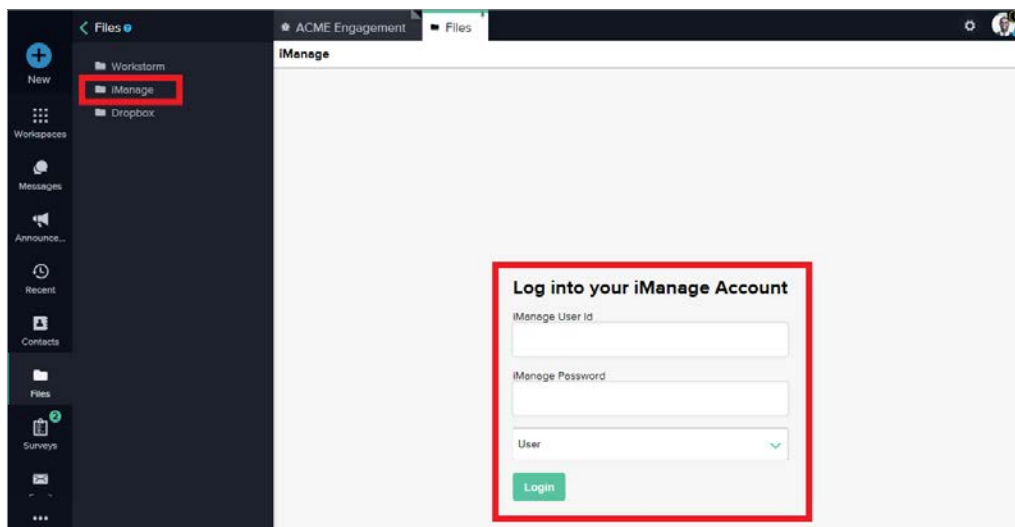
FILE MANAGEMENT

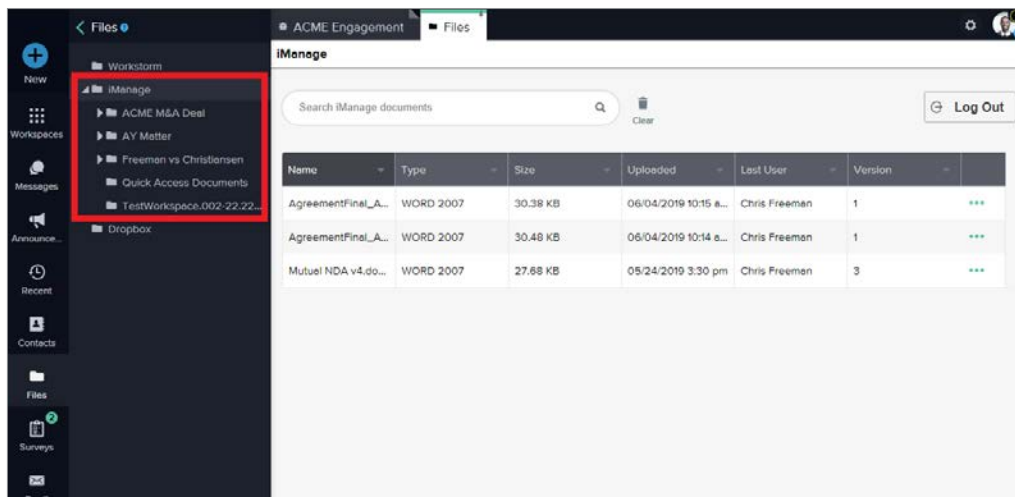
All files uploaded by or shared with you can be found in your Workstorm File Repository in the left menu. You may also upload, share, view and search for files here.



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.

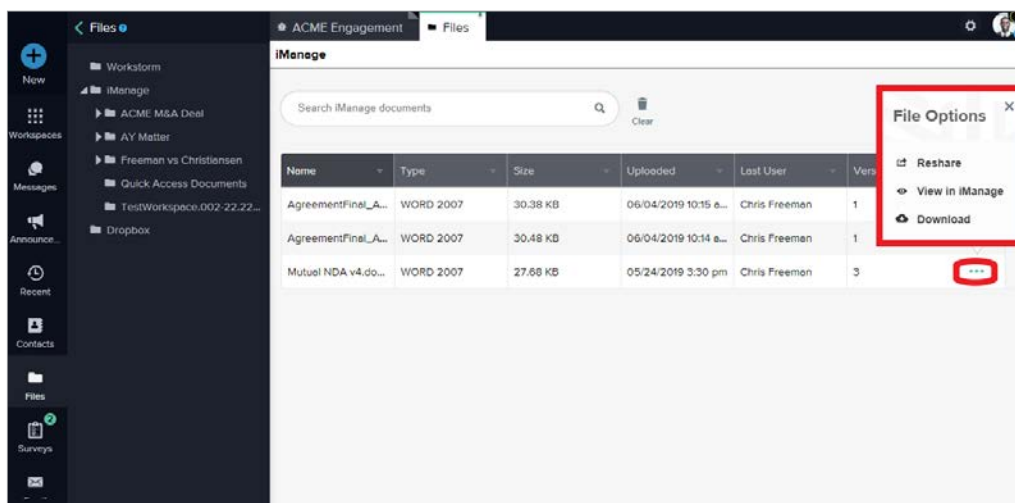
Click on the DMS folder, and enter your credentials to login to your DMS account.





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.

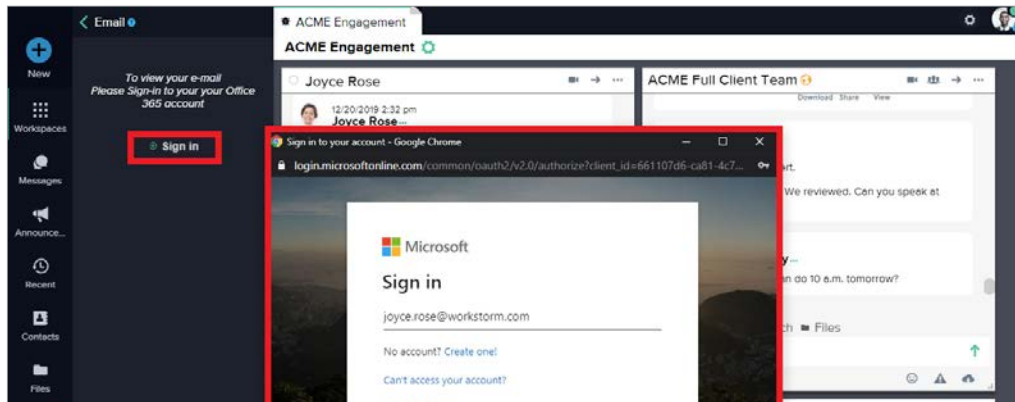
Click the three dots next to the file and then [View](#) to open a new tab inside the DMS system to edit or update the file and maintain version control or select download to save it to your desktop.



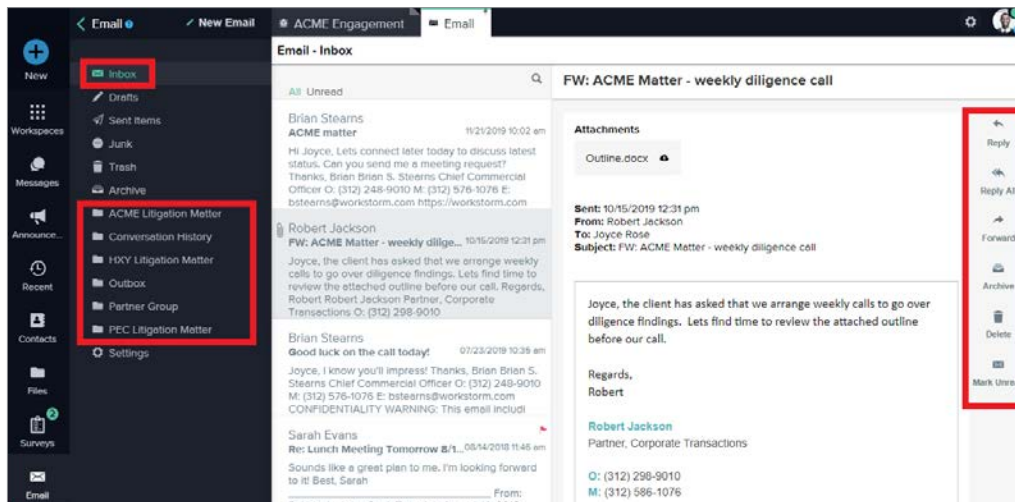
EMAIL/CALENDAR INTEGRATION

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.

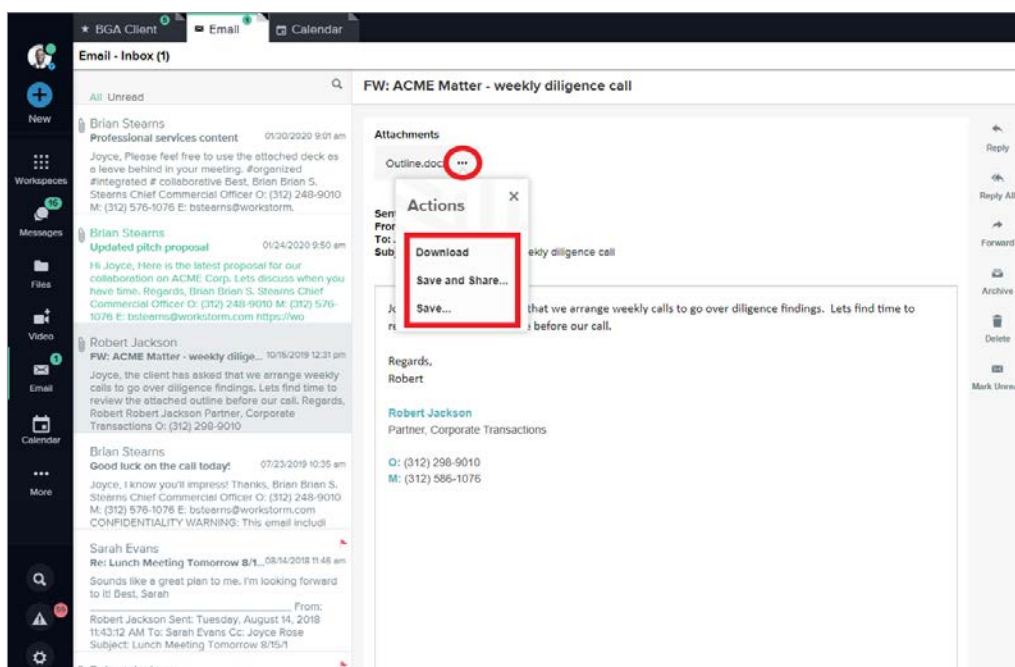
NOTE: If you do not see **Email** in the left menu, contact your site administrator to enable the Email integration feature.



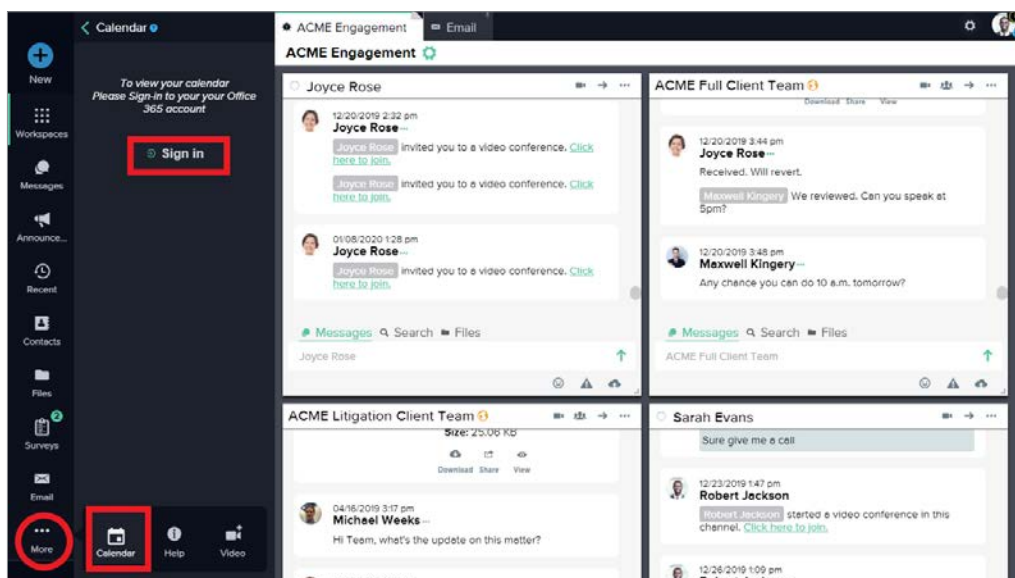
Access your inbox, folders, and settings. Reply, forward, archive, delete, or mark the email as unread from the sidebar on the right.

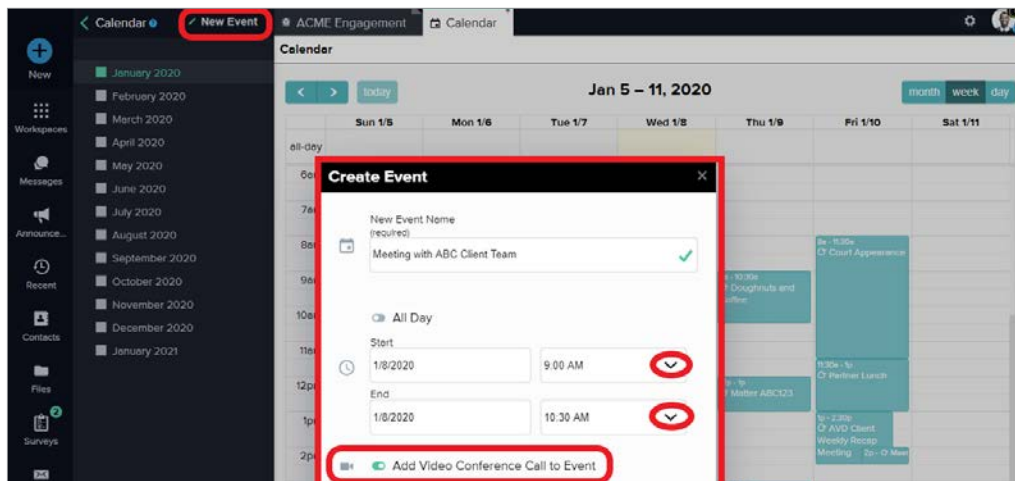
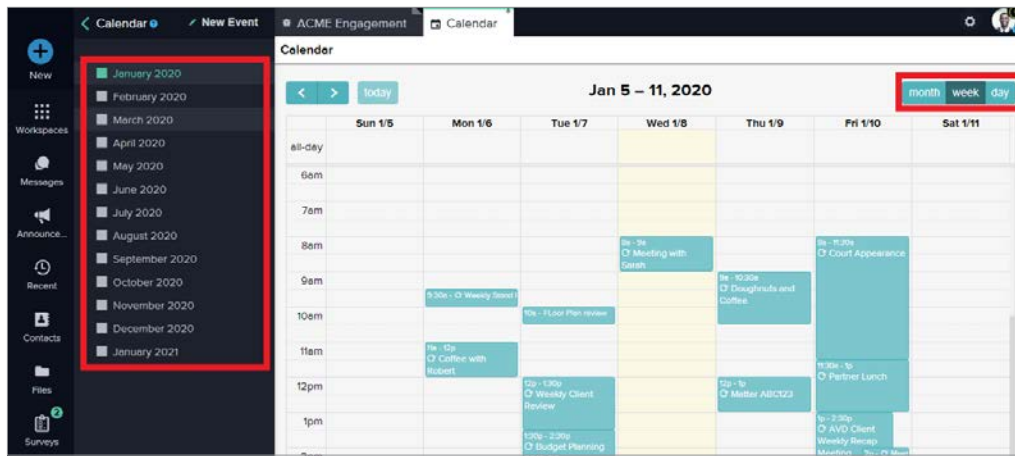


If you receive an email with an attachment, you can click the ellipsis to right of the attachment's name to bring up an action menu. Within this action menu, you can choose to download the attachment to your desktop by clicking [Download](#), save it to your Workstorm file repository by clicking [Save](#) 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.

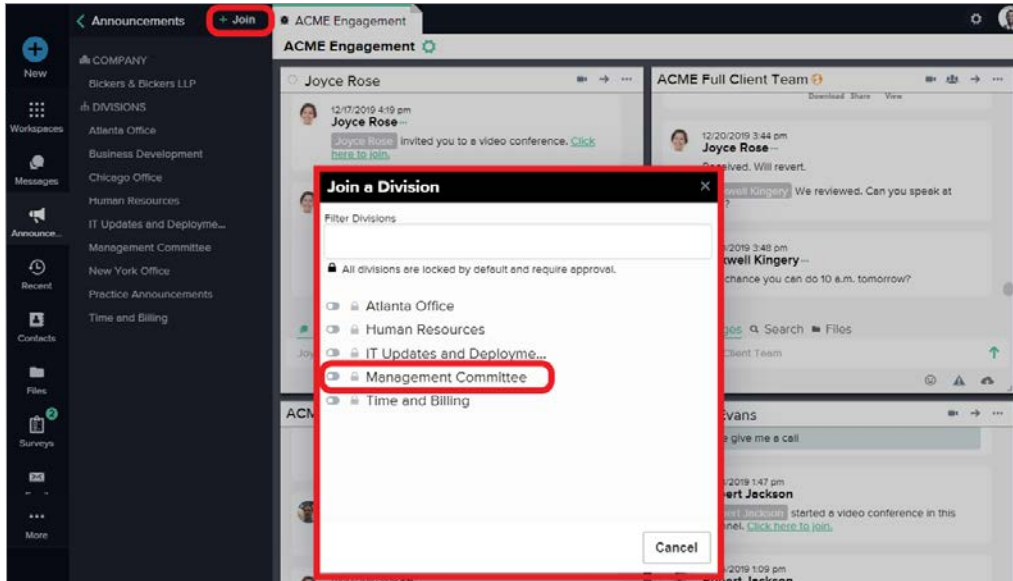




ANNOUNCEMENTS

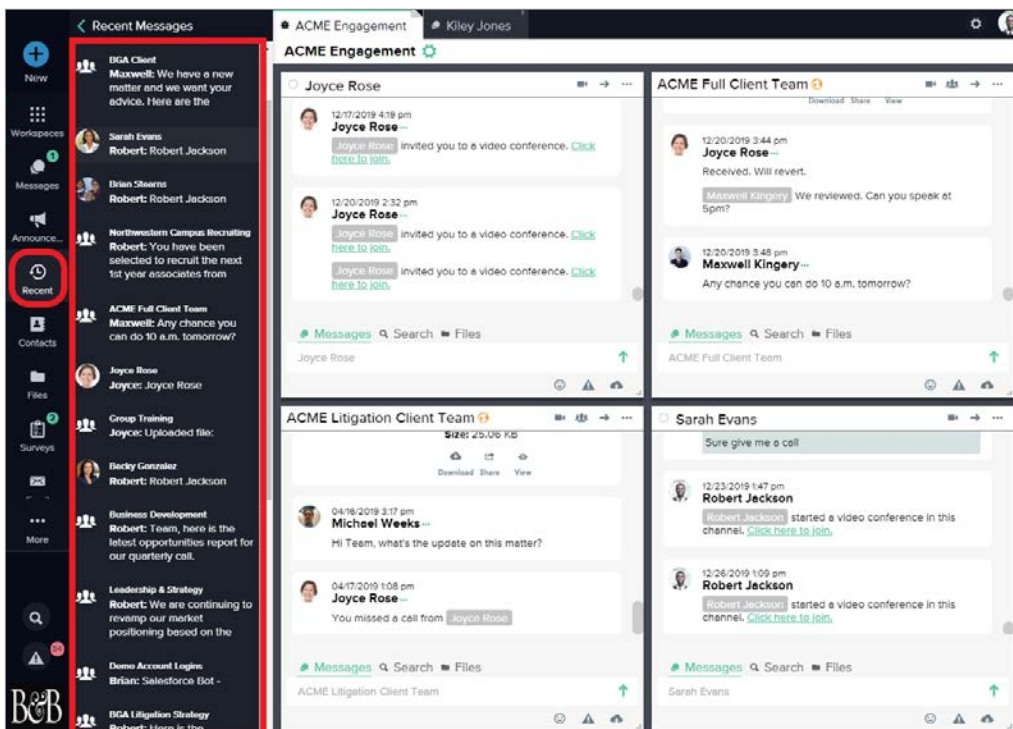
Access company-wide and Division announcements by selecting [Announcements](#) in the left menu. Click on the [Join](#) button at the top right of the sub menu to view Divisions that you can join.

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



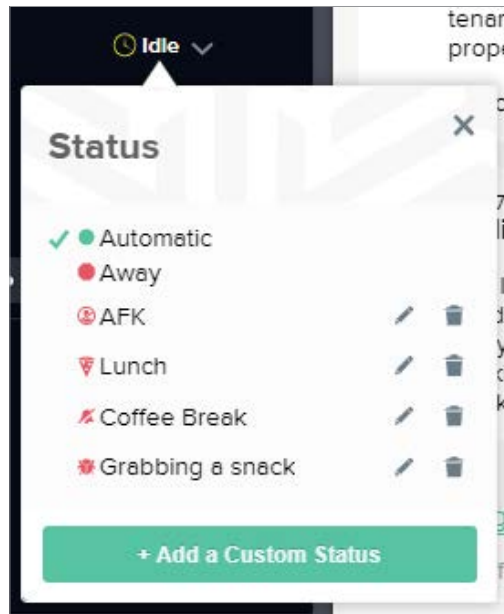
RECENT

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



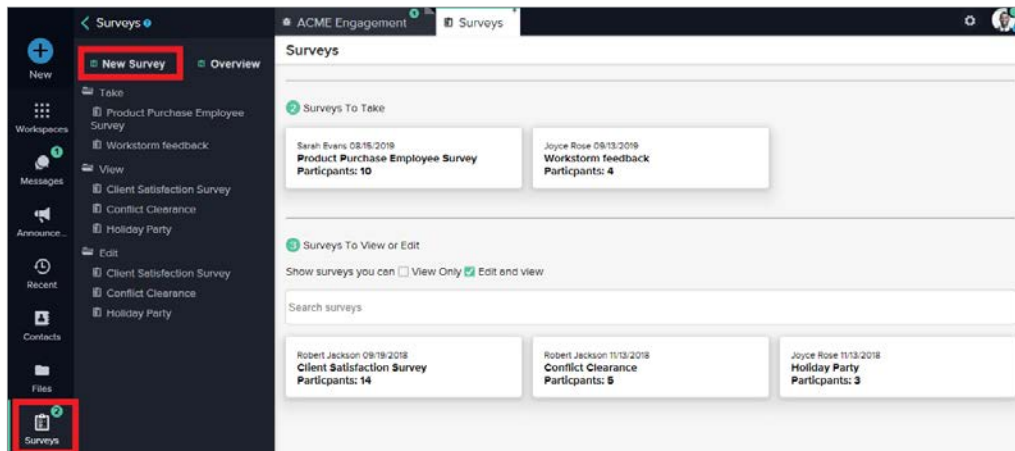
CUSTOM STATUS

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.





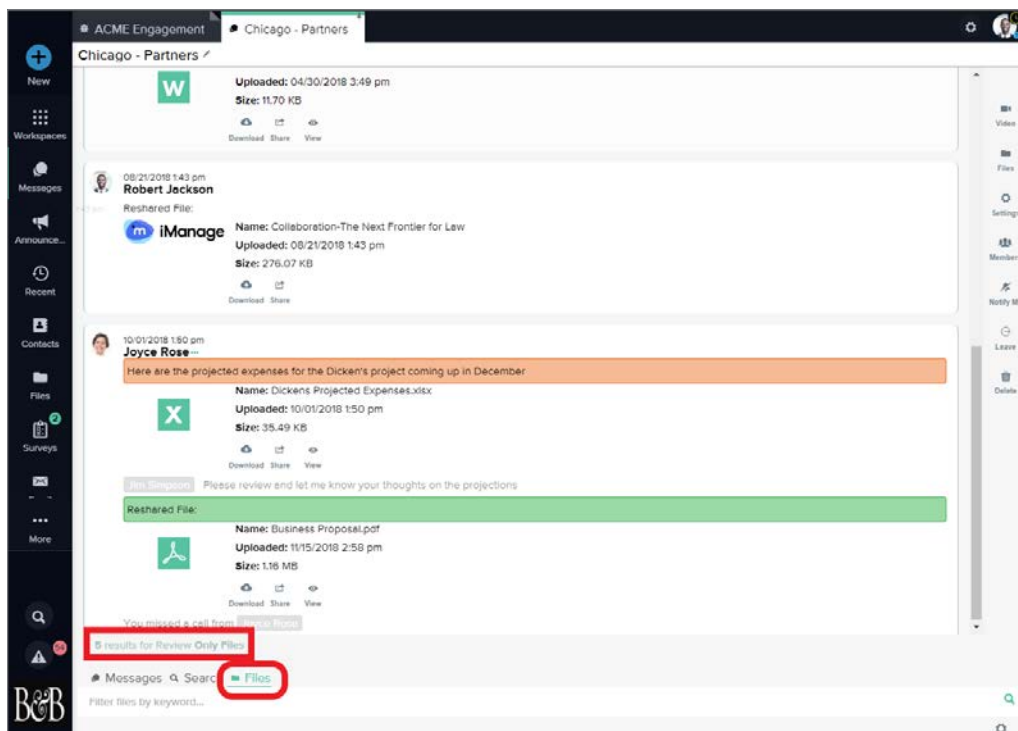
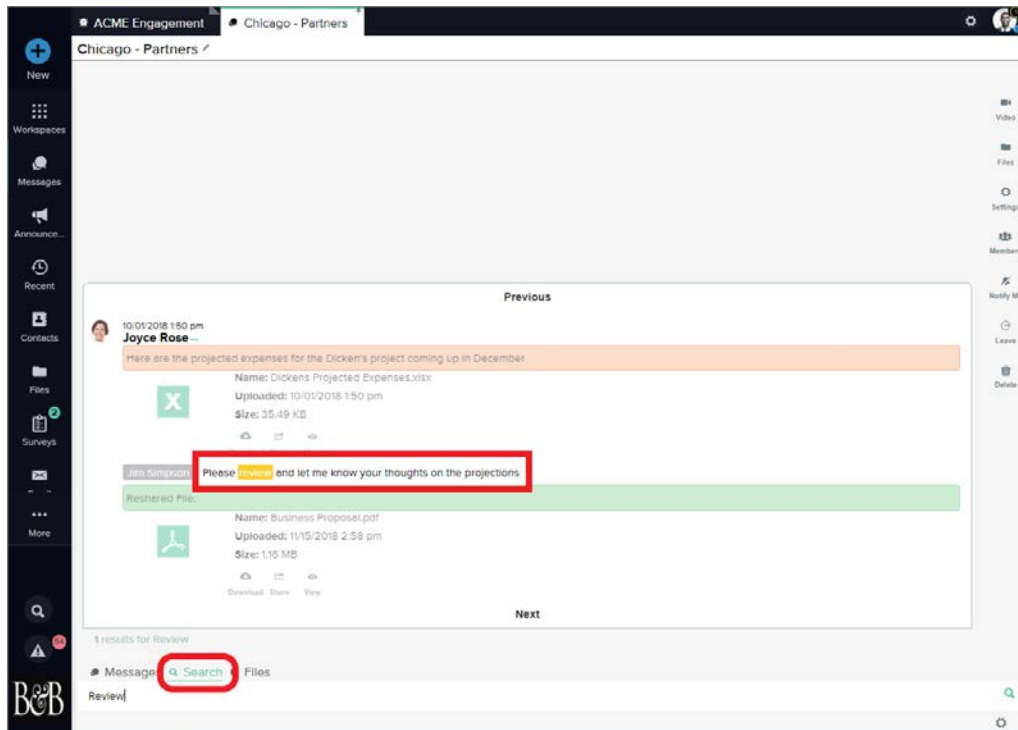
SURVEYS


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

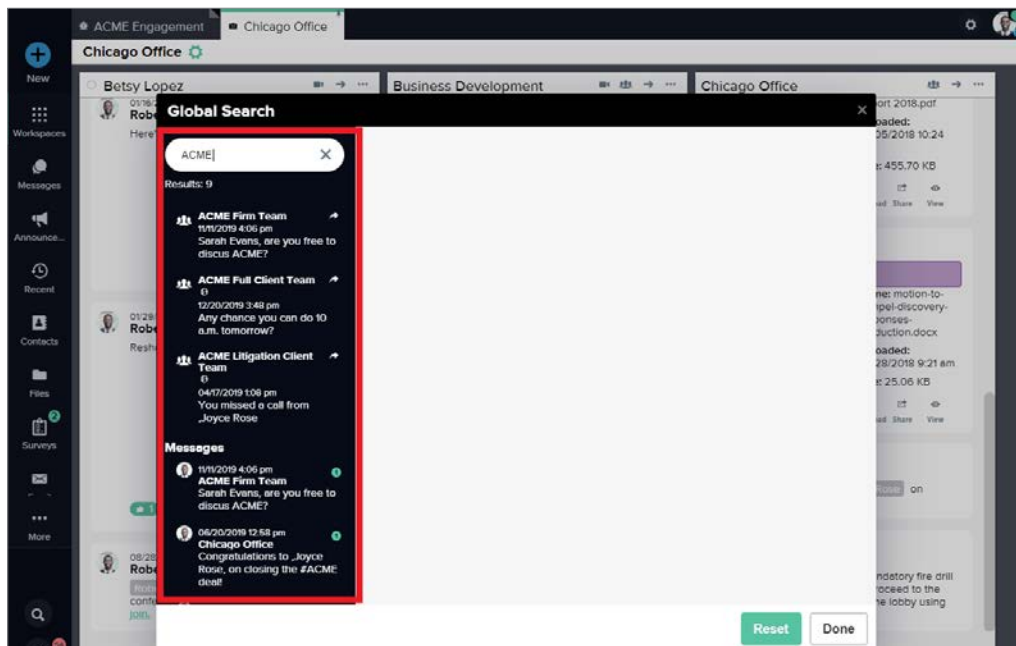


SEARCH

[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.

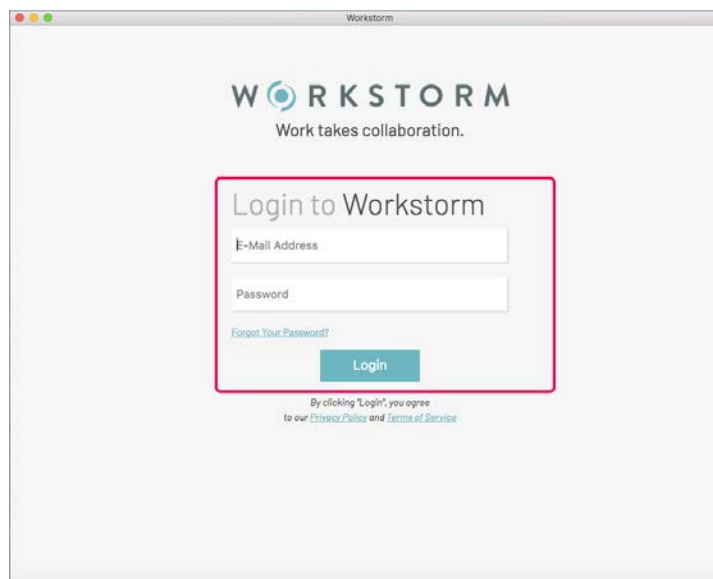


Conduct a global search for keywords across all conversations by clicking  near the bottom of your left side bar.



DESKTOP APP

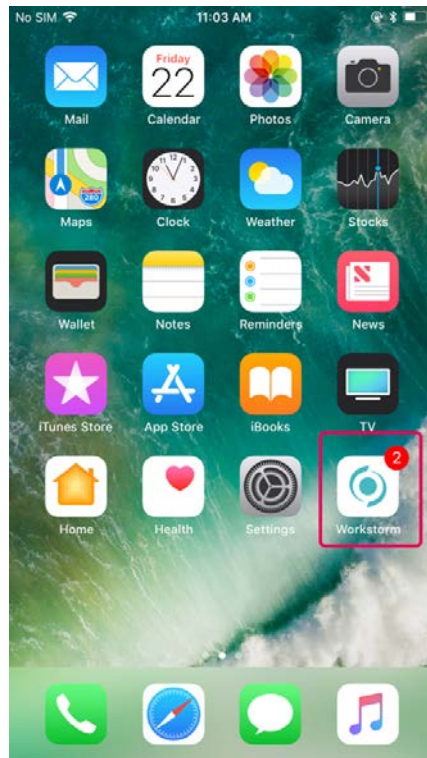
Access Workstorm via the [desktop app](#) for Mac and Windows. App users neither require a compatible browser to access Workstorm, nor the Workstorm Screen Share plugin for video calls.



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 Workstorm app. Toggle to [Allow Notifications](#), [Sounds](#) and other [Alerts](#) settings.

