WORKSTORM™

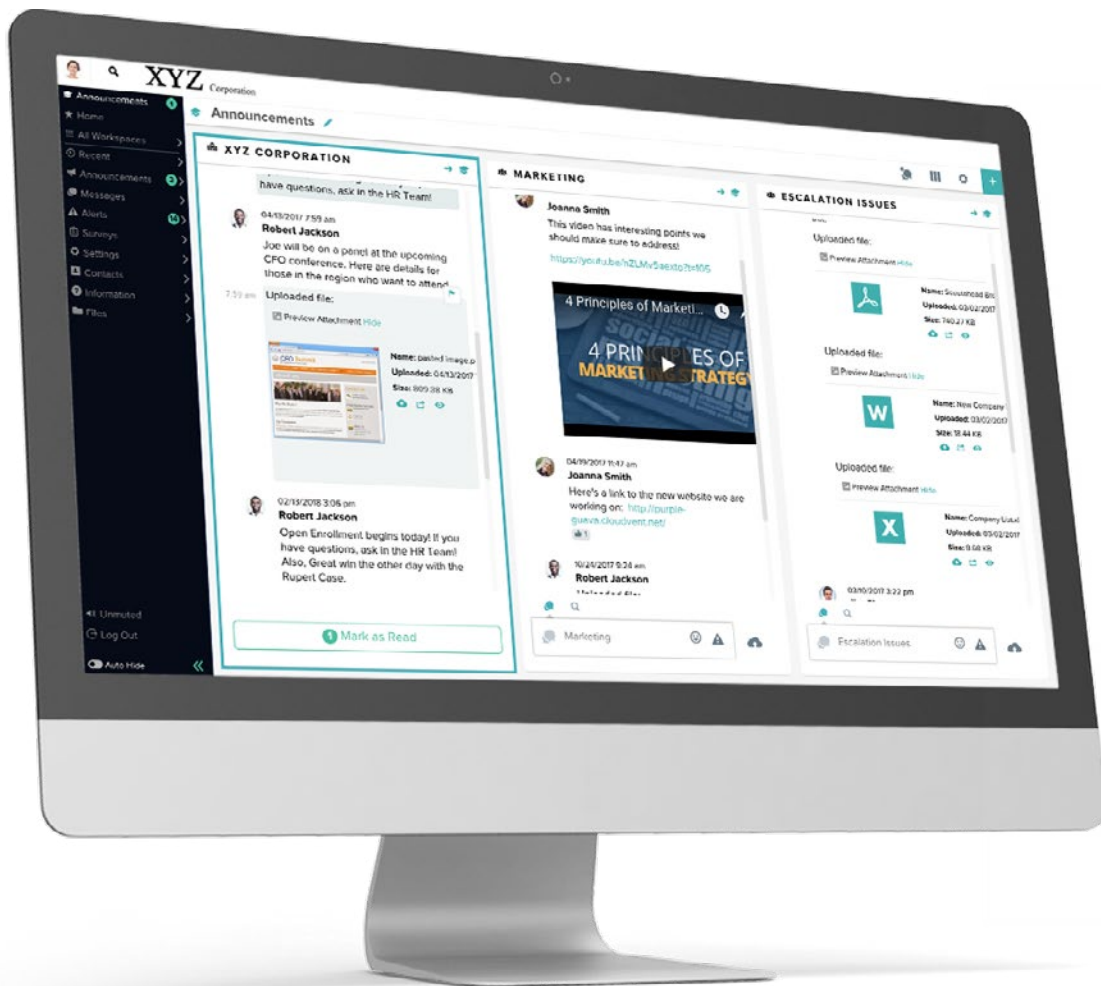## User Guide

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.
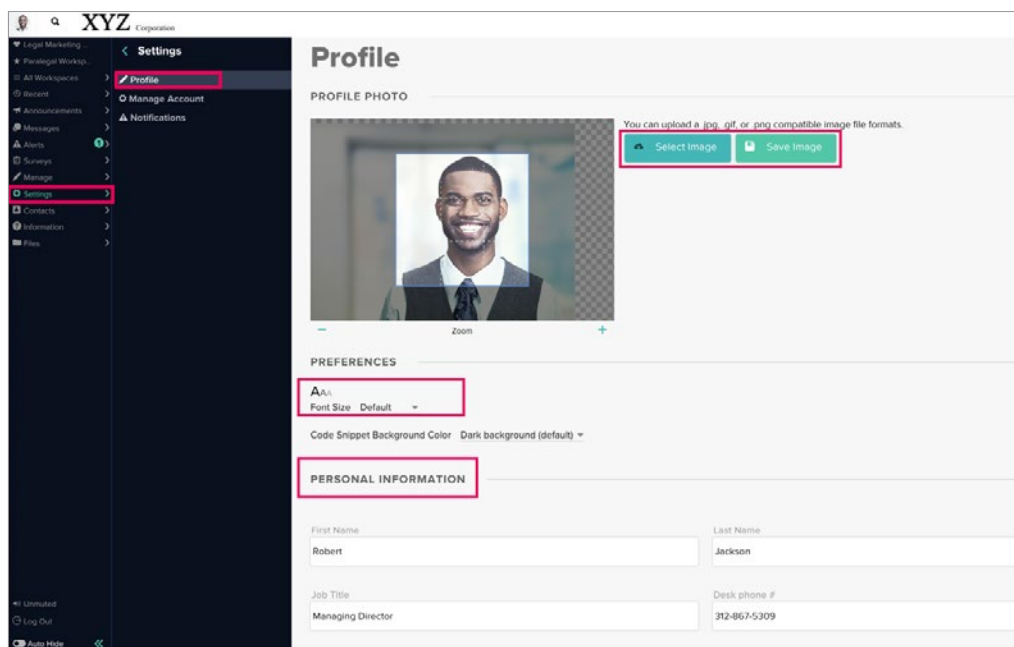
CONTENTS

ACCOUNT SETUP

[Sign up for Workstorm](#) via the email invite from [support@workstorm.com](#), sent to you by your site administrator or colleague. First time users must create a username and password.

PROFILE

Select *Settings*, then *Profile* in the left menu to customize your profile. Upload a profile picture, add contact information, and adjust font size.

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.*
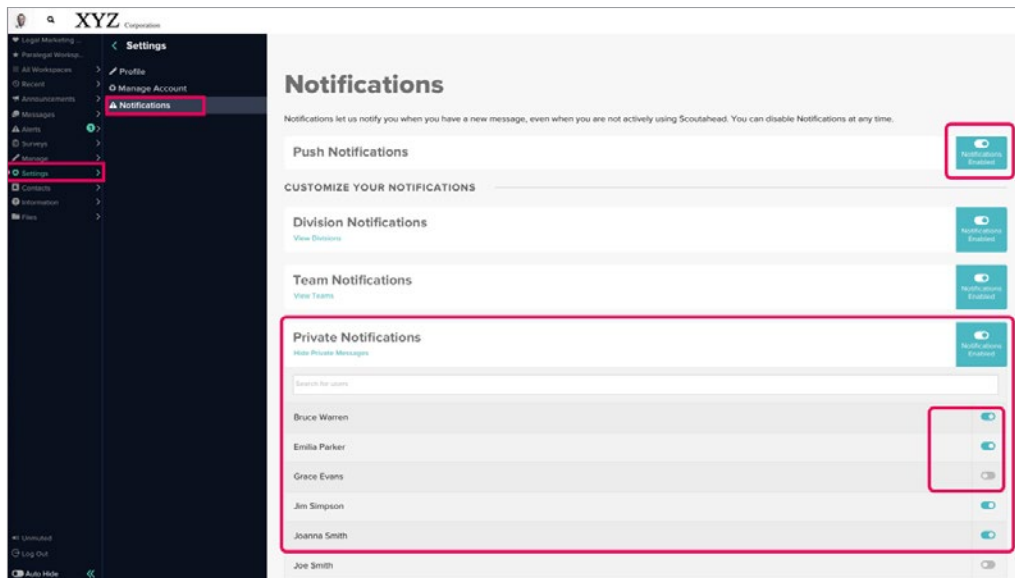
PASSWORD RESET

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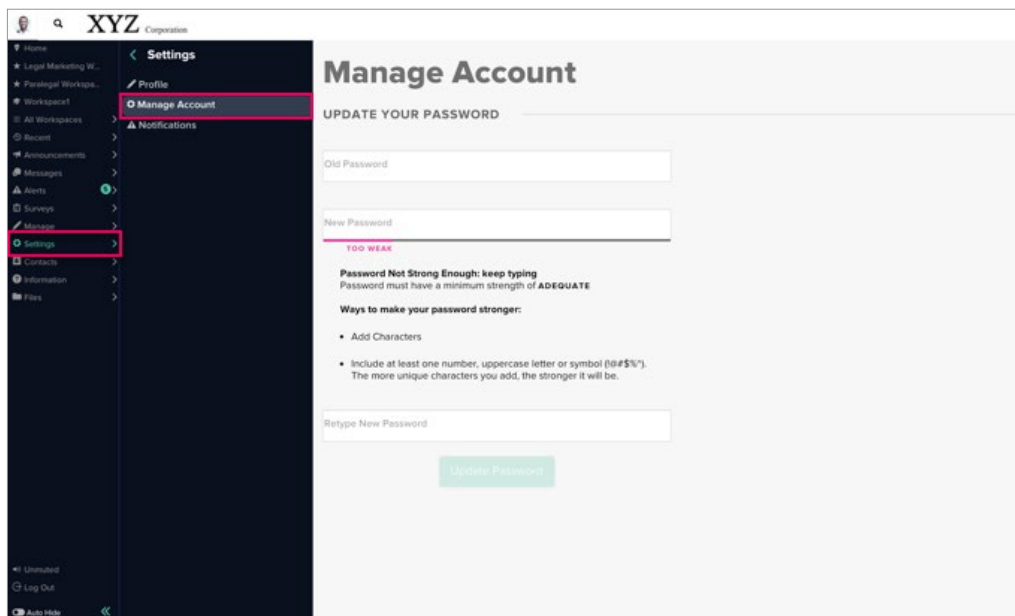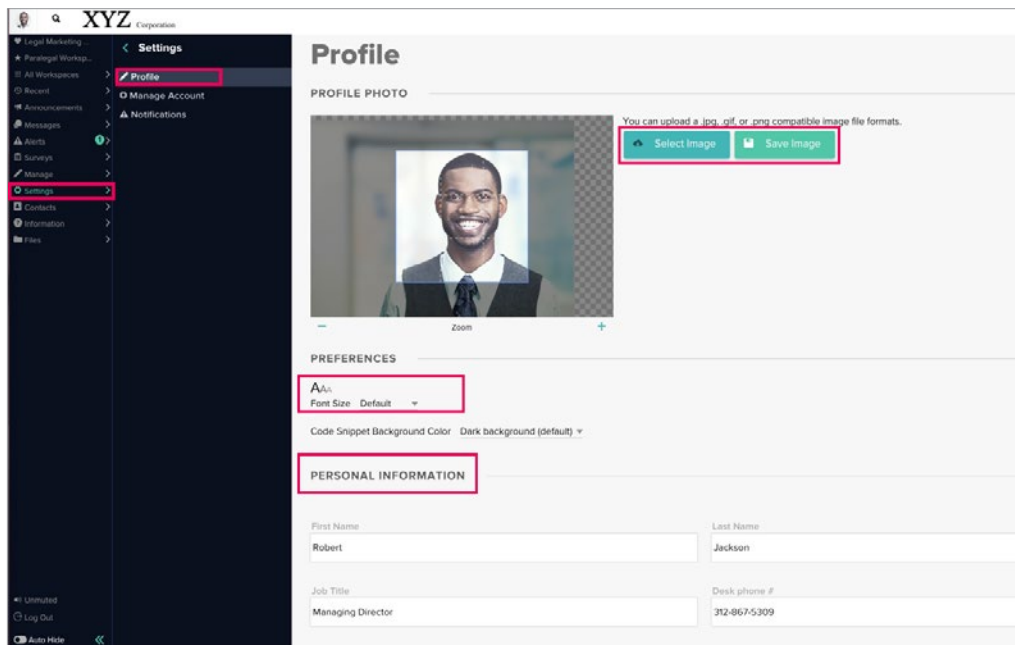
MESSAGING

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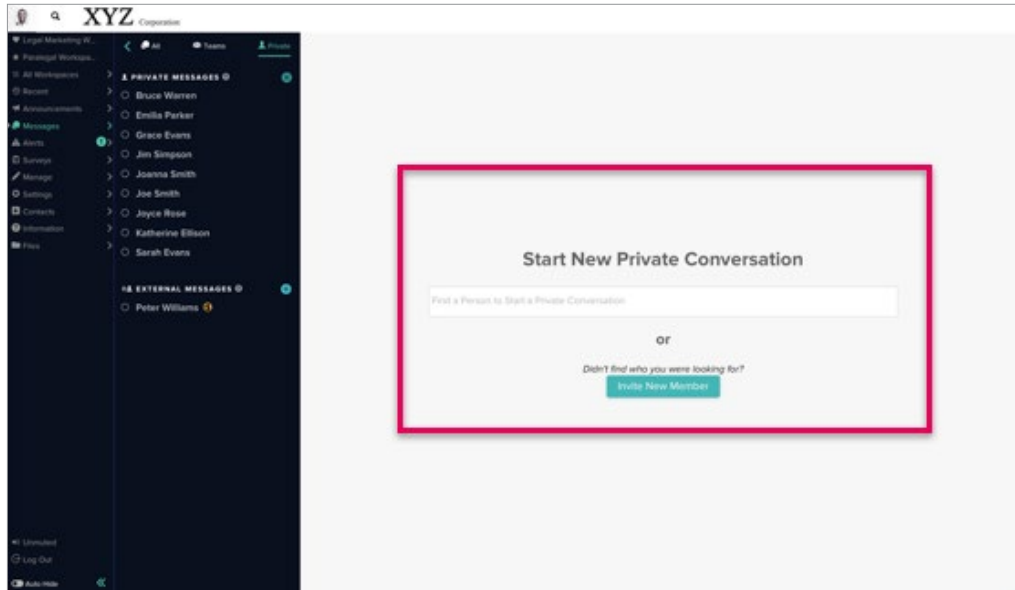
PRIVATE MESSAGES

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

To start a new one-on-one private conversation, click the ➕ icon to search for a member.

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.*
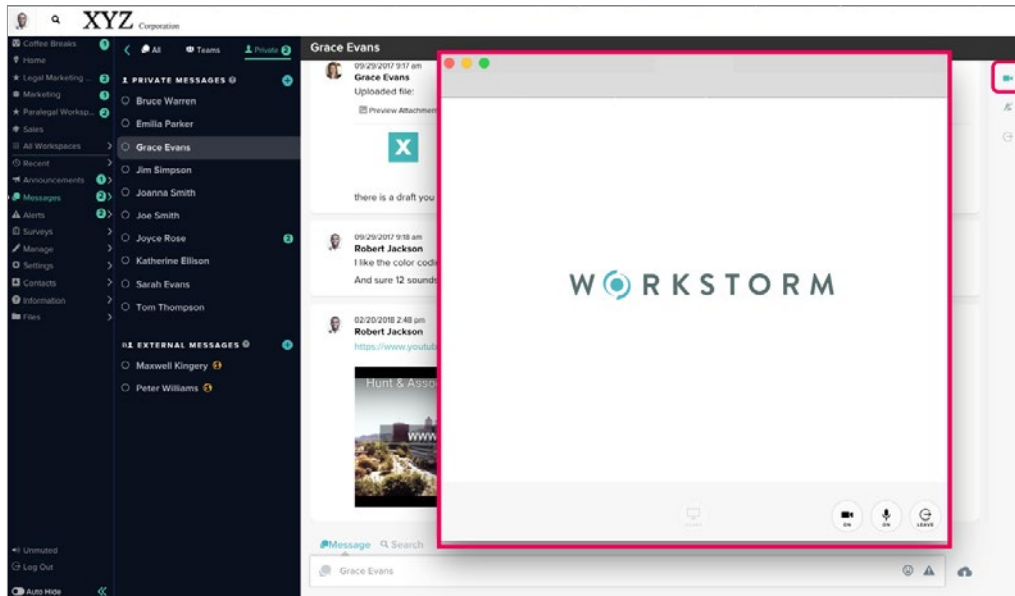

Type a message in the bottom message box, and press *Enter* on your keyboard to send the message.
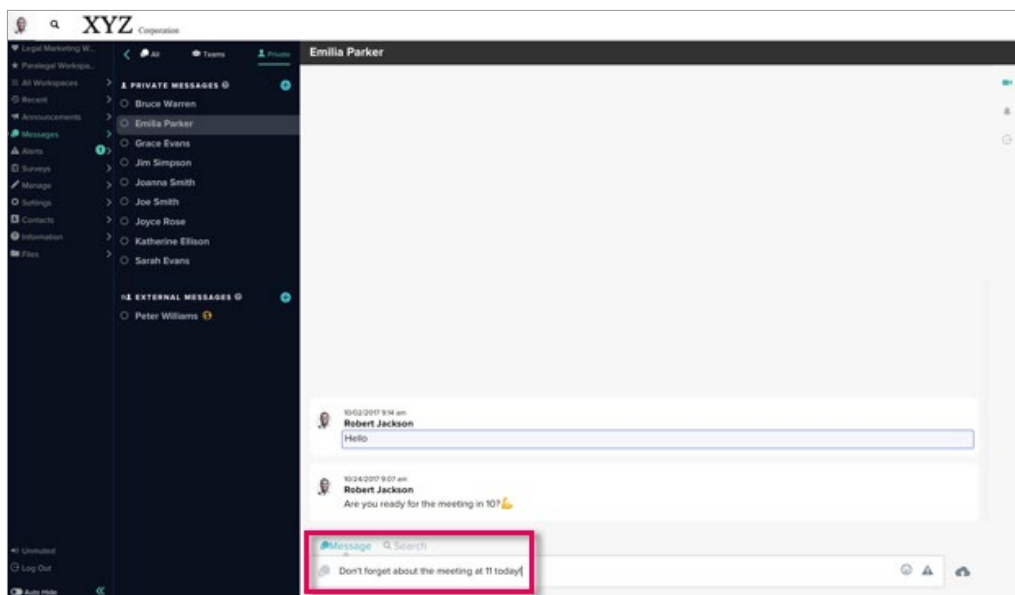
VIDEO CONFERENCING

Start a video call or share your screen by selecting the ▢◀ icon on the right toolbar within a private or team conversation or Workspace.


Download and install the WebRTC plugin, if prompted. Allow access to your camera and microphone, and permit pop-ups under the Settings or Preferences tab of your web browser.

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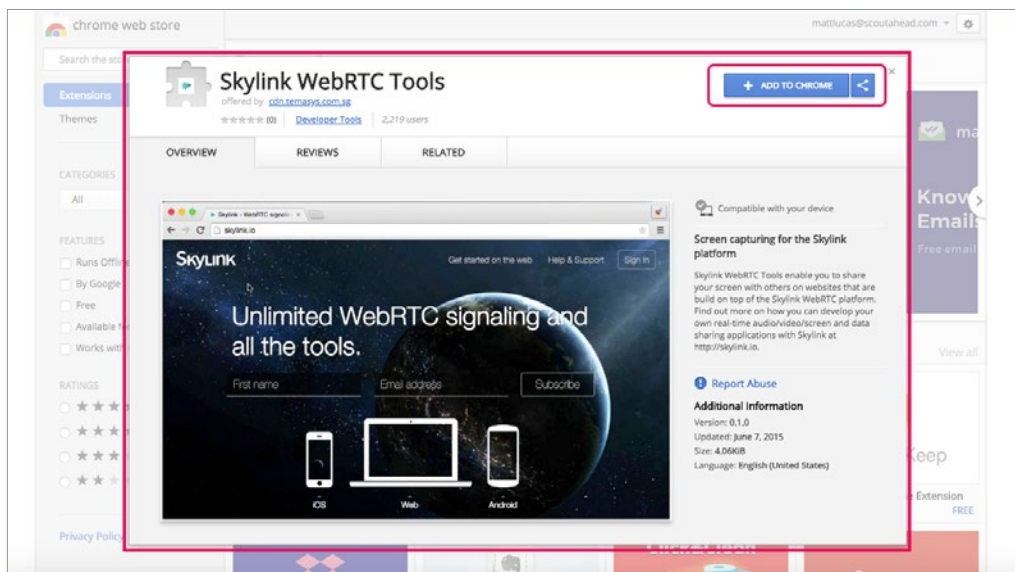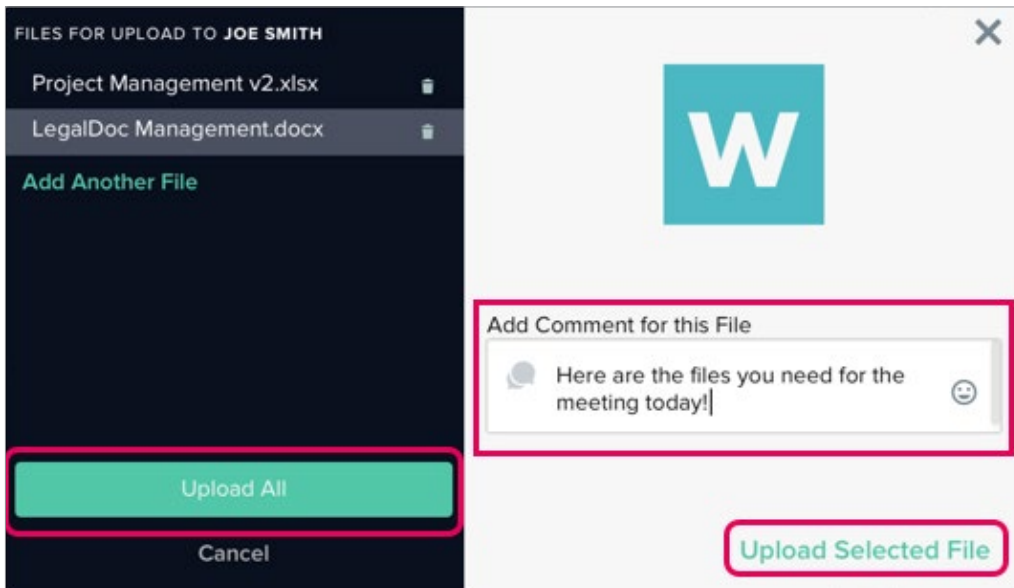
FILE SHARING

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.
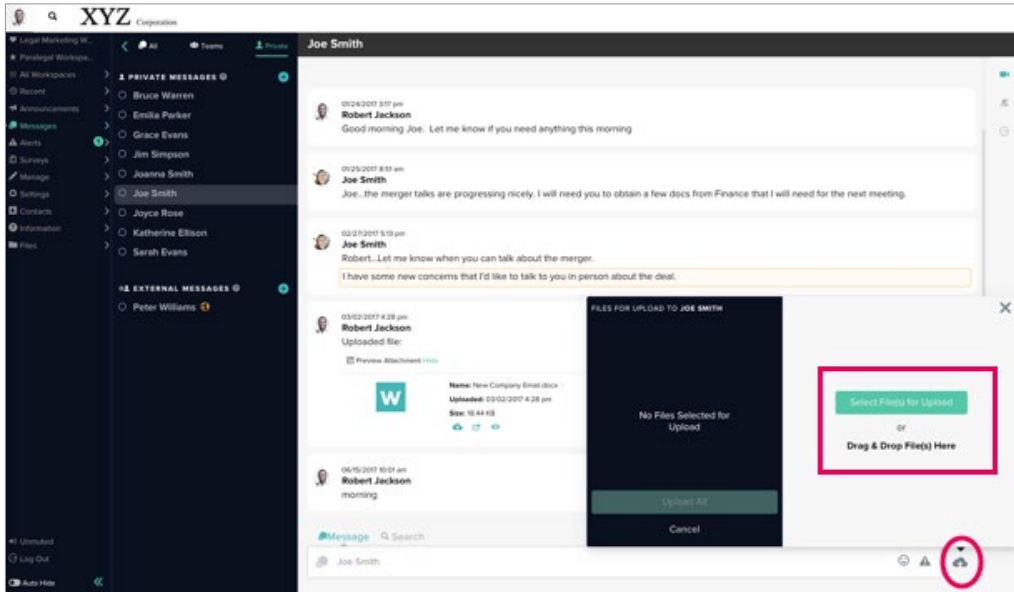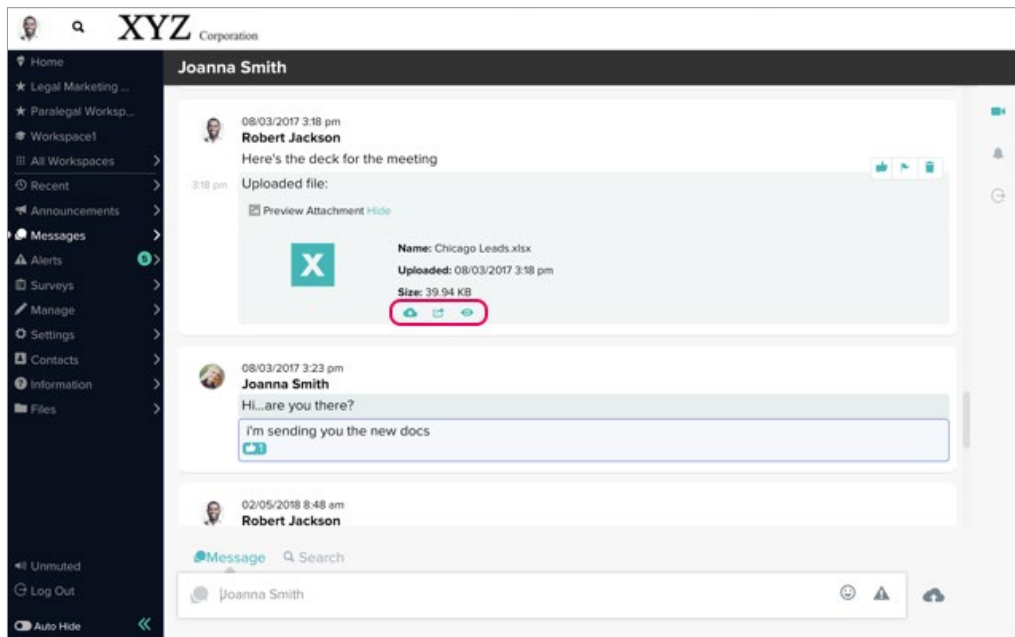

Add a comment to accompany the uploaded file in the provided text box.

Share the file by clicking *Upload Selected File* or *Upload All*, if sharing multiple files.

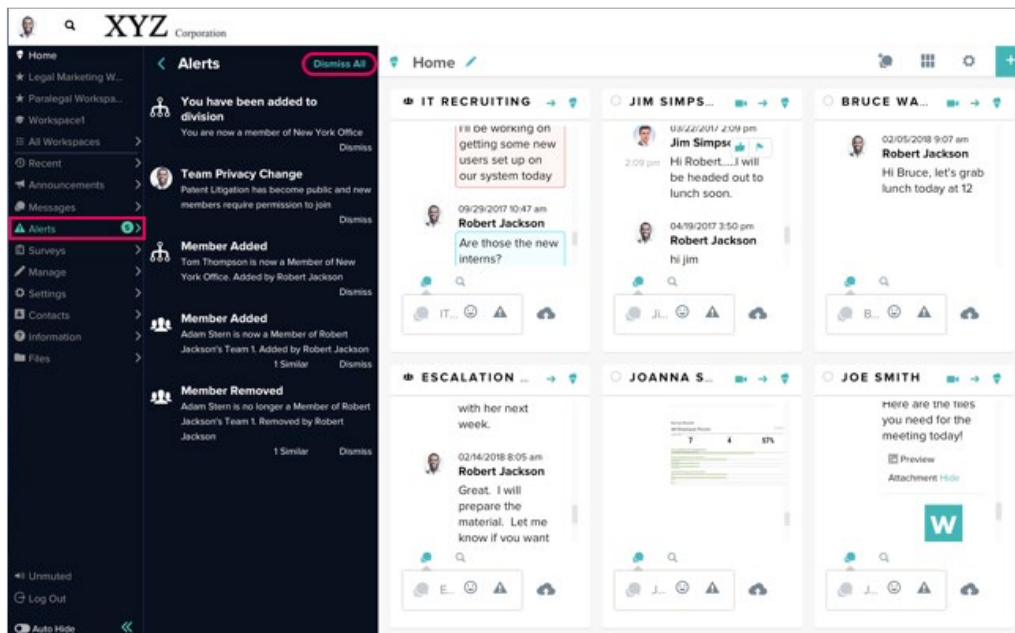Preview 👁 , download ⬇ or reshare ↗ files shared with you.

ALERTS

Alerts ⚠ appear in the left menu when you:

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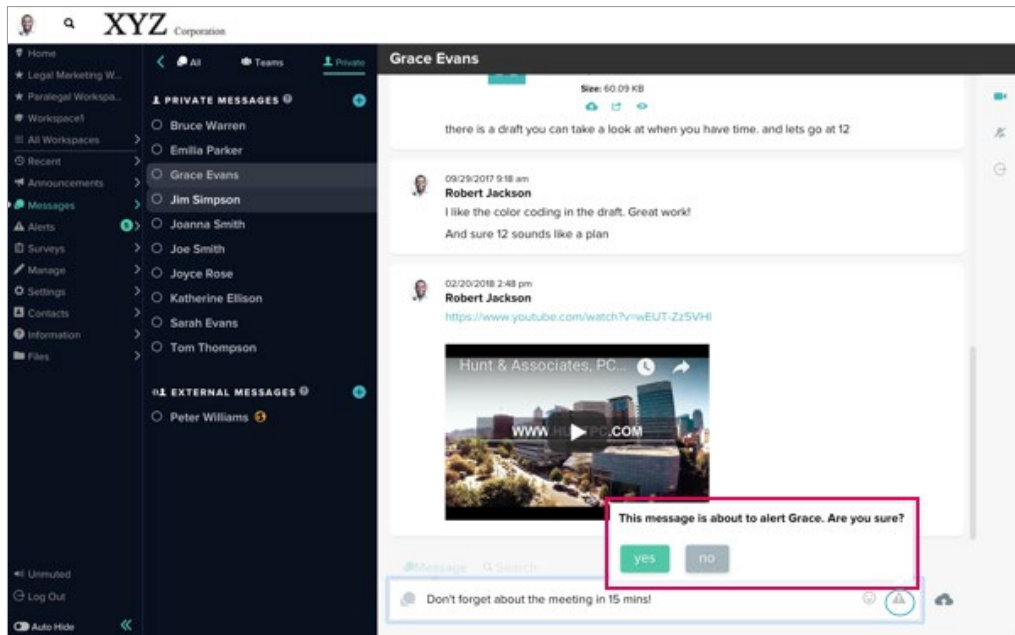- Receive an urgent message
- Receive an @mention in a conversation

Click on an alert to access the message. Dismiss an alert by clicking on Dismiss or select *Dismiss All*.

URGENT MESSAGES

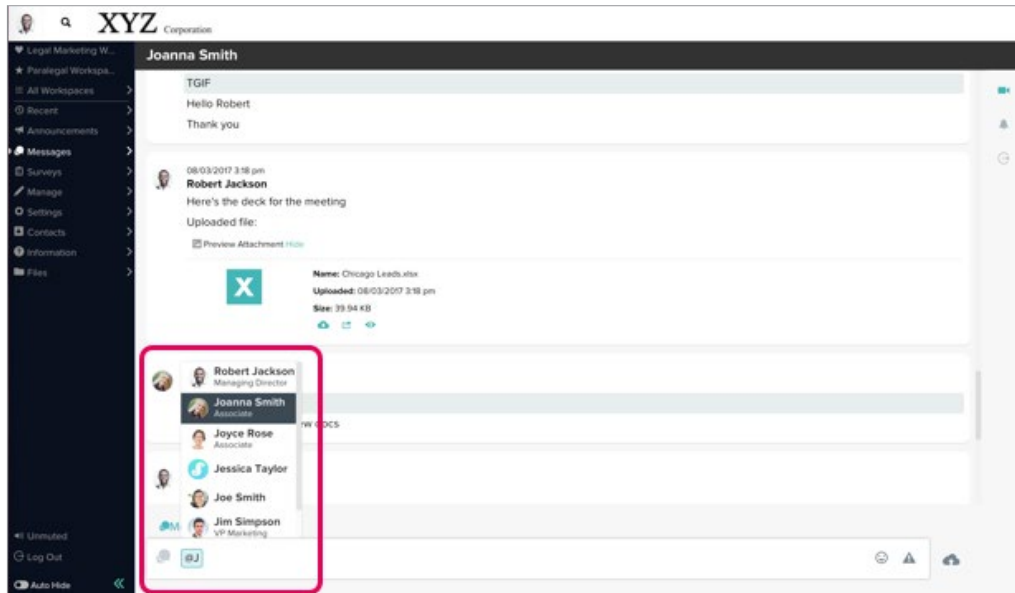Messages sent as urgent trigger an *Alert* to the recipient(s).

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

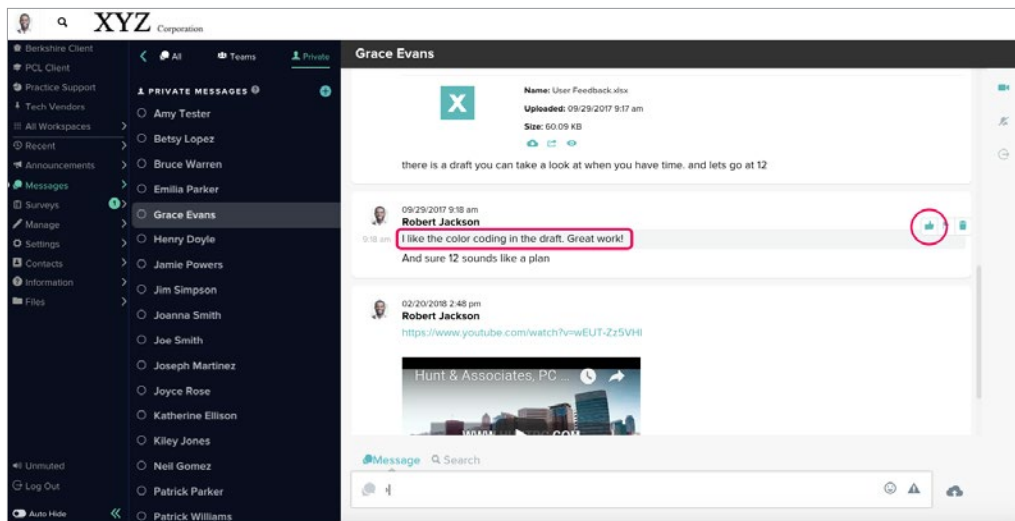# MENTIONS

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.
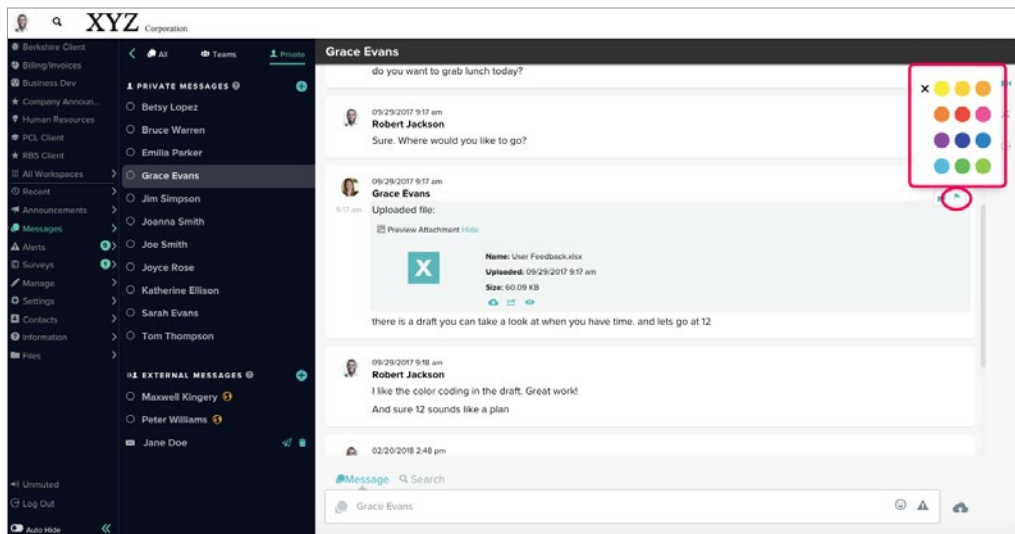

REACTIONS

Show that you like a message by clicking the 👍 icon in the upper right corner.
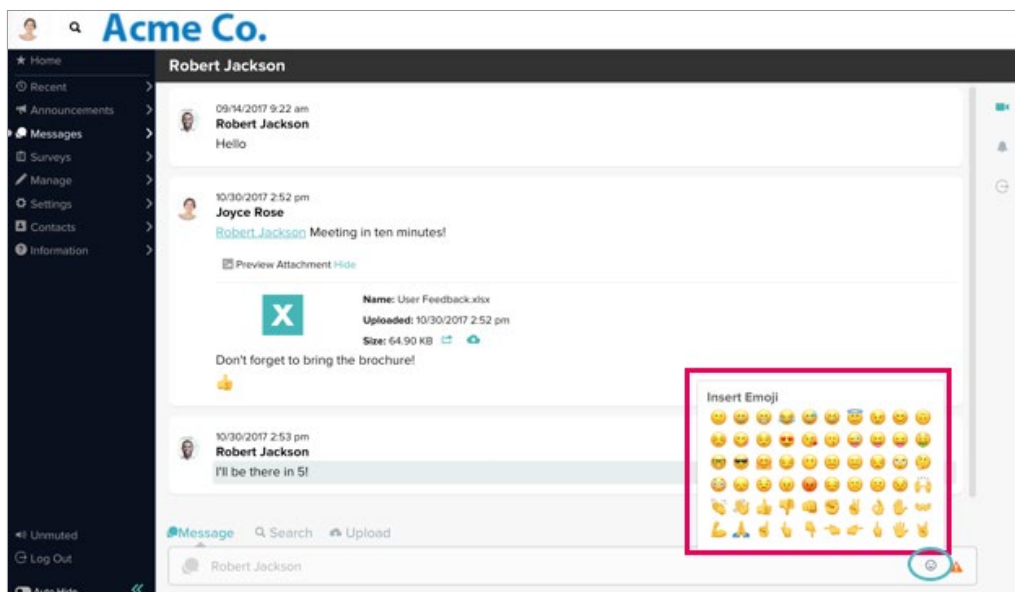
Flag and color-code messages to aid in search by clicking the ⚑ icon in the upper right corner of the message.
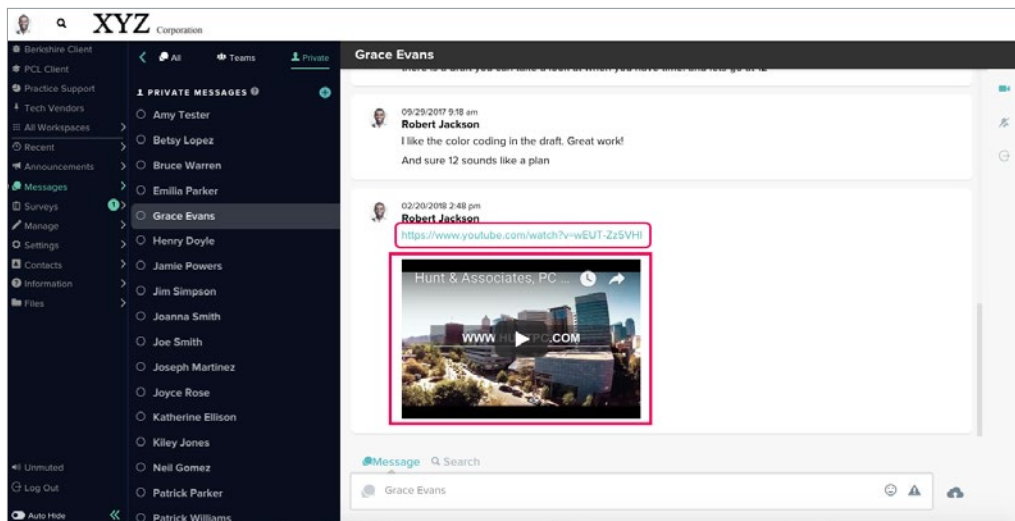

EMOJIS

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.
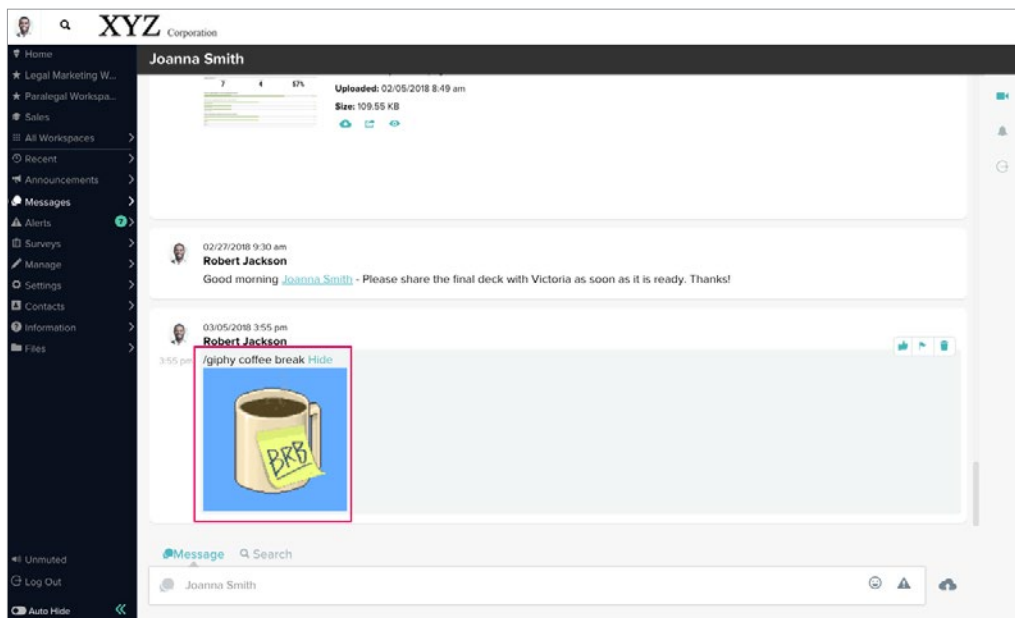
YOUTUBE

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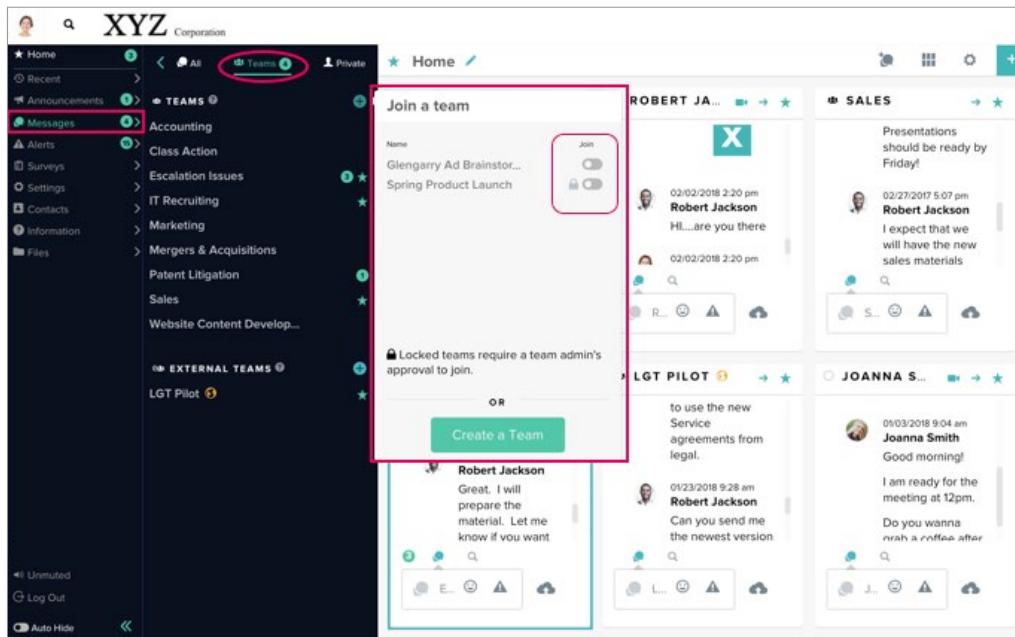

GIPHYs

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*.
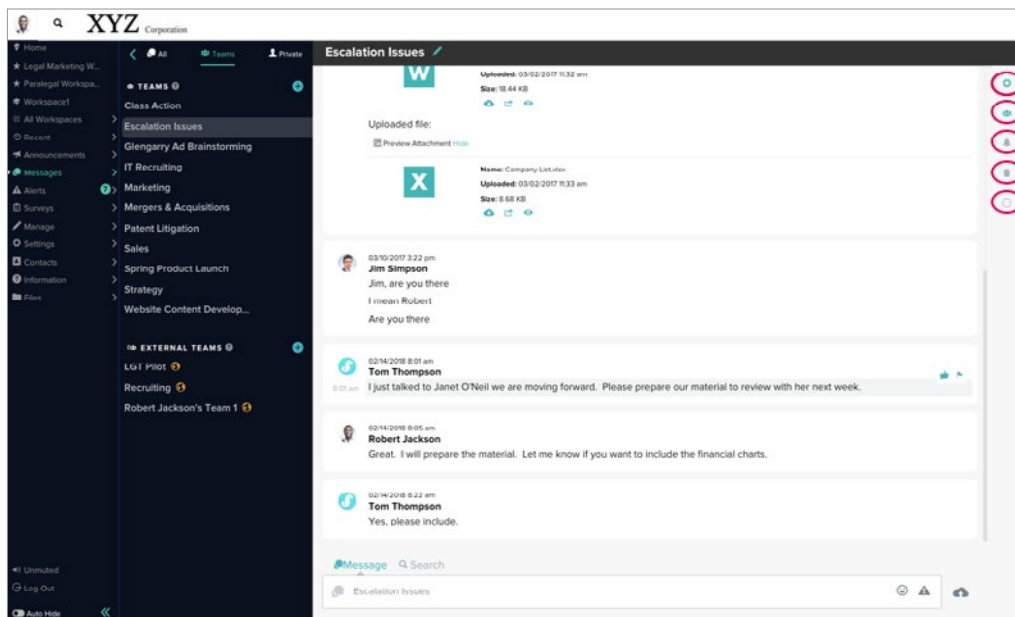
TEAM MESSAGES

Send and receive messages among multiple members by adding teams, using the ⊕ icon.

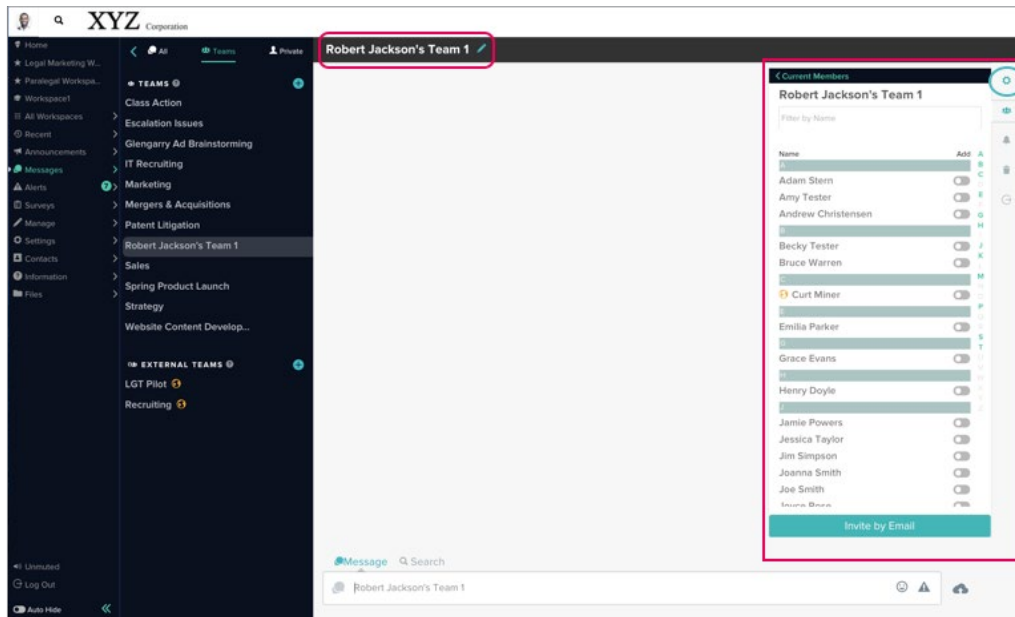Search for and join existing teams, or create a new team.

TEAM ADMIN/CREATOR

Team Admins can designate the team name, its availability in team search, and if membership is open or by approval only.
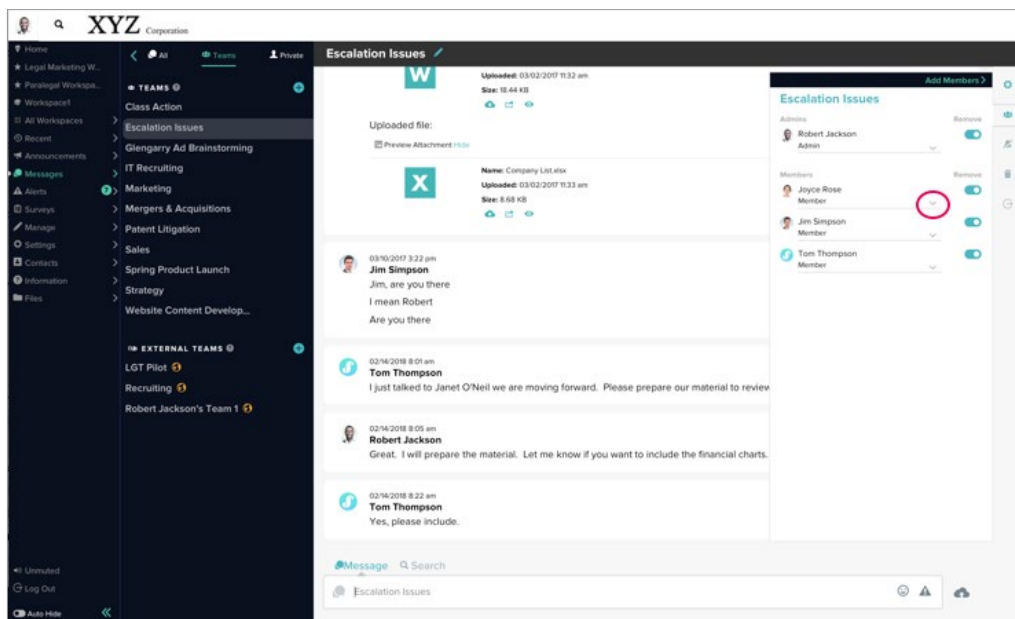
Edit the team name by clicking on the ✏ icon to the right of the Team name in the Team's expanded conversation.

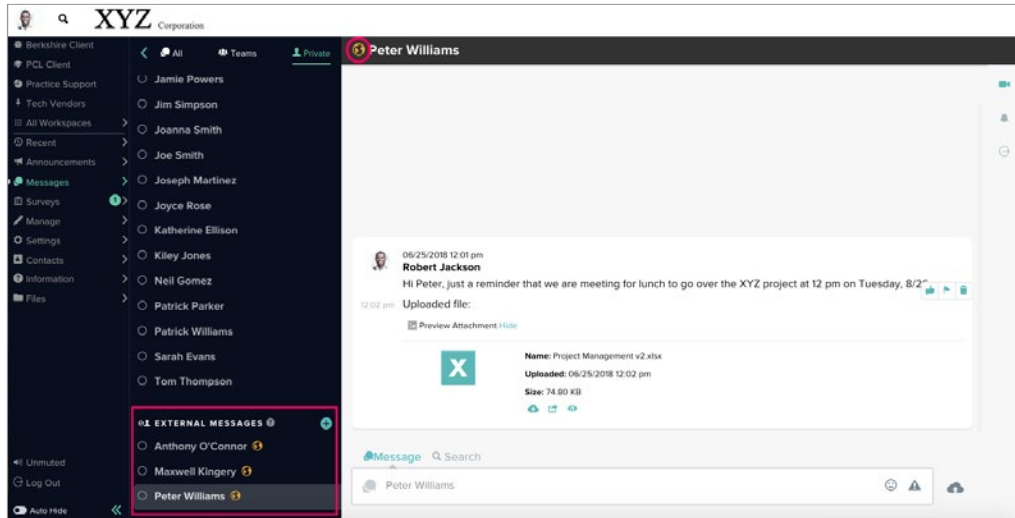Select ⚙ icon to manage settings or delete a team.

Add or remove members using the search bar and 🔘 icon. 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.
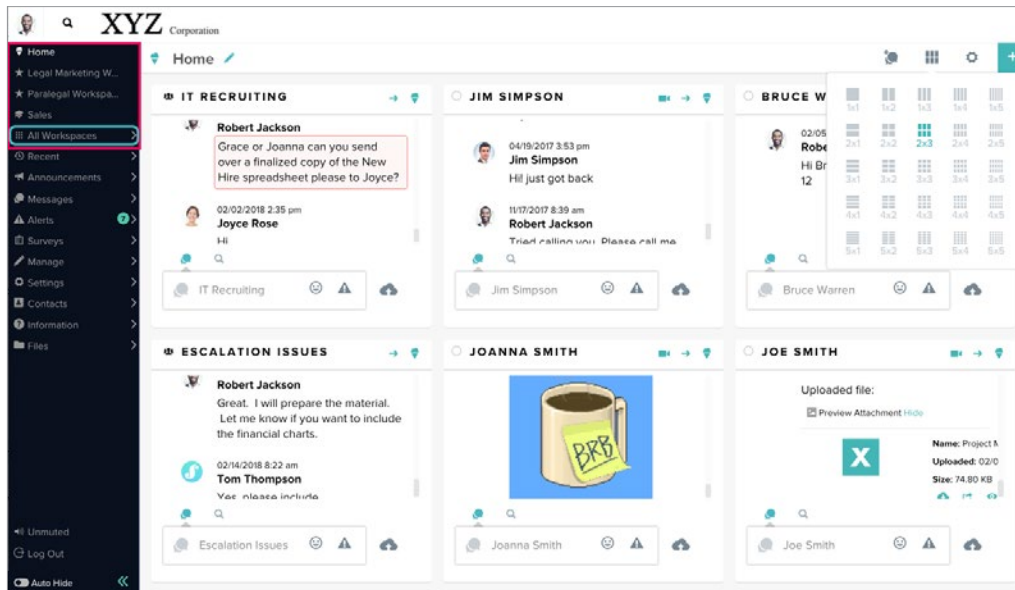
ADDITIONAL FEATURES

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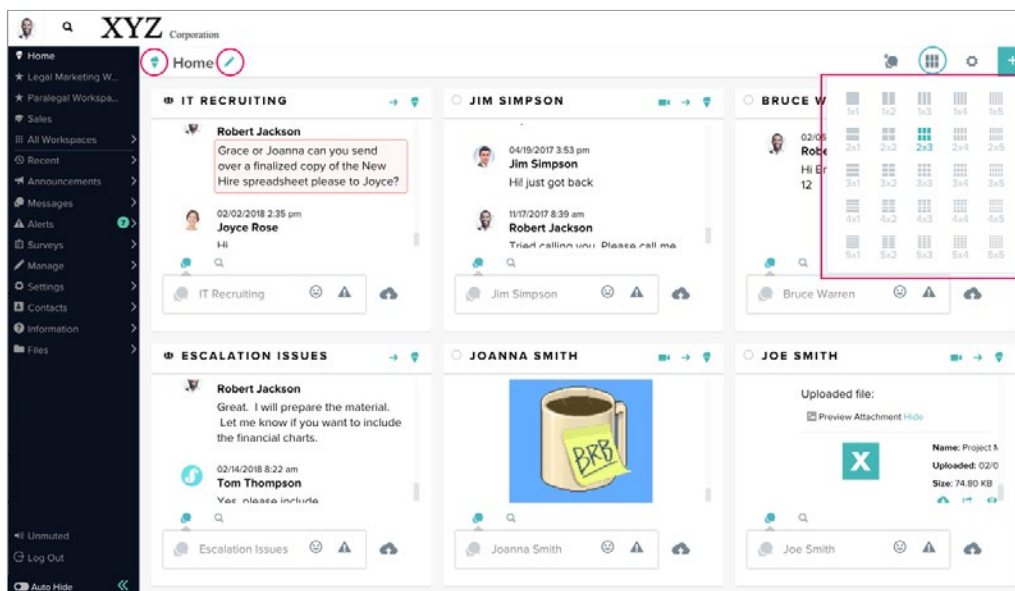
WORKSPACES

Organize related teams and private conversations into **Workspaces** by selecting the ⊞ icon near the top of the left menu.
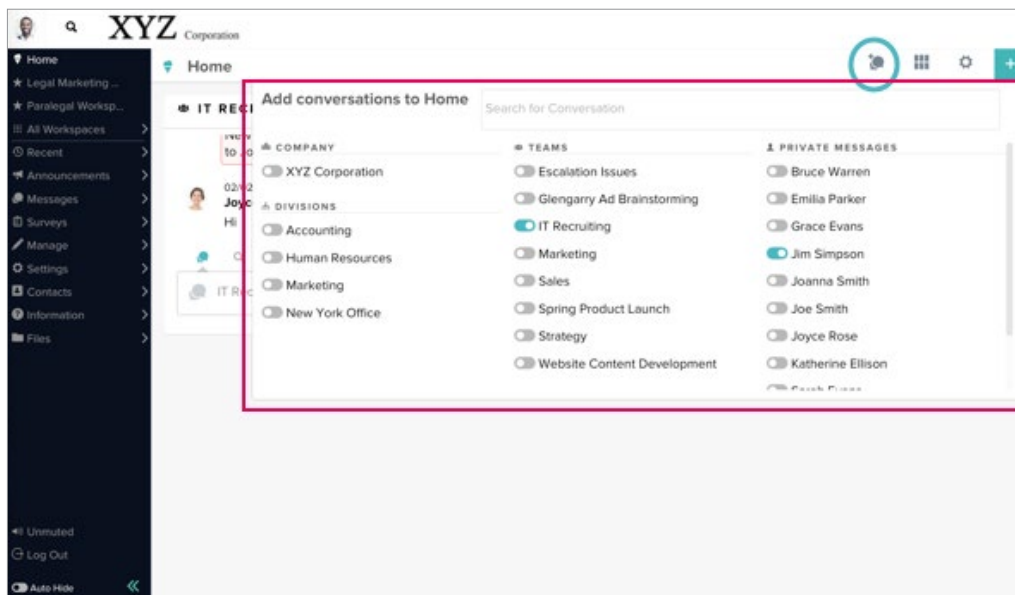

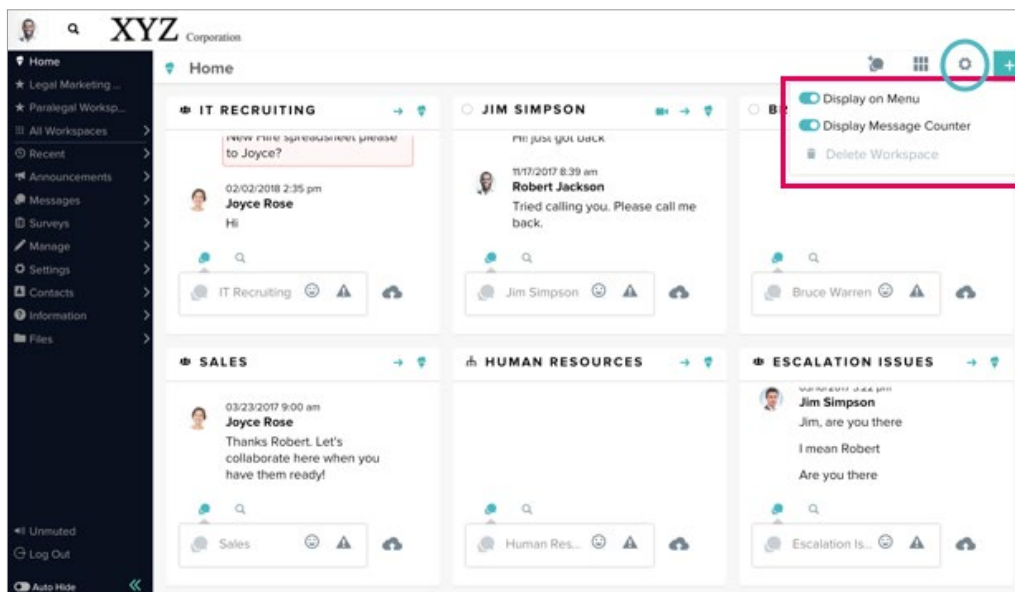Name each workspace and assign an icon at the top left of the workspace window.

Choose a layout for each workspace to easily view multiple conversations

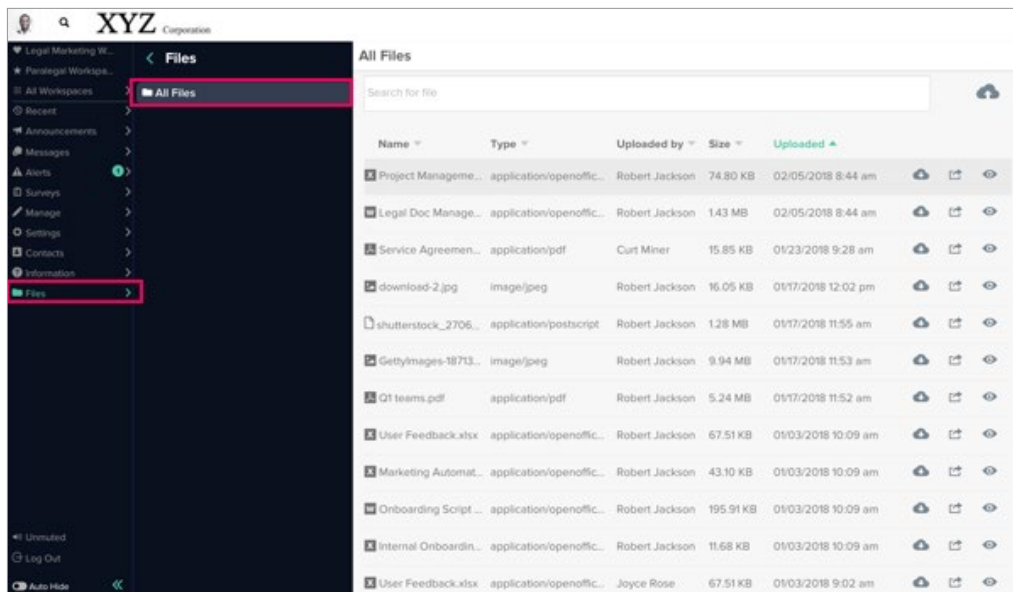Add, drag, drop and rearrange conversations within a workspace.

Use the ⚙ icon to add or delete workspaces as needed, as well as organize and prioritize your workspace notifications in the left menu.

FILE MANAGEMENT

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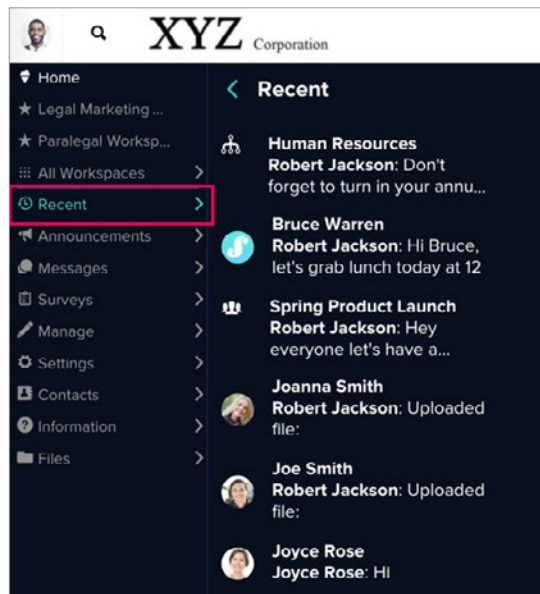

ANNOUNCEMENTS

Access company-wide and Division announcements by selecting **Announcements** in the left menu.

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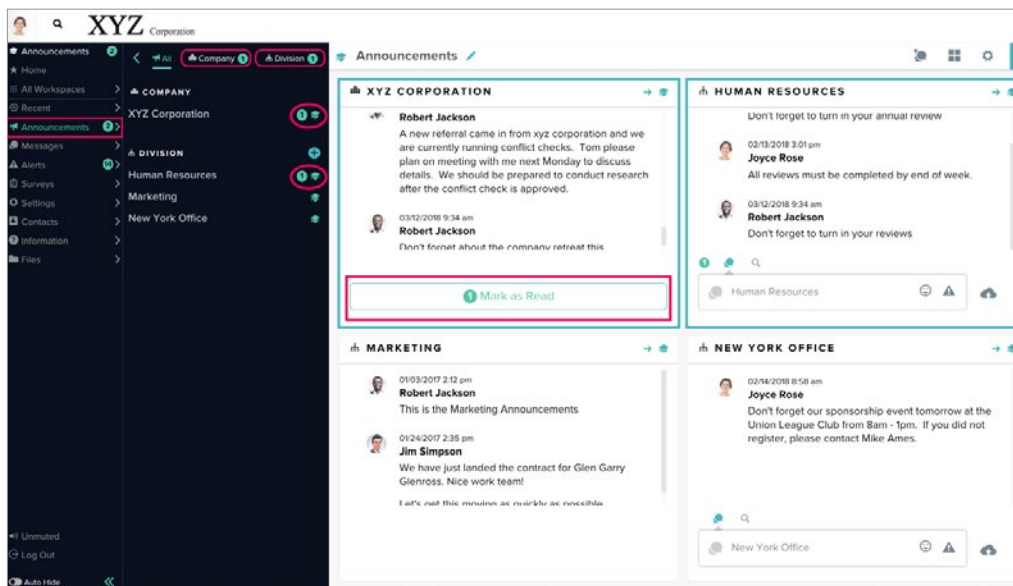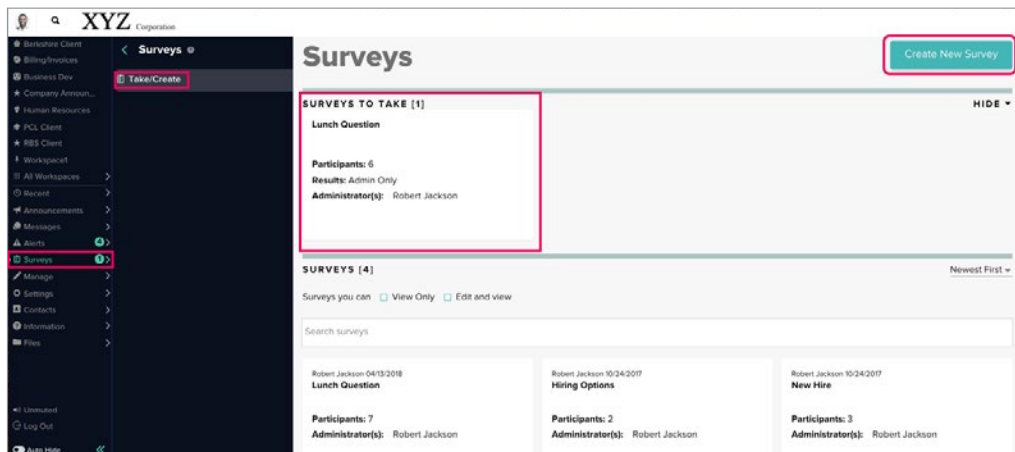
RECENT

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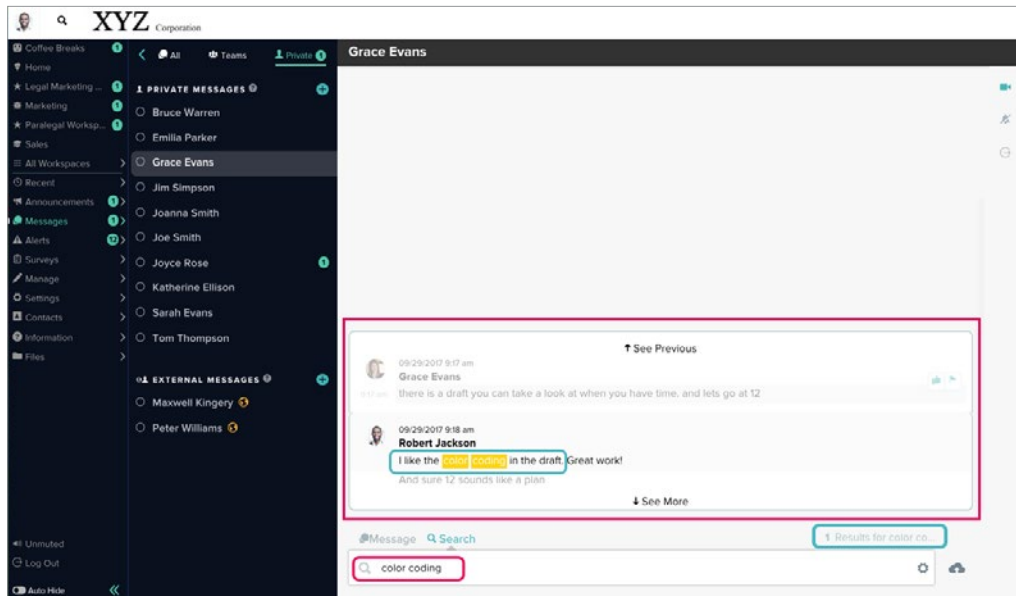

SURVEYS

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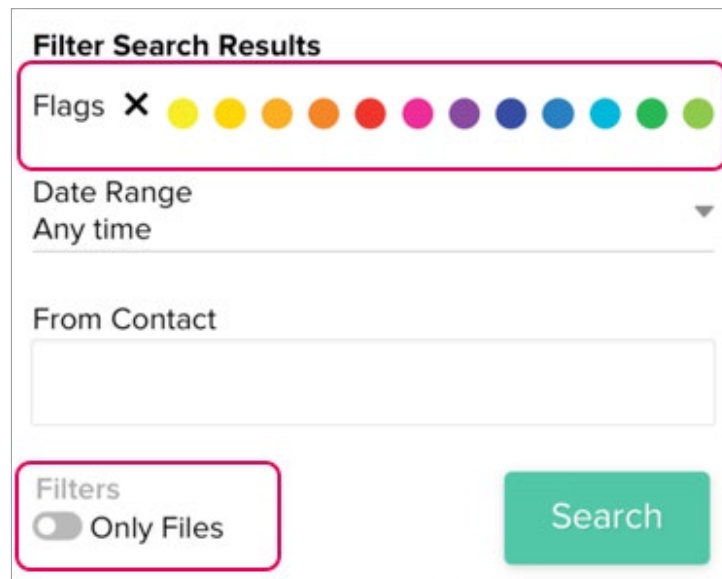
SEARCH

Search for keywords within a conversation by clicking 🔍 *Search* above the message box. Refine the search by selecting the ⚙ icon on the right side of the search box for more advanced options.
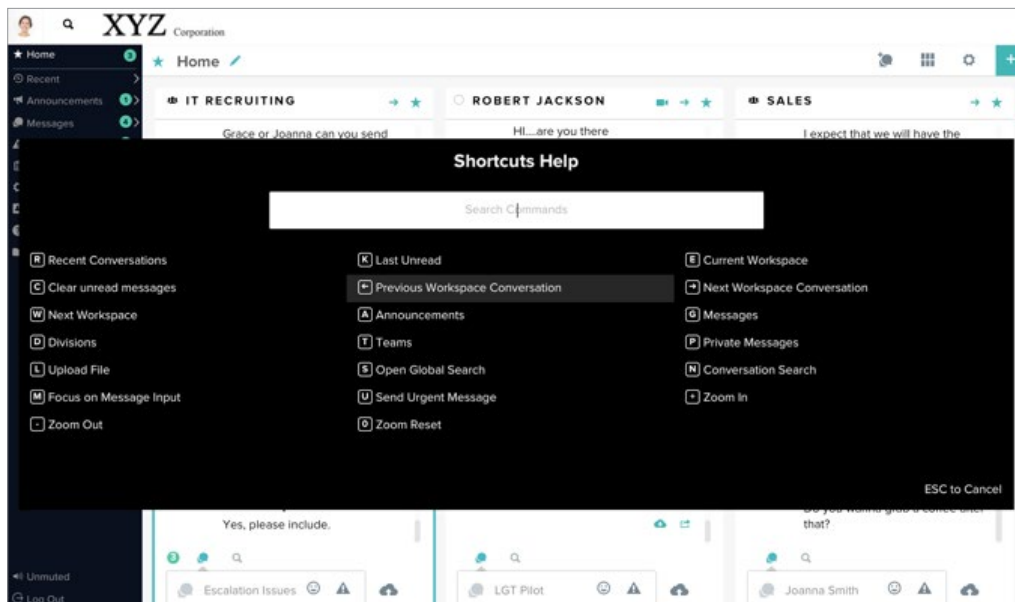

Conduct a global search for keywords across all conversations by clicking 🔍 *Search* in the upper left corner of your Workstorm window.
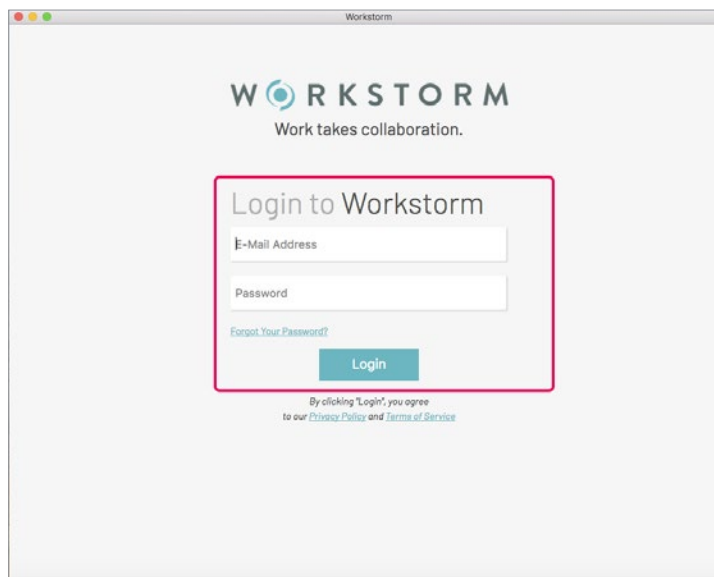
KEYBOARD SHORTCUTS

Access keyboard shortcuts by holding *Command* or *Control* + K on your keyboard. Access more shortcuts by holding *Command* or *Control* + K + H.
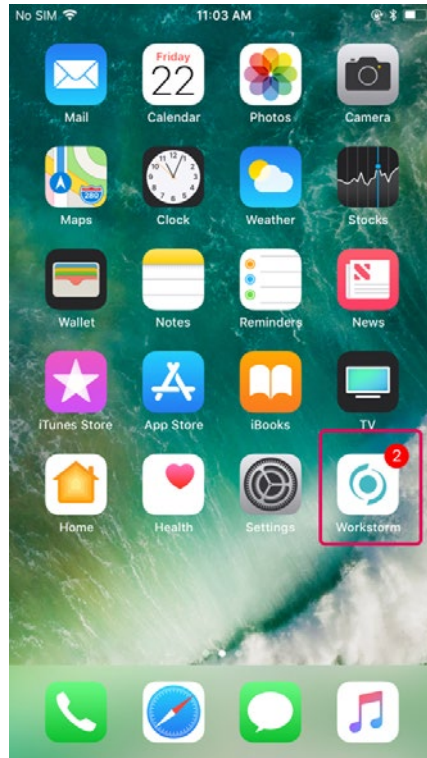

DESKTOP APP

Access Workstorm via the desktop app for Mac and Windows. App users neither require a compatible browser to access Workstorm, nor the WebRTC plugin for video calls.

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.