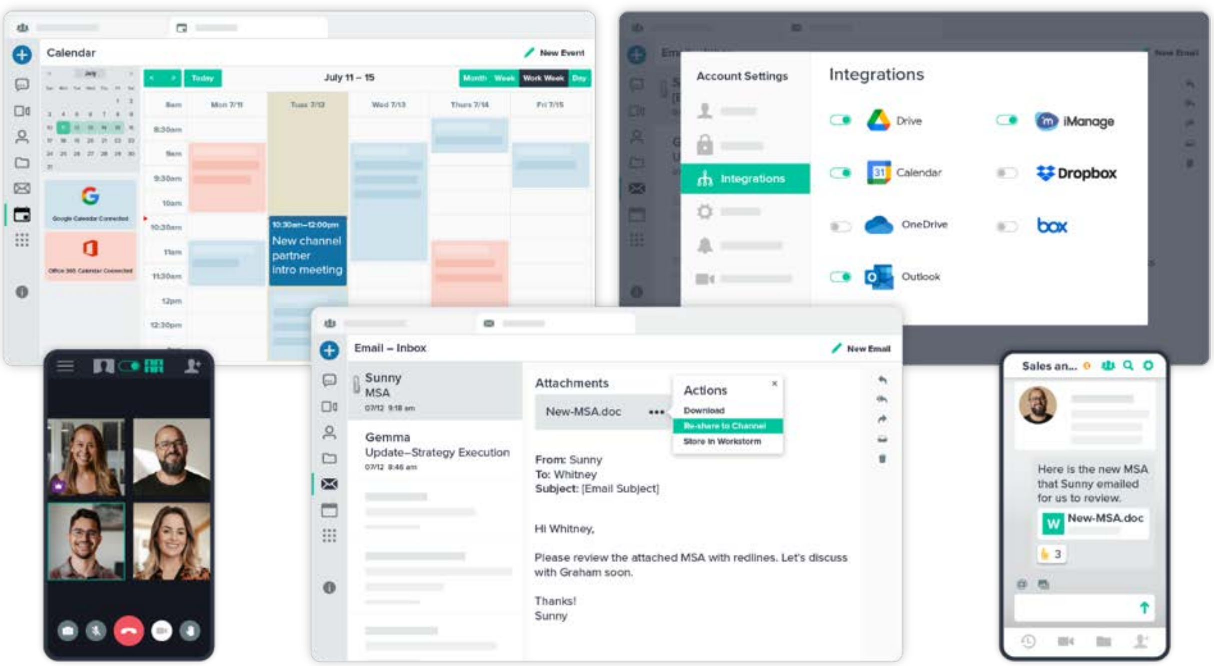
WORKSTORM

End User Guide



Version 2-21-25

User Guide

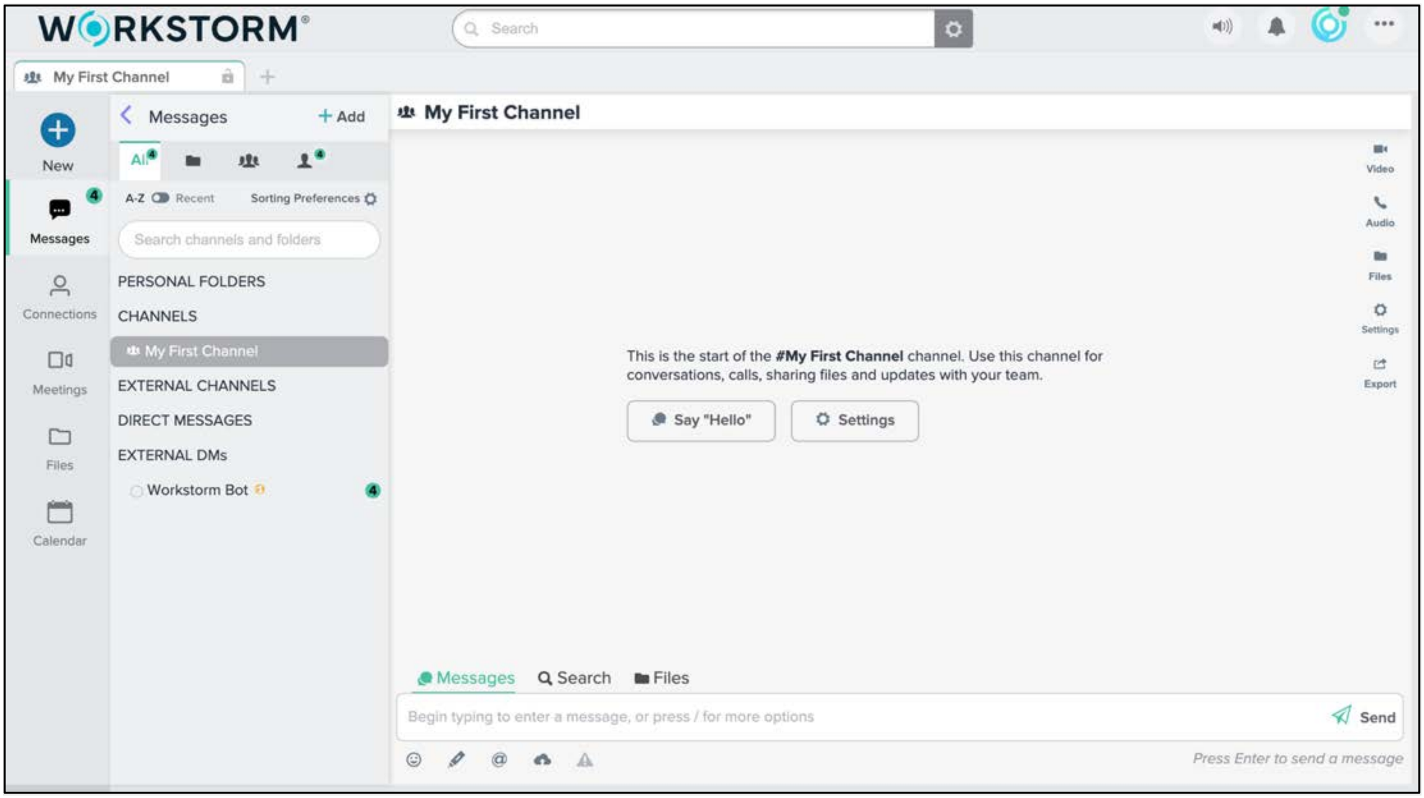
ACCOUNT SETUP

[Sign up for Workstorm](https://) 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.

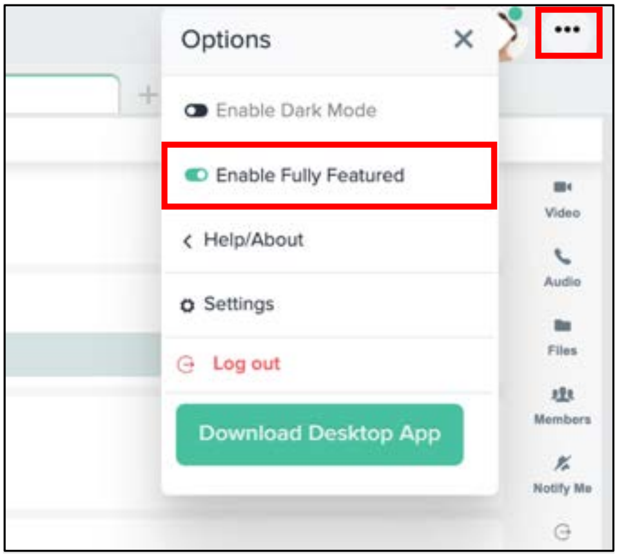
For additional knowledge-based articles and video tutorials, visit helpdesk.workstorm.com.

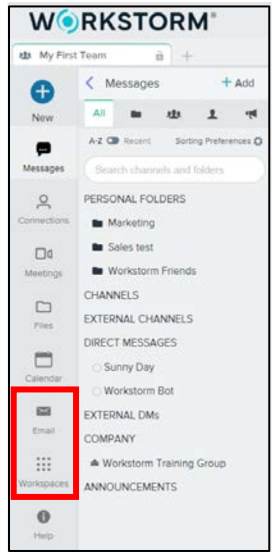
Overview

When logging in to Workstorm for the first time, you will see the following screen. By default, Workstorm presents users with *Essential View*. This mode displays *Messages*, *Connections*, *Meetings*, *Files*, and *Calendar* in the left sidebar.

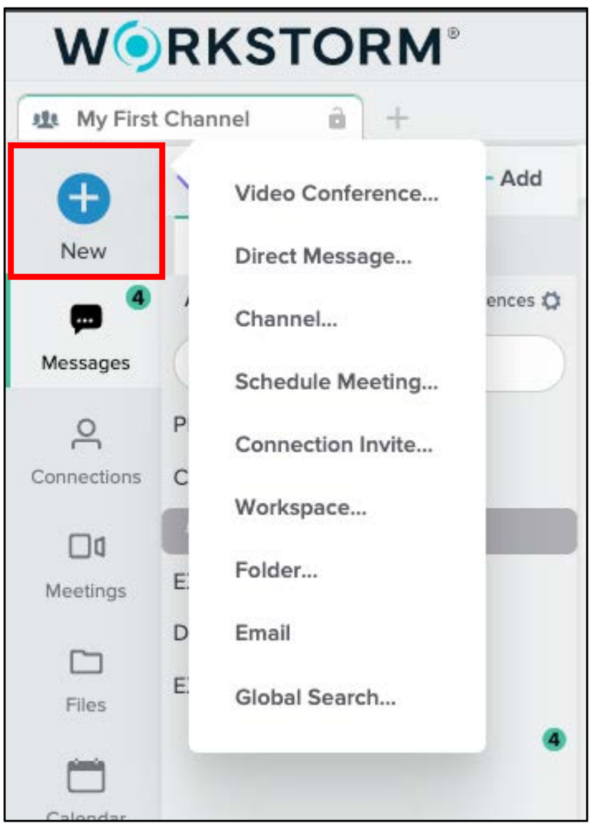


To add *Email* and *Workspaces* to your left sidebar, enable *Fully Featured* view, select the **ellipsis •••** button in the upper right-hand corner and toggle on *Enable Fully Featured*



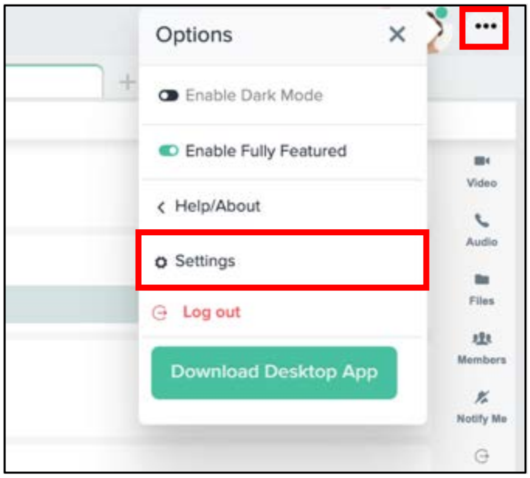


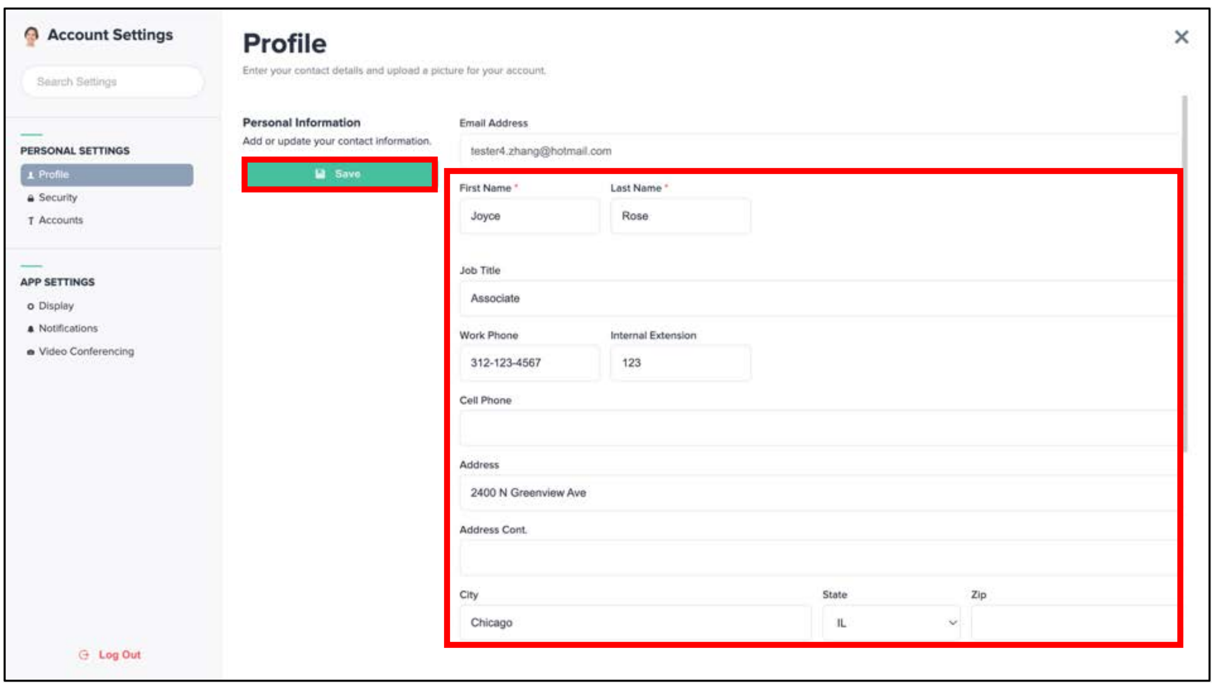
At the top of the sidebar is the blue **New+** button, where you can easily access different features.

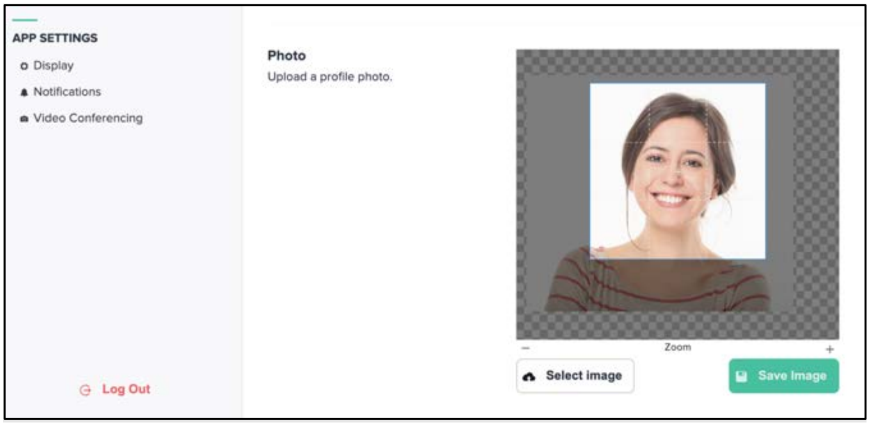


Profile

- Select the **ellipsis •••** button in the upper right-hand corner
- Click *Settings* to open the *Profile* section, where you can customize your profile information and add a profile photo

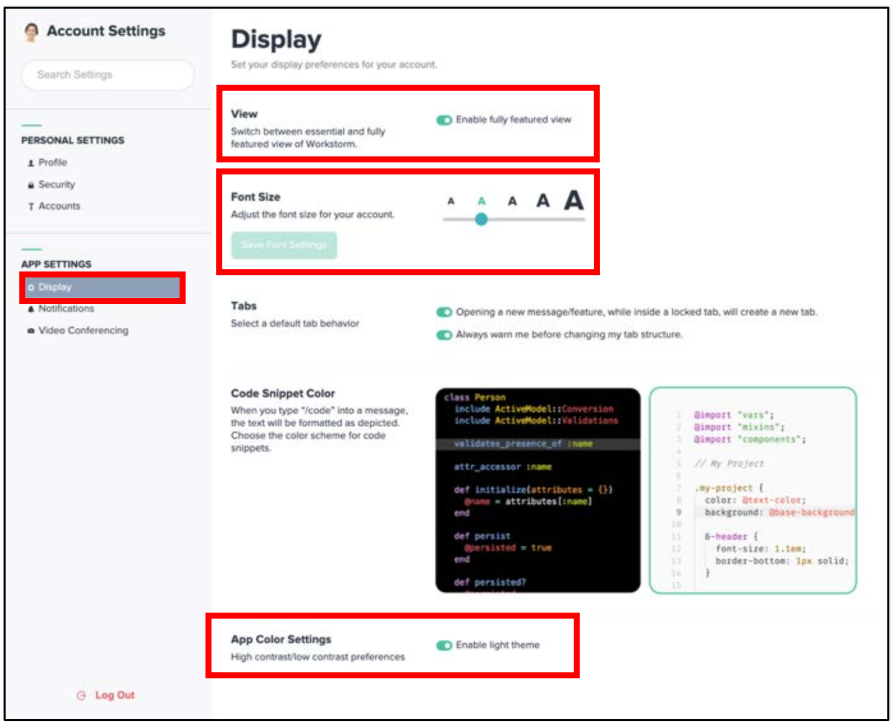






Display

- Click on *Display* from the left sidebar to toggle between *essential* view and *fully featured* view
- Adjust font size and pick a color theme based on your preferences



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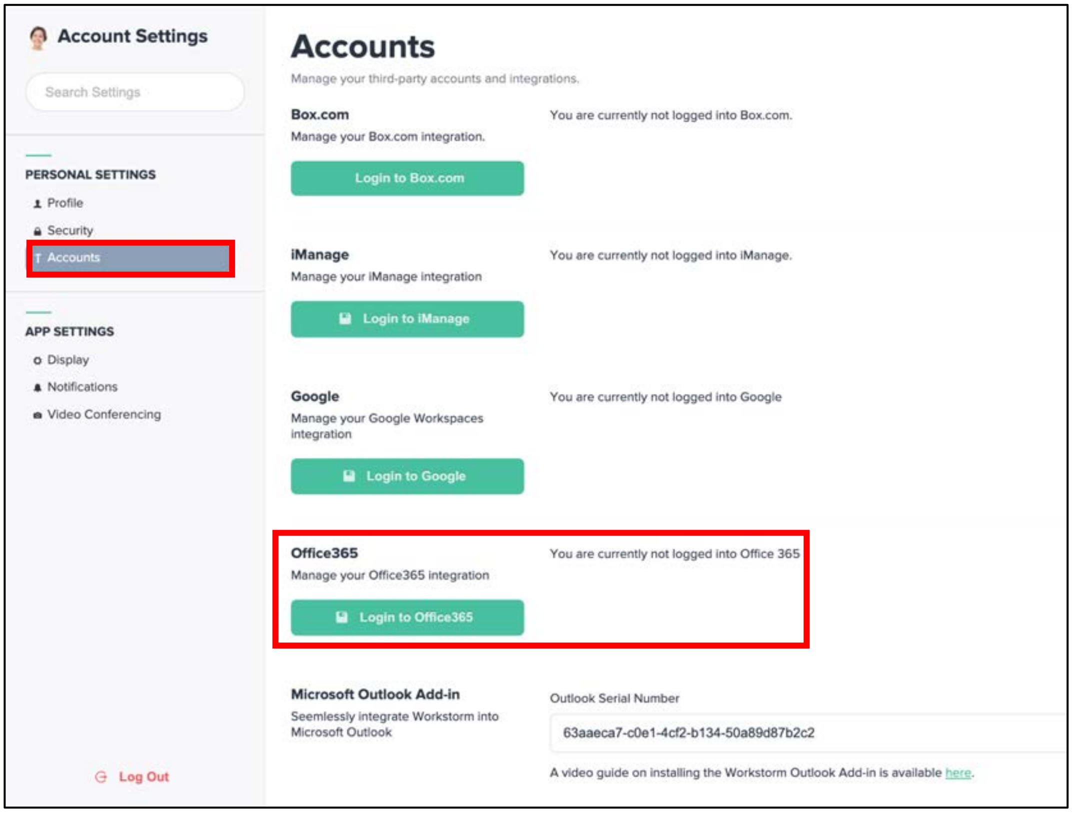
Connect Microsoft 365

If your organization uses Microsoft 365, you can connect your email and calendar to access both within Workstorm.

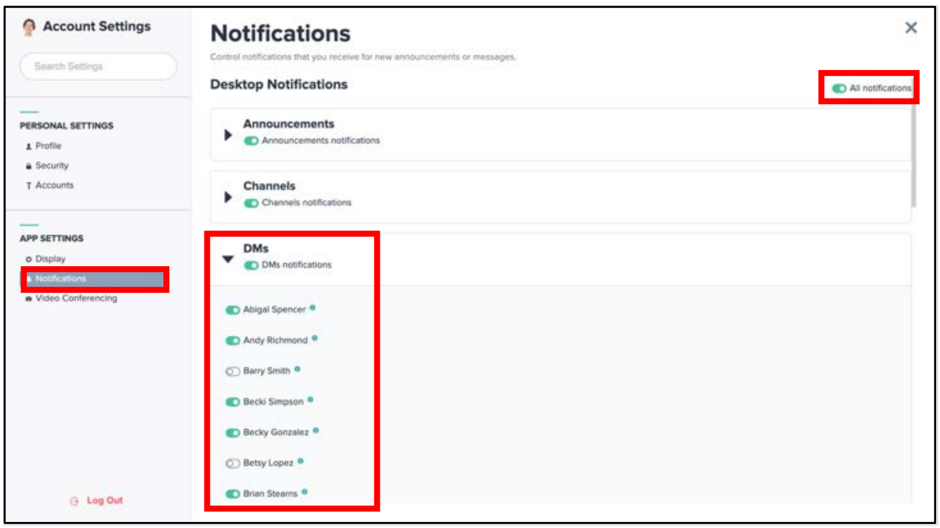
- In *Settings*, click on *Accounts* from the left sidebar to manage third-party accounts and integrations
- Scroll down and click the green **Login to Office365** button to login to your *Calendar*, *Email* and *OneDrive* on Workstorm



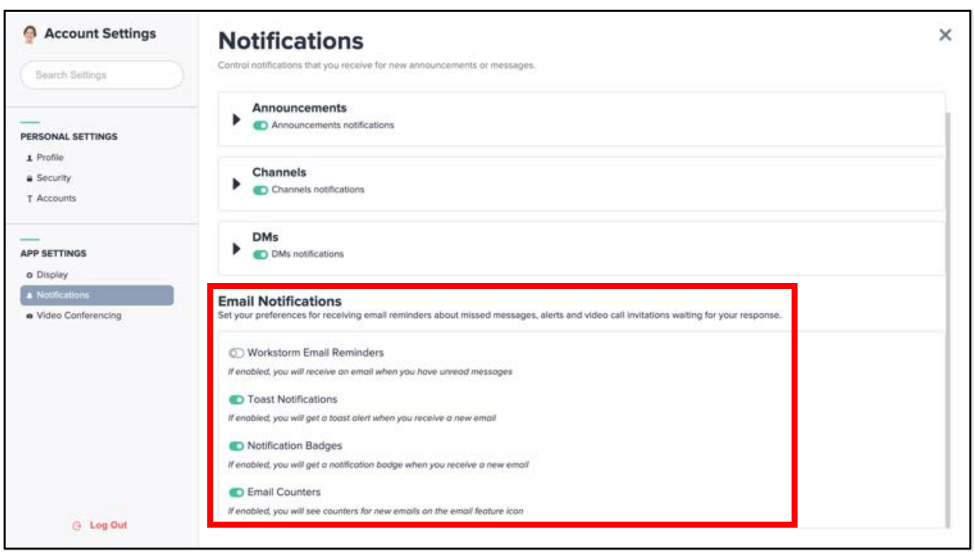
Notifications

- In *Settings*, click on *Notifications* in the left sidebar and toggle *All Notifications* to enable or disable push notifications for all incoming messages, alerts, and video calls
- Click on the toggles next to each dropdown to enable or disable notifications for each conversation type
- Click on the dropdowns to customize notification preferences for specific conversations

NOTE: Enabling notifications is recommended to help you never miss a message.



After you're signed in with your email on Workstorm, you can customize what type of notifications you receive for new incoming emails. Email reminders for missed messages are enabled by default, but they can be disabled here.

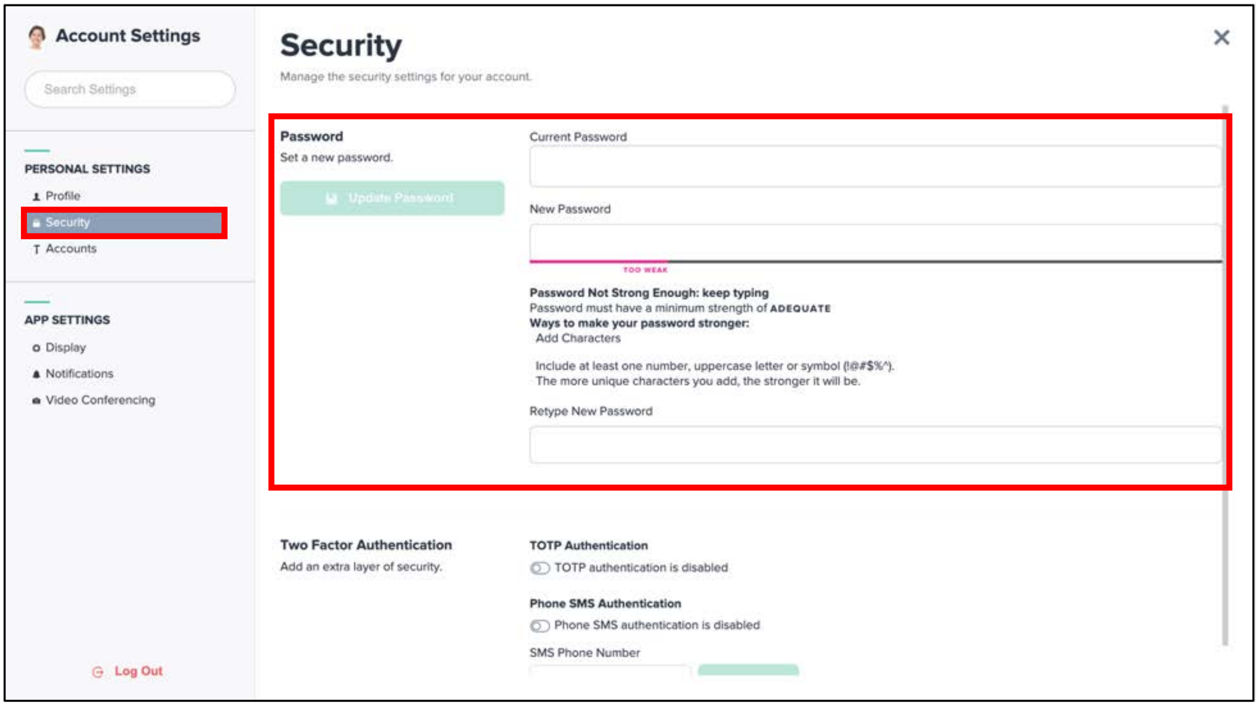


SECURITY

Go to **Settings** and select **Security** from the left sidebar to manage the security settings for your account.

Password Reset

Update your password regularly for security and to comply with password requirements set by your company.

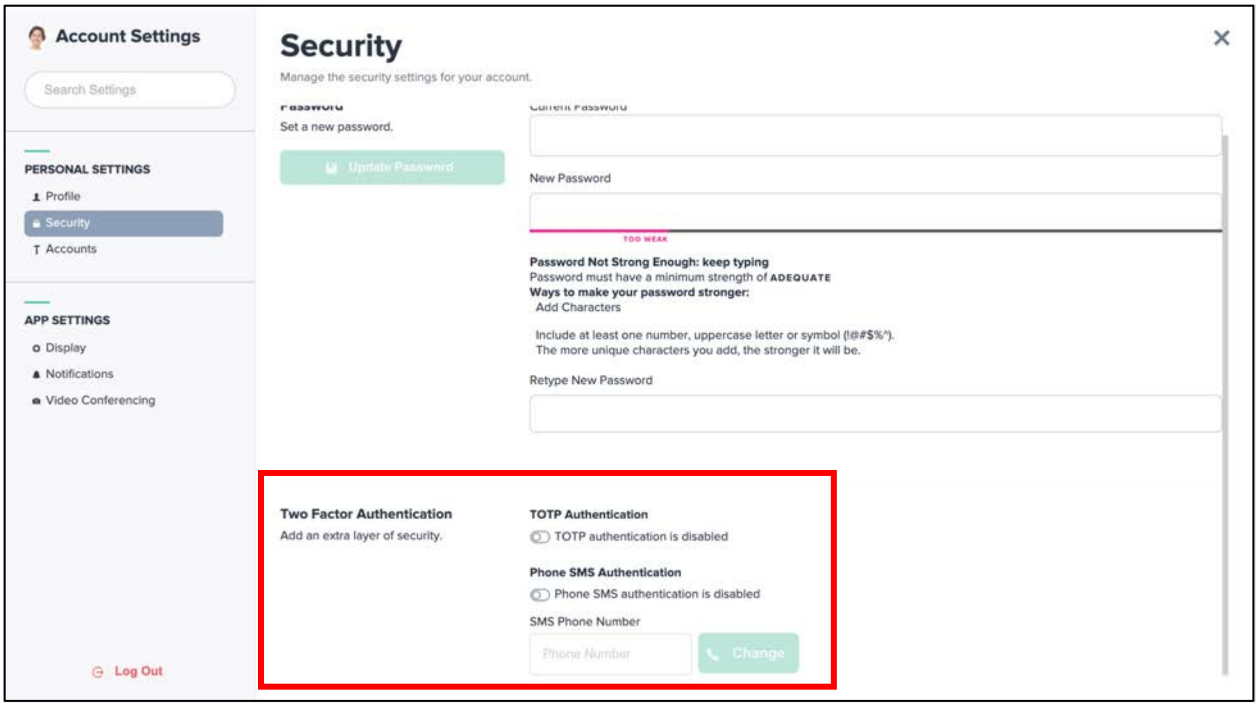


Two-Factor Authentication (2FA) Set up

If your Company Admin has already enabled company-wide 2FA, then you will be prompted to set up 2FA when you log in for the first time.

If your Company Admin has not enabled companywide 2FA, then you can add extra security to your account by enabling 2FA:

1. Toggle on TOTP if you would like to use the Google Authenticator App for 2FA
2. If you would like to receive SMS texts with the 2FA code to your phone, toggle on Phone SMS
3. After toggling on either option, you will be walked through the respective 2FA set up process



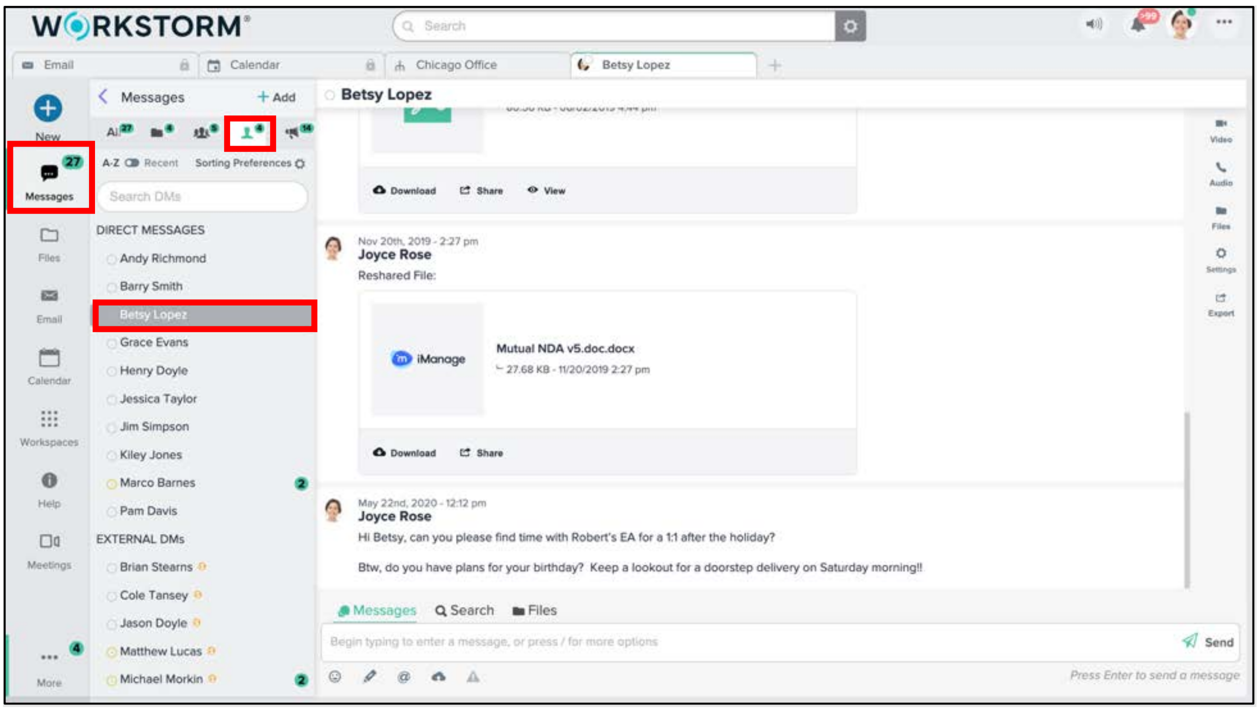
MESSAGING

Send *Direct* or *Channel Messages*, share files, host *Video Conferences* and more, all within the same secure platform.

Direct Messages

Direct Messages (DMs) are one-on-one conversations involving two colleagues. No other members can be added to these conversations.

- To access your *DMs*, select the **Messages** icon from the left sidebar
- Click the **Direct Messages** icon in the left menu to see all your existing one-on-one conversations
- Click on a name to open that conversation with them



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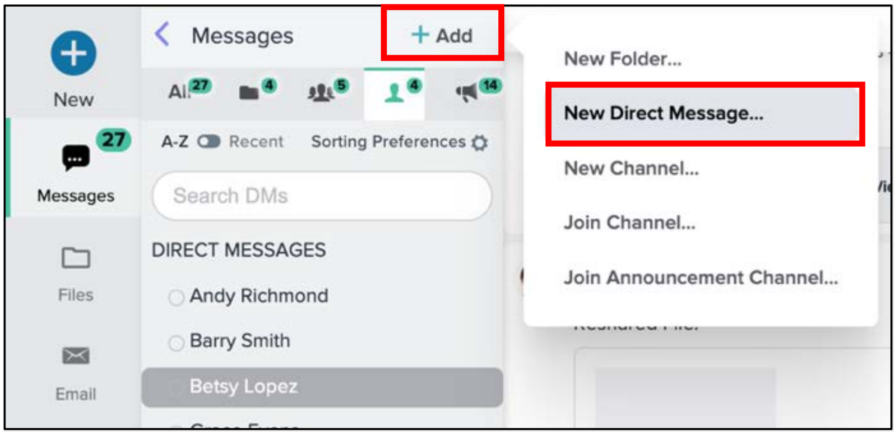
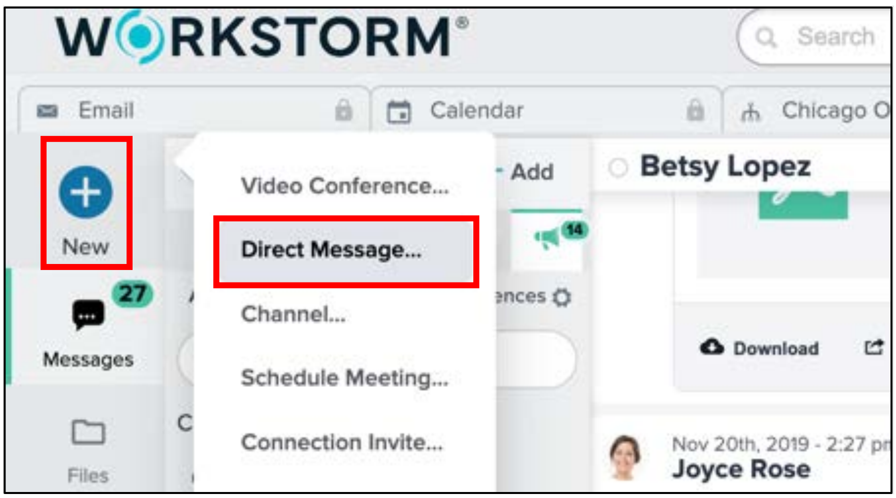
There are two ways to start a Direct Message:

- (1) Select the **+Add** button and choose **New Direct Message**



- (2) Select the blue **New+** button at the top of your left sidebar, then **Direct Message**



To add a Connection to a Direct Message:

1. In the *New DM* window, type a name in the search bar to find a colleague to start a conversation with and click the green **Start DM** button
2. Type a message in the bottom message box, and either press Enter on your keyboard or click the green **Send** icon to send your message

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.

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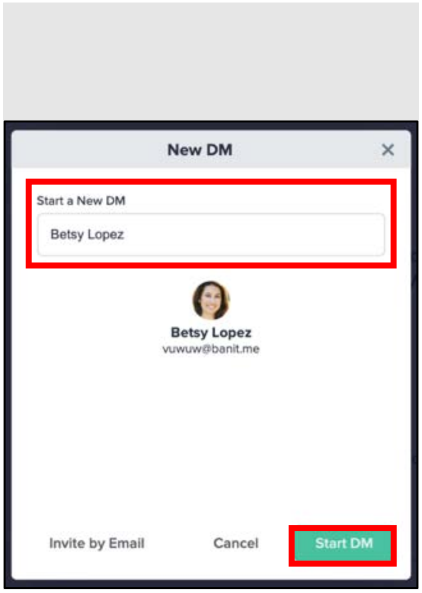
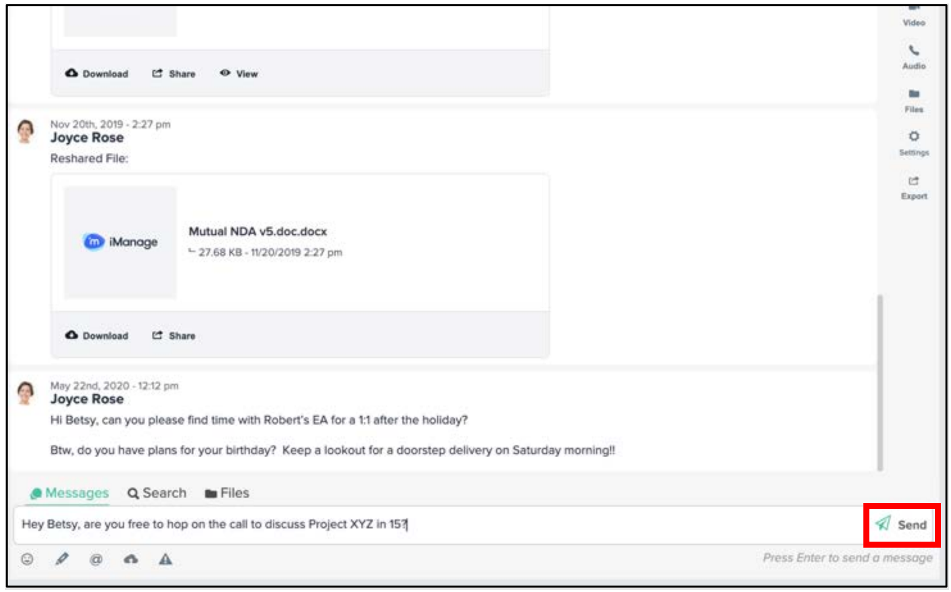


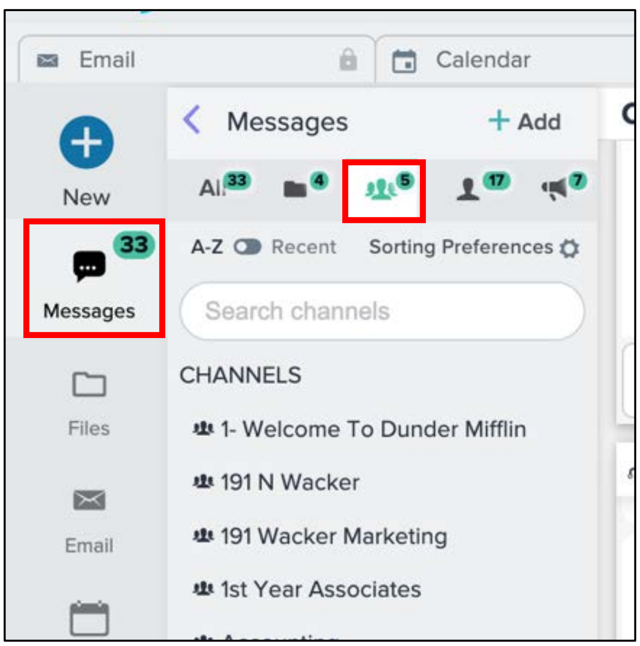


Channels

A Channel is a conversation involving two or more colleagues that can grow larger or smaller as needed.

To access a Channel:

1. Select the **Messages** icon in the left sidebar
2. In the Messages sidebar, click the **Channels** icon to see all your existing channels



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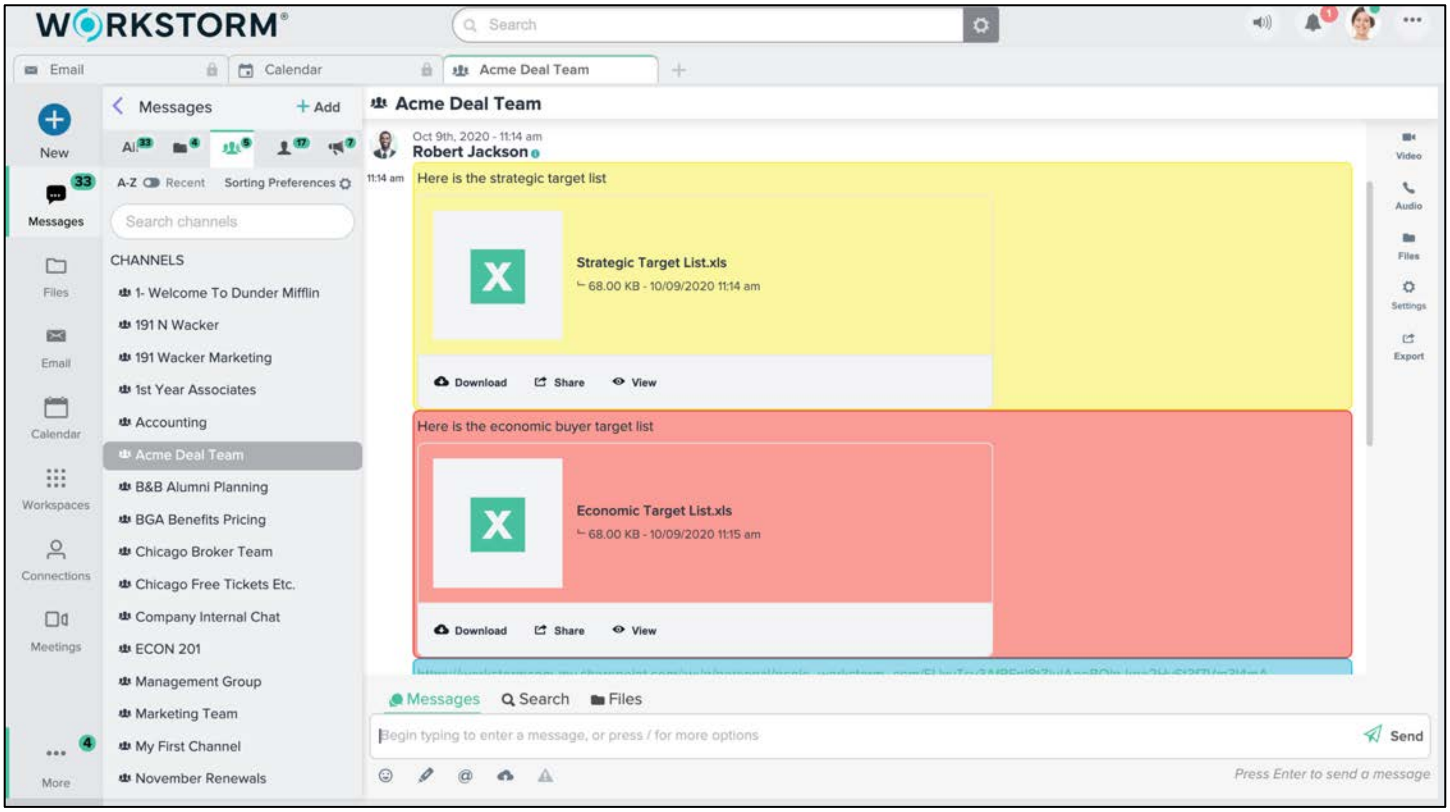
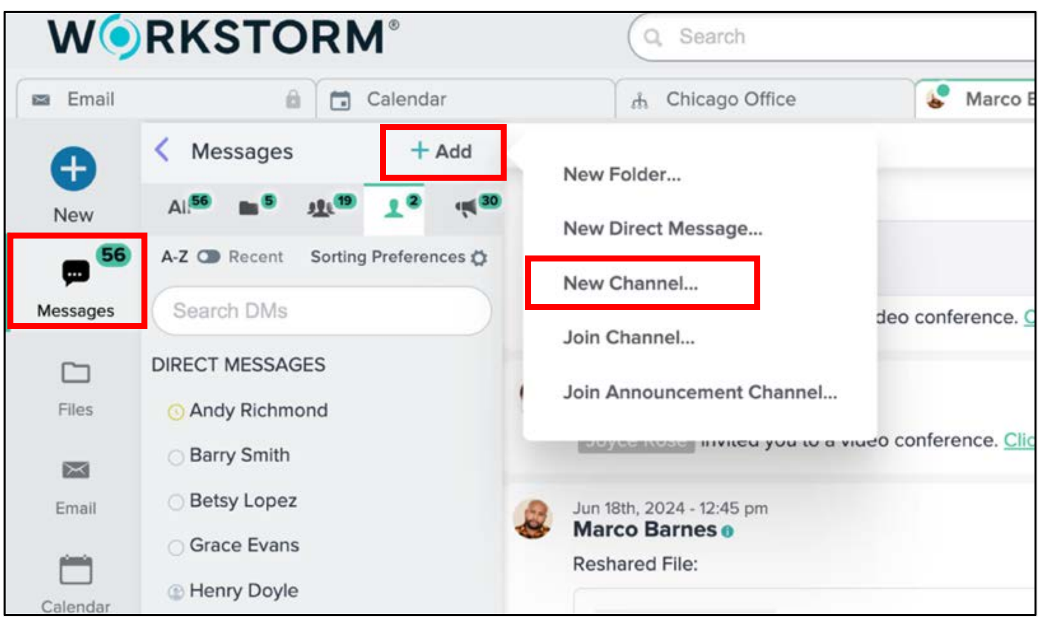
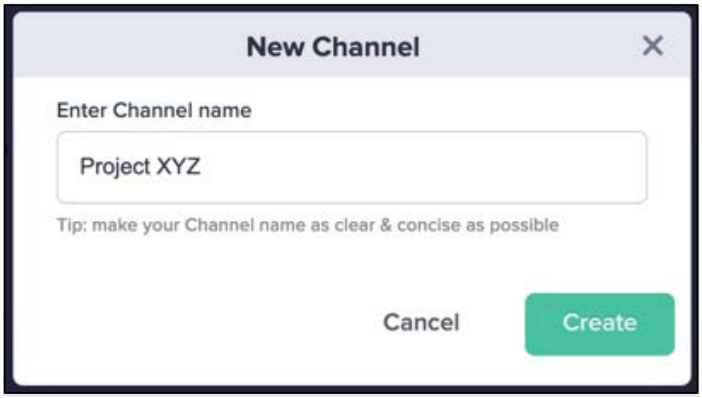
3. Click on a *Channel* to open that conversation

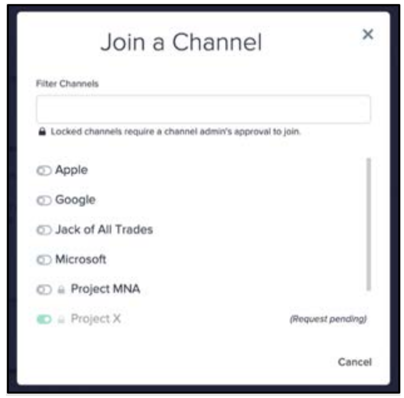


There are two ways to create a Channel:

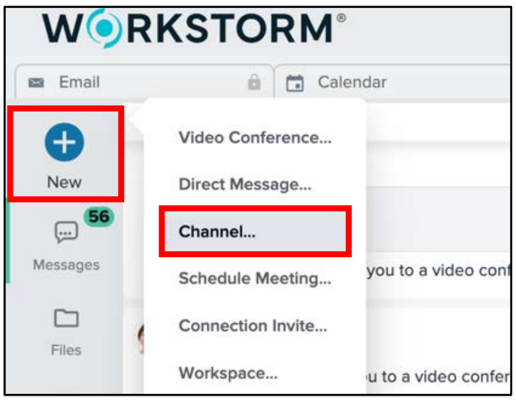
- Select the **+Add** button and choose **New Channel**, or choose **Join Channel** to see a list of existing channels that you can join.





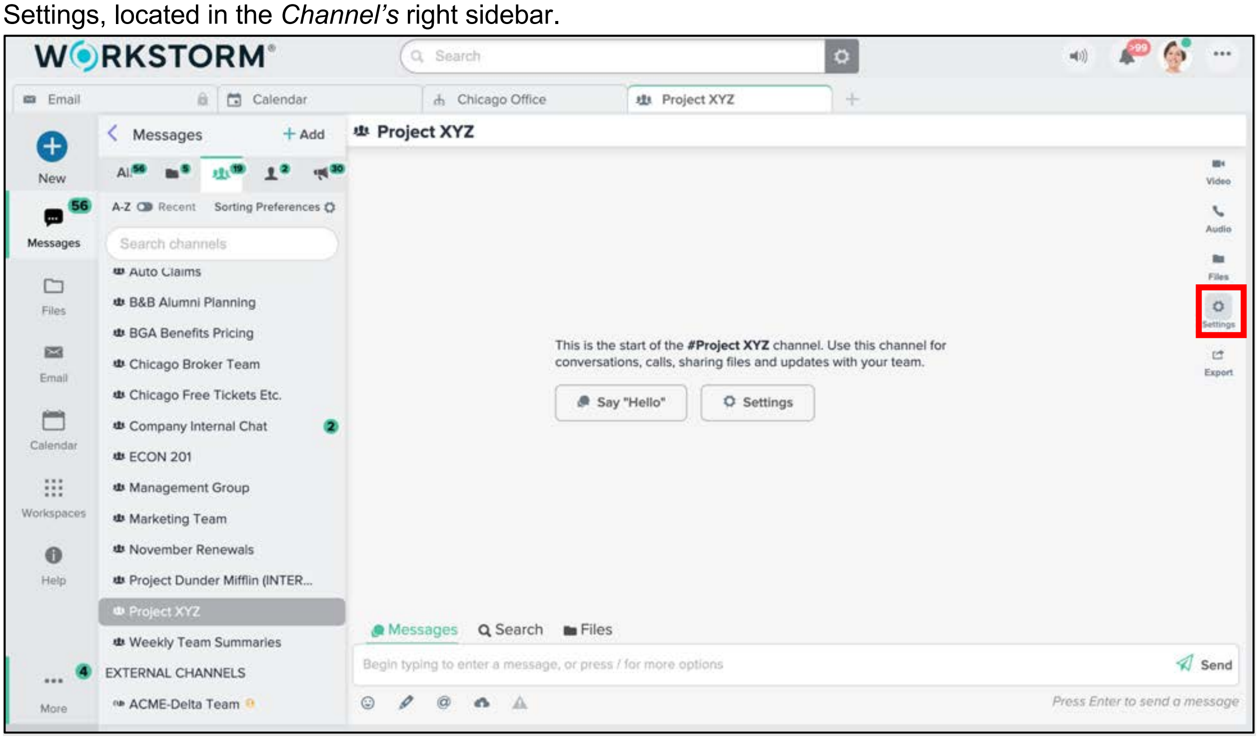


- Click the blue **New+** button at the top of the left sidebar, then choose **Channel** from the menu

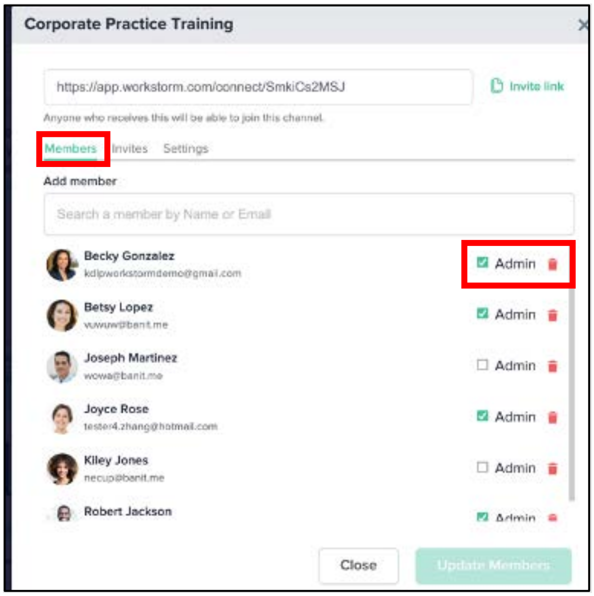


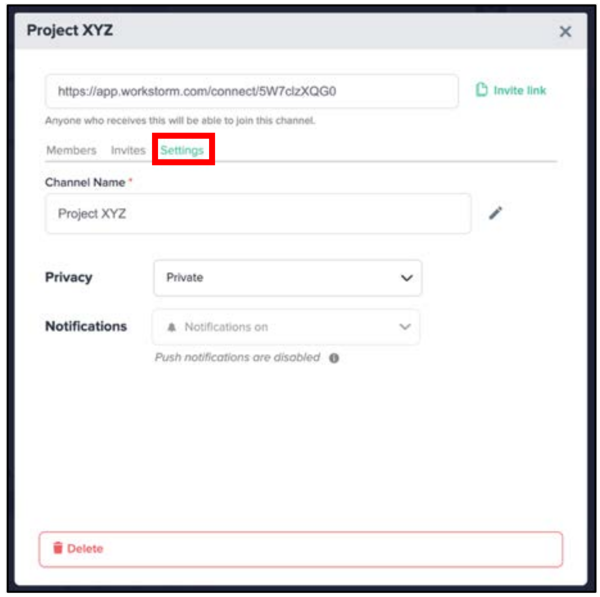
Channel Admin/Creator

[Channel Admins](#) can change the name, privacy settings, and membership of a *Channel* in *Channel Settings*, from Settings, located in the *Channel's* right sidebar.



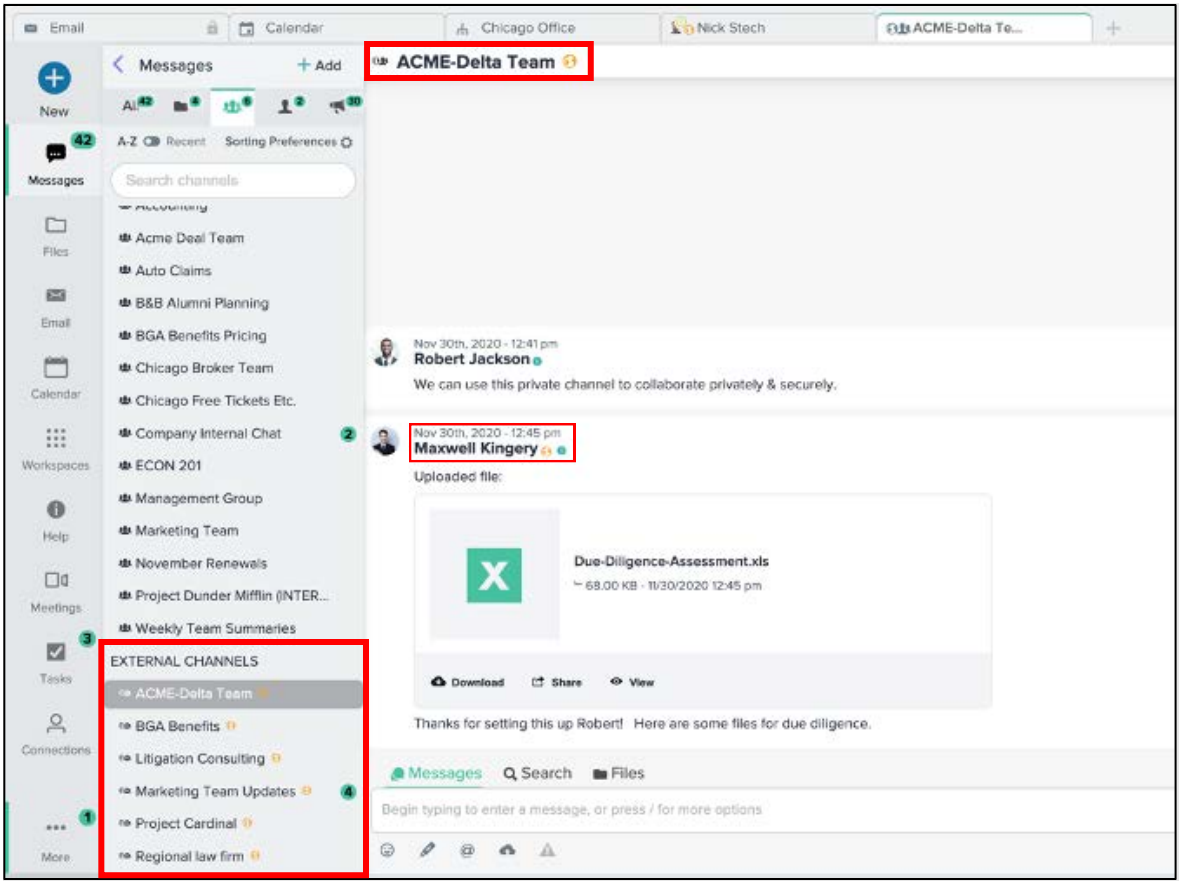
Assign *Channel Admins* in the *Members* tab by checking the **Admin** box next to the user's name. Rename your channel and access privacy settings by clicking the **Settings** tab in the pop-up screen. If needed, you can delete the *Channel* from here as well.





External Members

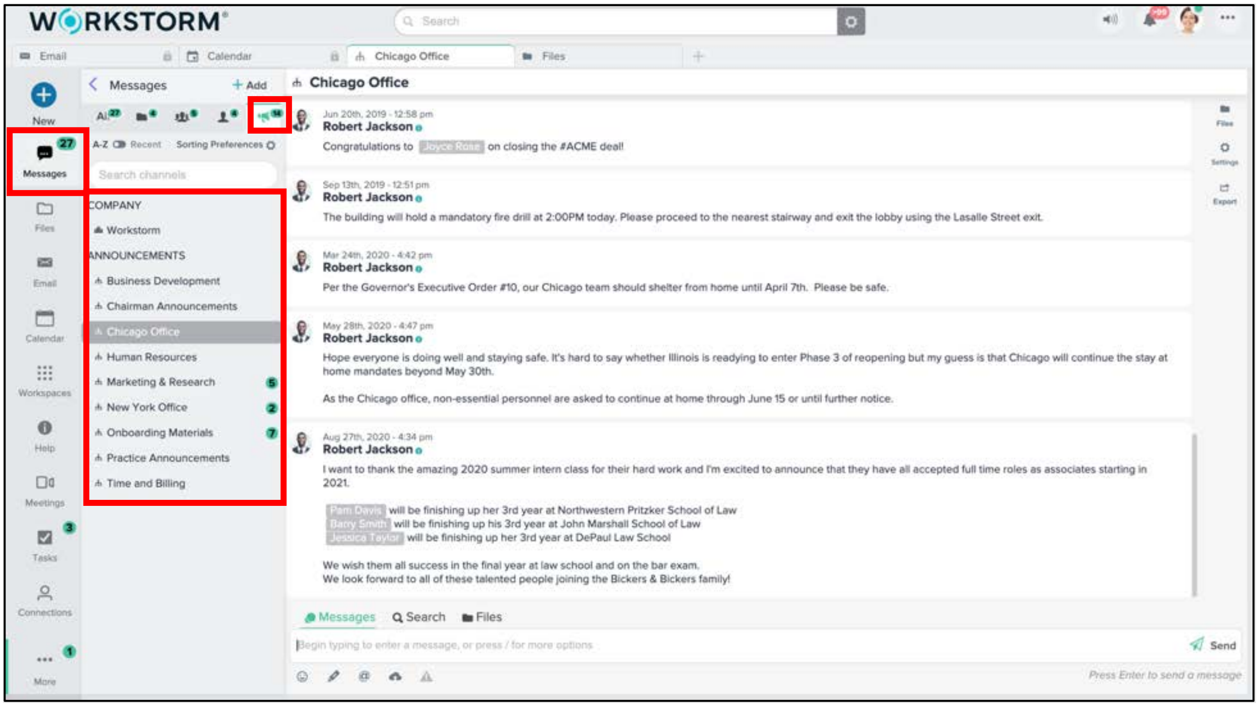
DMs or *Channels* with members from outside your company are categorized as External Messages in the *Messages* sidebar and marked with the orange globe icon.



Announcements

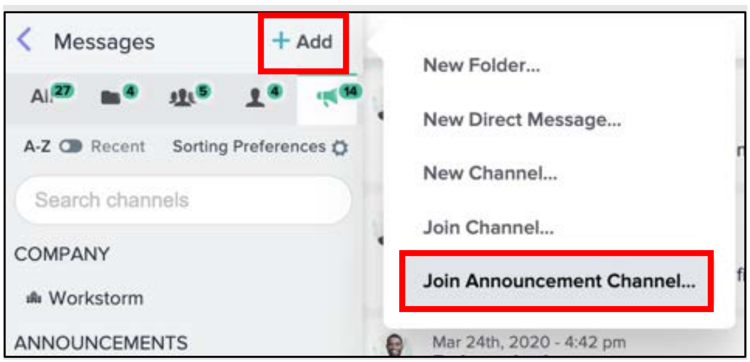
Announcement Channels are one-way broadcasts that only the company admin and division admins have privileges to post in. These channels are reserved for leadership announcements on items like HR or representing physical locations for offices.

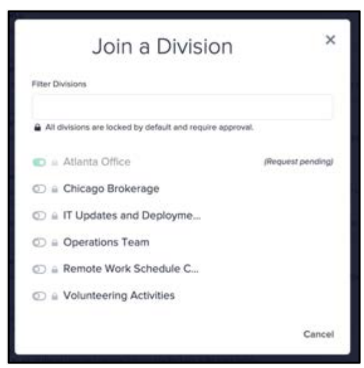
1. To access company-wide and division announcements, click **Messages** from the left sidebar and select the **Announcements** tab



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

2. To join an announcement channel, click the **+Add** button at the top right of the *Messages* menu and then **Join Announcement Channel** to view divisions that you can join





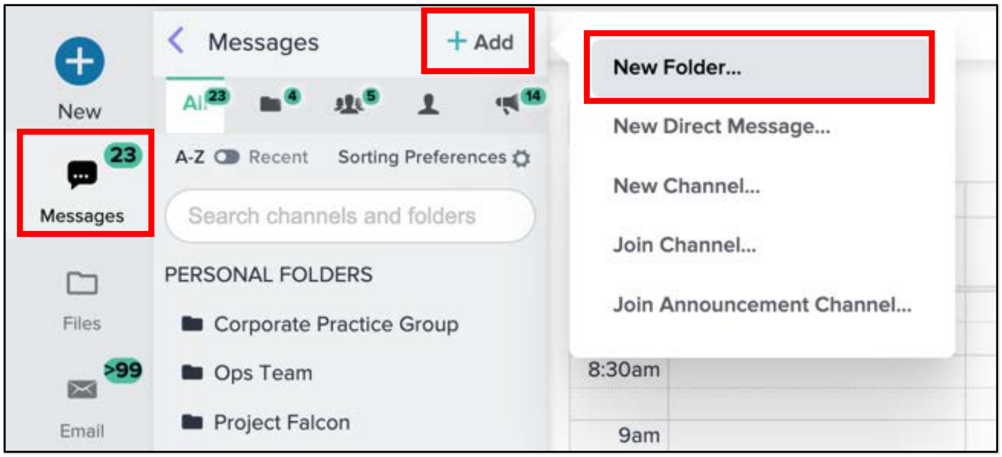
3. Click the toggle next to a division to request to join it

NOTE: If the division is locked, a division admin will have to approve your request. If the division is not locked, you will join automatically upon requesting.

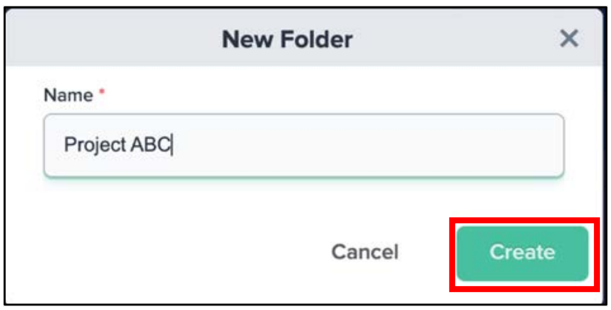
Messaging Folders

Organize your conversations into project-based groupings using a nested folder structure.

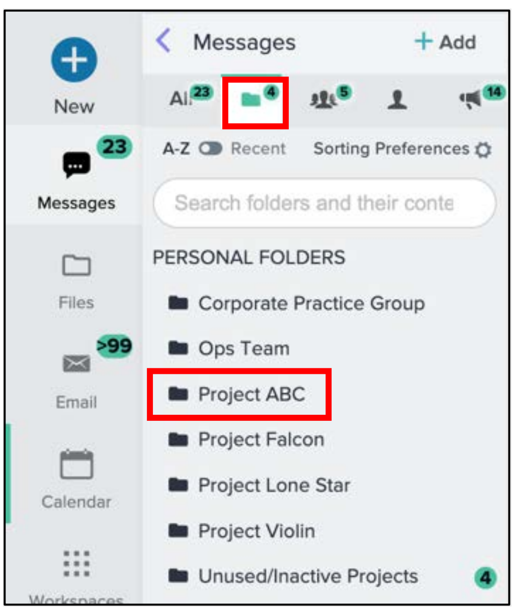
1. Click the **Messages** icon in the left sidebar
2. At the top right of the menu, click **+Add**
3. Choose **New Folder** from the menu



4. Name the folder and click the green **Create** button

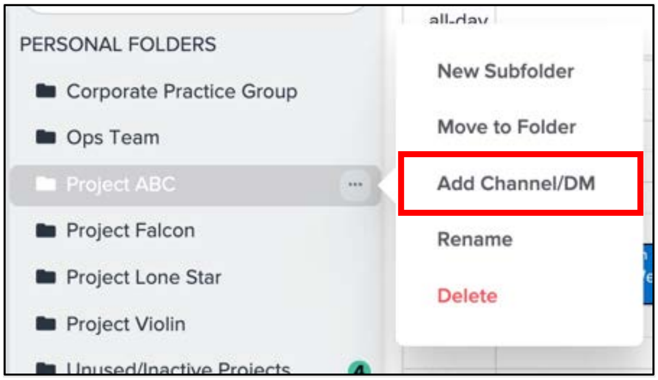


5. To view your created folder(s), click on the **Folders** tab in the *Messages* menu

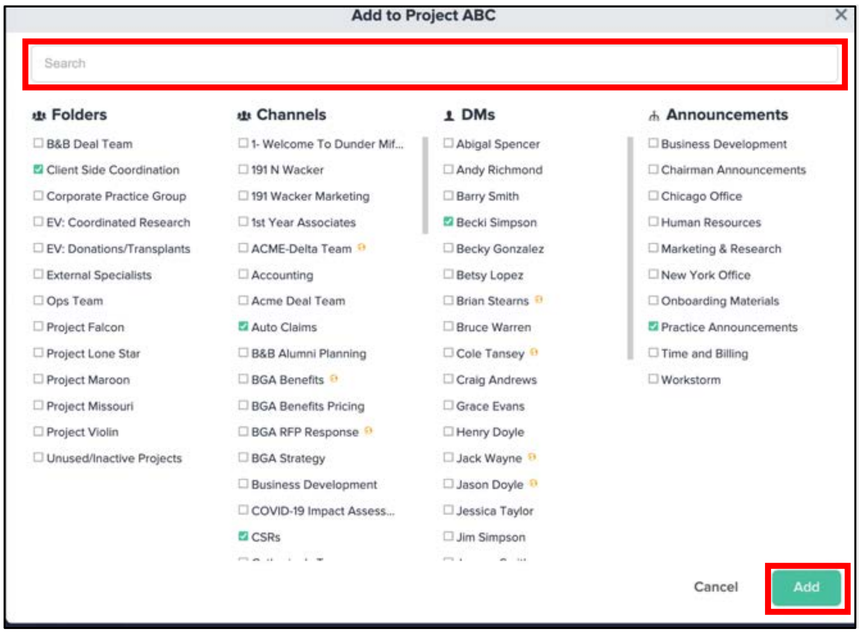


6. To populate your folder with conversations, hover over it, click the **ellipsis •••** button to the right, and choose **Add Channel/DM**

NOTE: You can add a new subfolder, move the folder to another folder, rename and delete the folder from the ellipsis menu as well.



7. Search for *Folders, Channels, DMs,* and *Announcements* to add to the folder and click the green **Add** button



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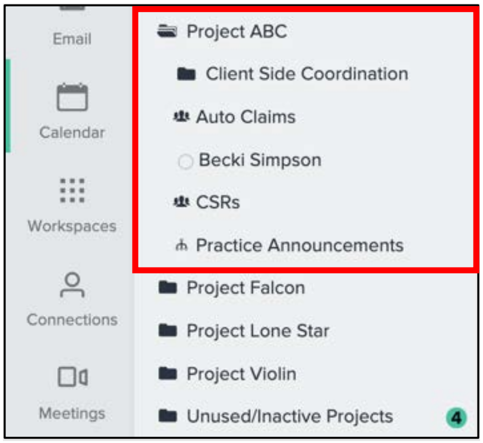
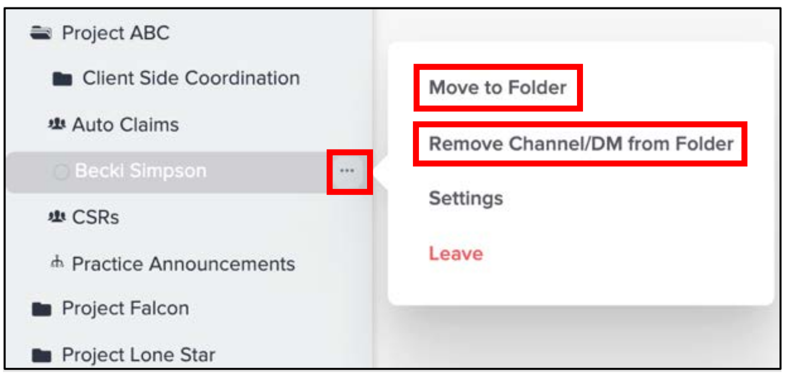
8. Click on the folder in the *Messages* menu to access its contents

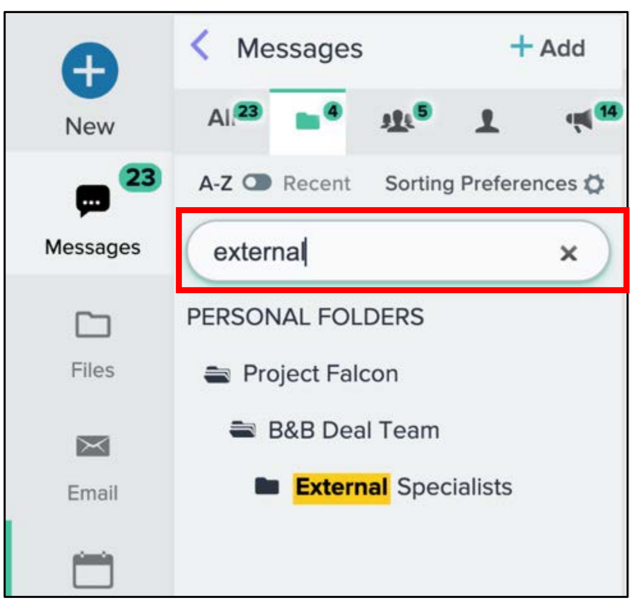


9. Click the **ellipsis •••** button and choose **Move to Folder** to move content from one folder to another and **Remove** to remove content from the folder

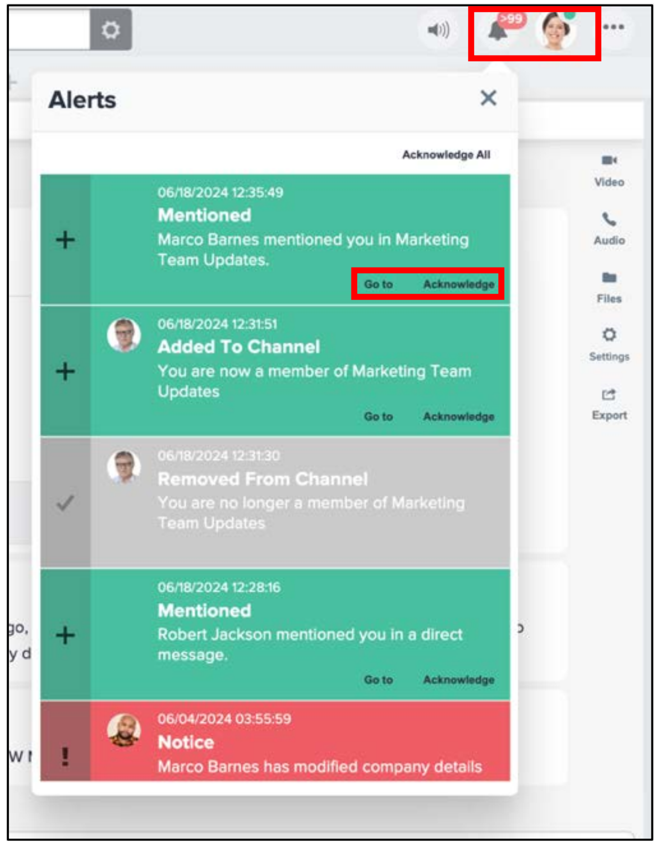
NOTE: You may also drag-and-drop contents from folders to rearrange your folder structure.



10. Quickly locate folders, subfolders and conversations in the **Folders** tab using the folder's search bar



Alerts



[Alerts] appear in the top-right corner when you:

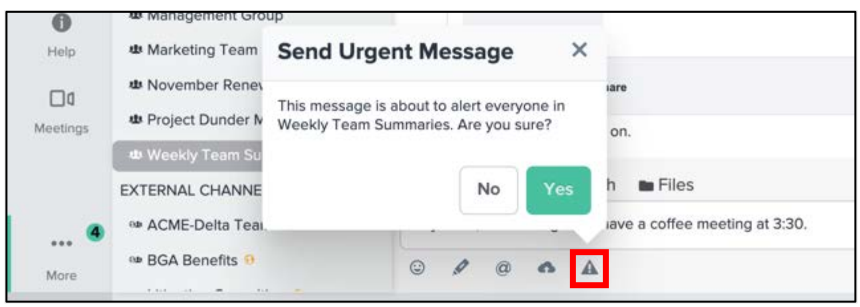
- Are added to a team
- Receive an urgent message
- Receive an [@mention] in a conversation

To access the *Alerts* menu, click on the **Alert** icon next to your profile picture. To view alerts within its conversation of origin, click **Go To.** Select **Acknowledge** or **Acknowledge All** to dismiss unread alerts.

Urgent Messages

[Messages that are sent as Urgent trigger] an Alert to the recipient(s).

1. To send an urgent message, click the **Alert** icon under the message box
2. Click the green **Yes** button on the subsequent prompt

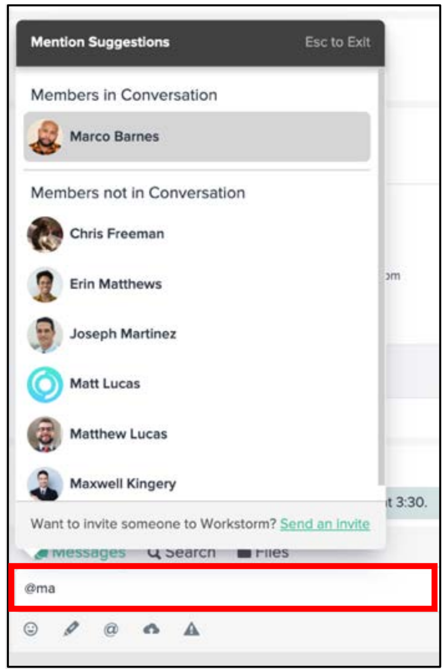


Urgent messages will appear as highlighted, making them distinct from normal messages.

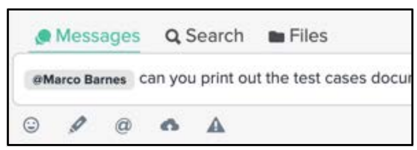
Mentions

Use @mentions to trigger an **Alert** to an individual member in a DM or Channel.

1. Type “@” followed by the first few letters of a colleague’s name
2. Select the member from the dropdown list of mention suggestions

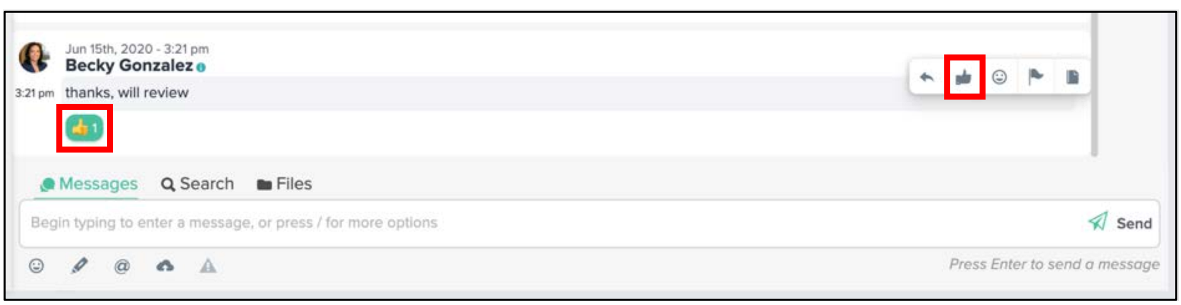


3. After selecting the member, their name will be highlighted in the message box
4. Write your message and press **Enter** on your keyboard to send it and alert them



Reactions

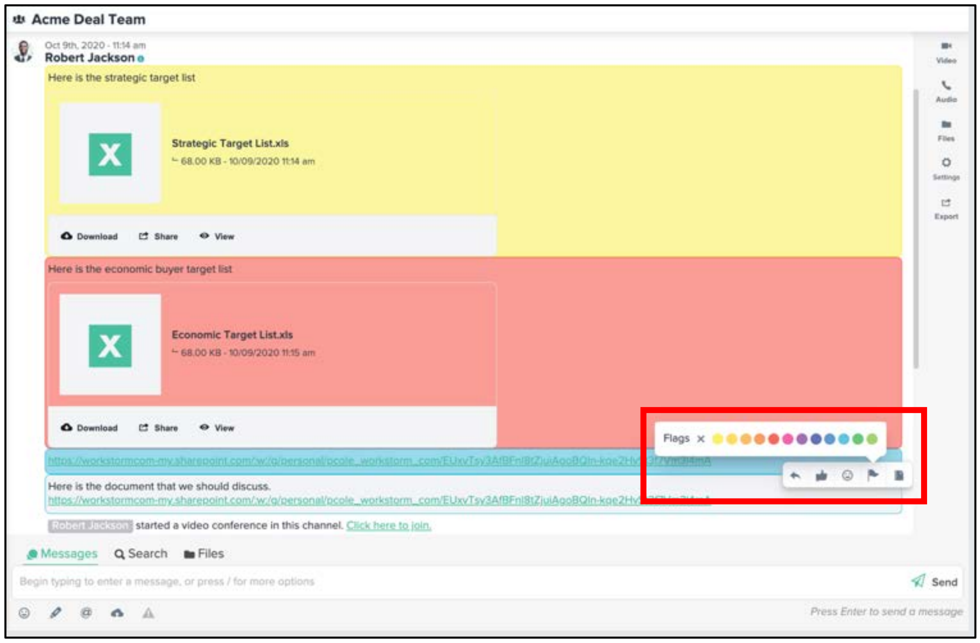
Show that you like a message by clicking the **Thumbs Up** icon that will appear at the upper right corner of the message on a mouse hover. Here’s an example of what it looks like when a user reacts to a message:



Flags

Flags allow you to color-code messages and enable you to search by those colors.

To flag a message, click the **Flag** icon in the upper right corner of the message and select a color.

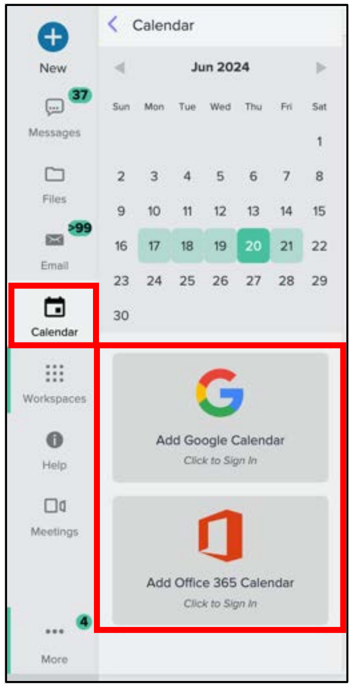


CALENDAR & EMAIL INTEGRATIONS

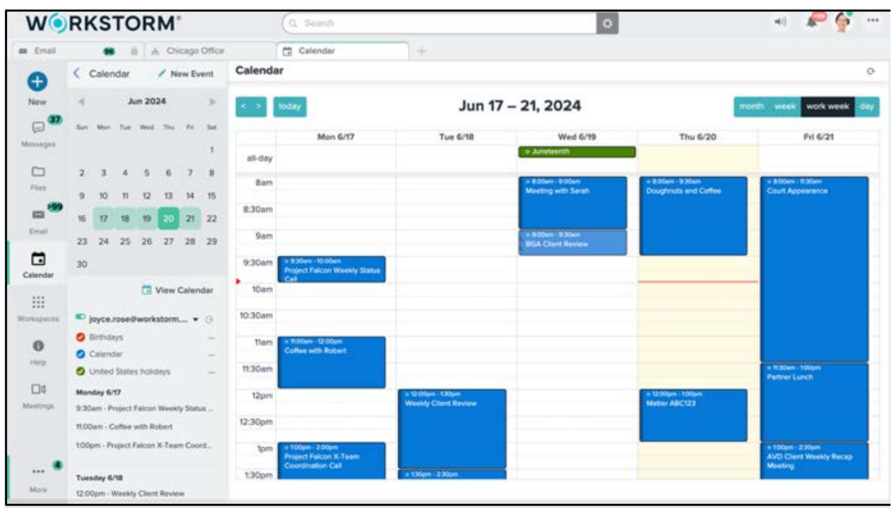
Calendar

After logging in with Microsoft 365 or Google, you will have access to your respective calendar within Workstorm.

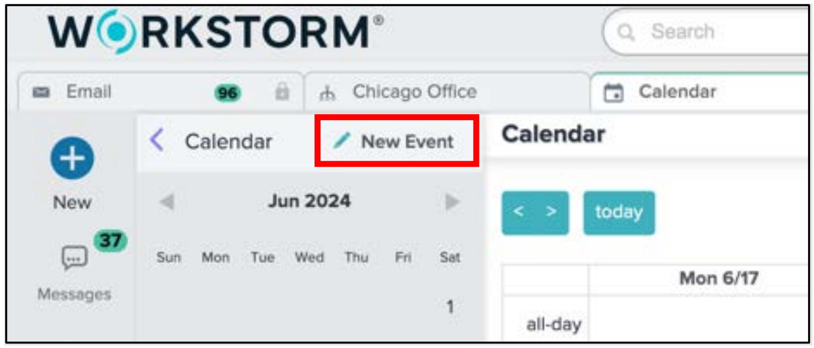
1. Click on the **Calendar** icon from the left sidebar or click on the **More** menu at the bottom of the sidebar
2. Choose to sign in with your Microsoft 365 or Google Calendar account



3. Once signed in, click **View Calendar** to pull up your calendar in Workstorm

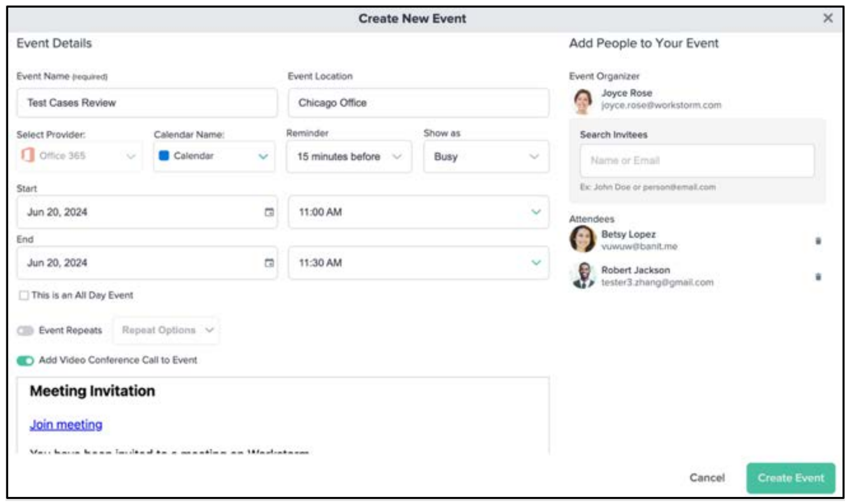


4. Create a new event by clicking **New Event** at the top of the *Calendar* menu or click anywhere on your calendar



5. In the *Create New Event* pop-up screen, choose to write event details, add a *Video Conference* call to the event, and add invitees

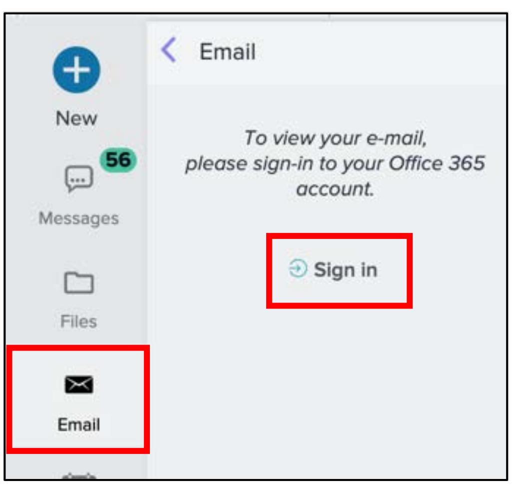
NOTE: You can always go back to edit these event details, if needed. The event organizer is the only one with these privileges.



Email

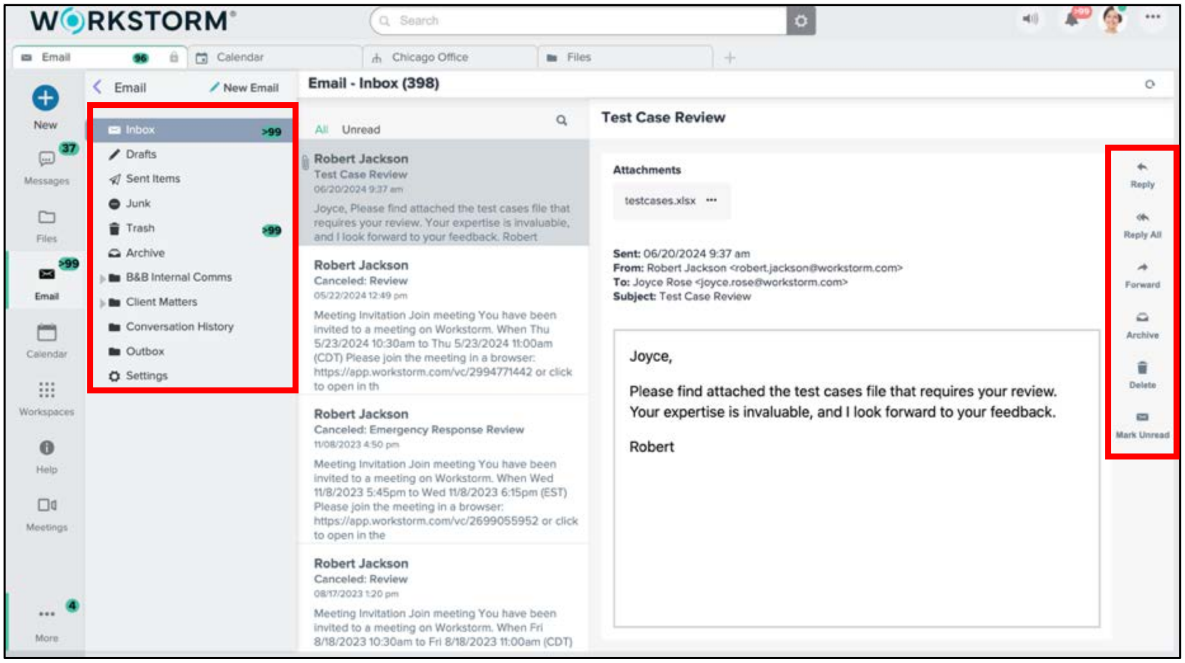
Connect Microsoft 365 Email

1. Click the **Email** icon in the left sidebar**
2. Click the **Sign in** button to enter your credentials and log into your email account



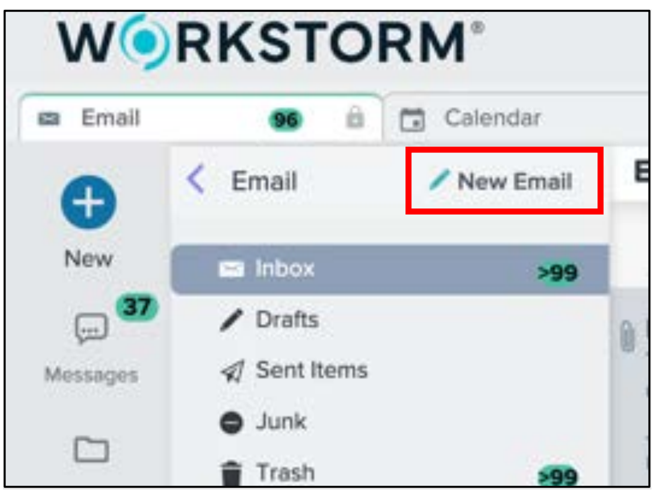
***NOTE: Make sure you have enabled fully featured mode. If you do not see Email in the left side bar, contact your site administrator to enable the Email integration feature.*

3. Once signed in, access your Microsoft 365 account inbox, folders, and settings
4. Reply, forward, archive, delete, or mark emails as unread from the toolbar on the right



Send a New Email

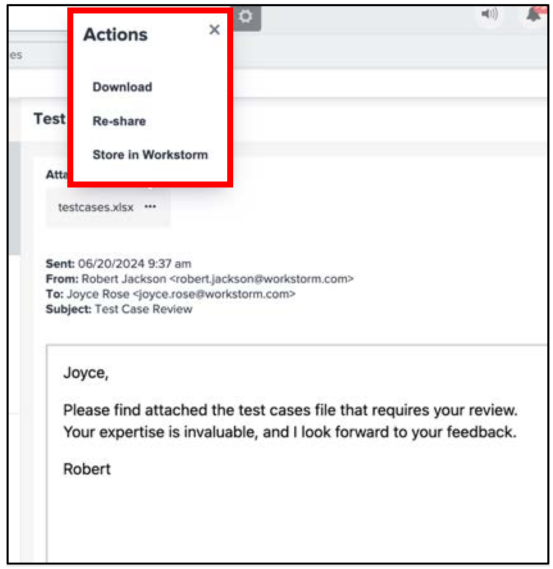
1. Click **New Email** from the top of the *Email* menu



2. In the *New Email* window, add recipients, CC other colleagues, write a subject line, and add attachments, just as you normally would
3. When finished, click the green **Send** button

Share an Attachment to a Channel or Direct Message

Click the **ellipsis •••** button 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 **Store in Workstorm** or save it to your file repository and re-share it with a colleague or team conversation by clicking **Re-share**.

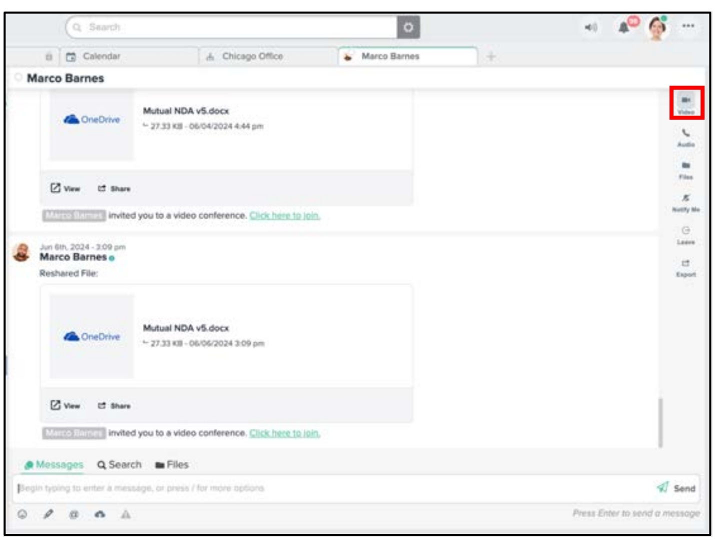


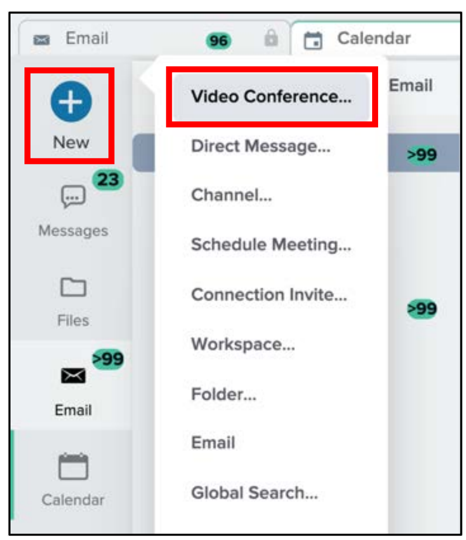
VIDEO CONFERENCING

Use video conferencing to collaborate with colleagues on projects on a face-to-face basis, utilizing features such as screen-sharing, call recording and layout customization.

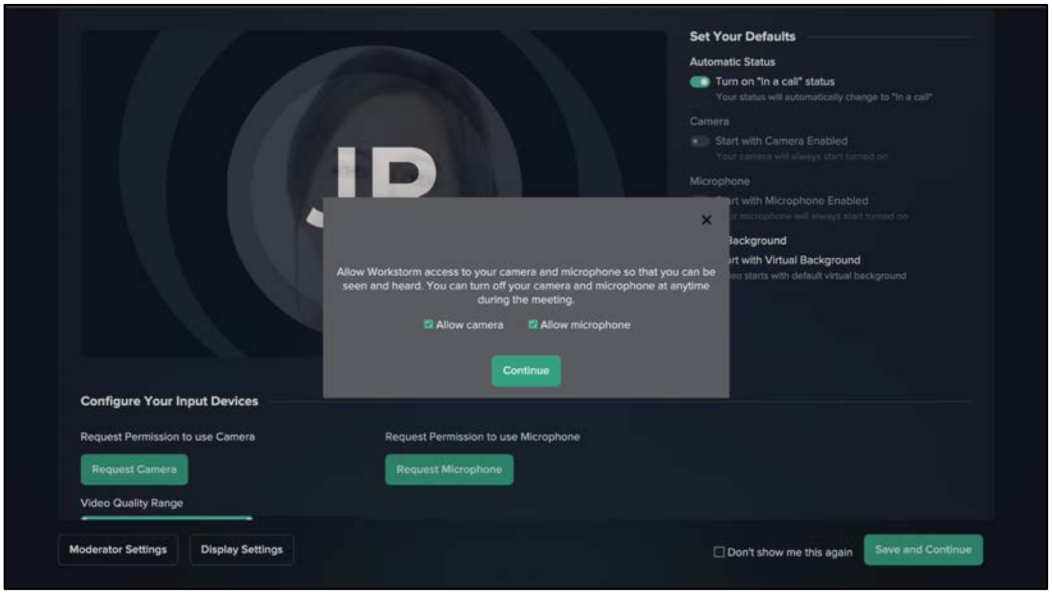
Starting a Video Conference (VC)

1. There are two ways to start a *Video Conference*:
    a. From a *Channel* or *Direct Message*, click the **Video** icon on the right toolbar within any conversation. This is the recommended way for one-click to call. Everyone in the channel or direct message will be invited automatically to join the meeting.
    b. From the blue **New+** button, click **Video Conference**. If you choose this option, you will need to add attendees after the call launches.

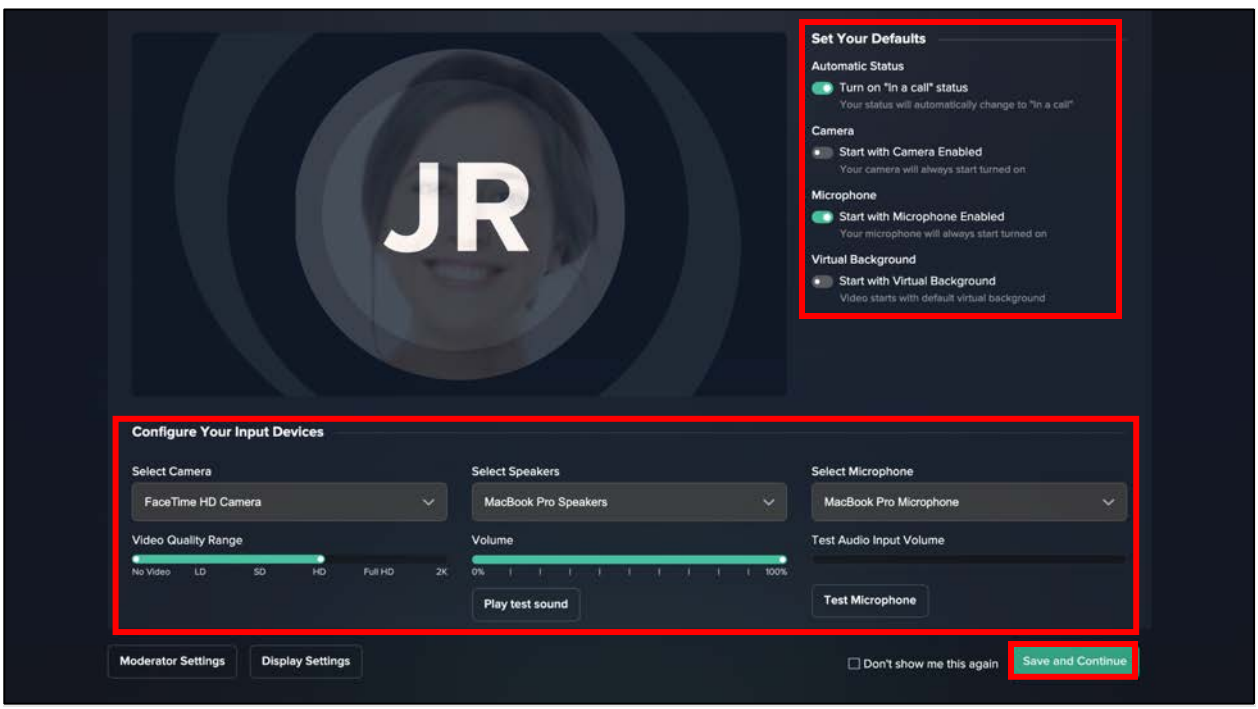




2. After starting a call, you will be prompted to adjust your VC settings as desired and enable permissions for camera and microphone



3. In this settings screen, choose whether to start with camera and microphone enabled, to have a virtual background, configure your input devices, and click the green **Save and Continue** button

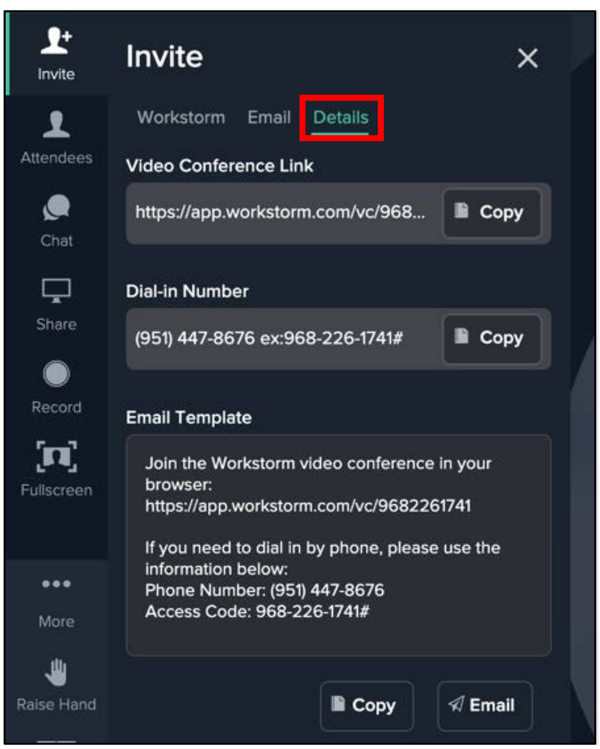


*NOTE: If you do not want to see this default selection screen again upon starting a VC, click "Don't show me this again" to the left of the green **Save and Continue** button.*

Video Conference Invites

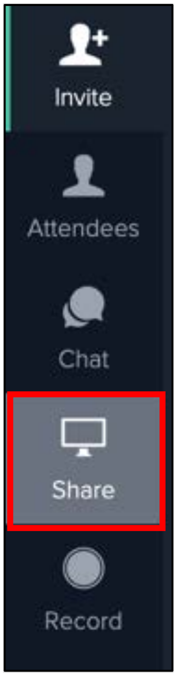
1. Invite additional participants by clicking the **Invite** icon at the top left of the VC window
2. Search for colleagues and select their names to invite them to the call
3. Click the green **Send Invites** button after they're selected, and they will receive an invite via Workstorm app to join the meeting in progress

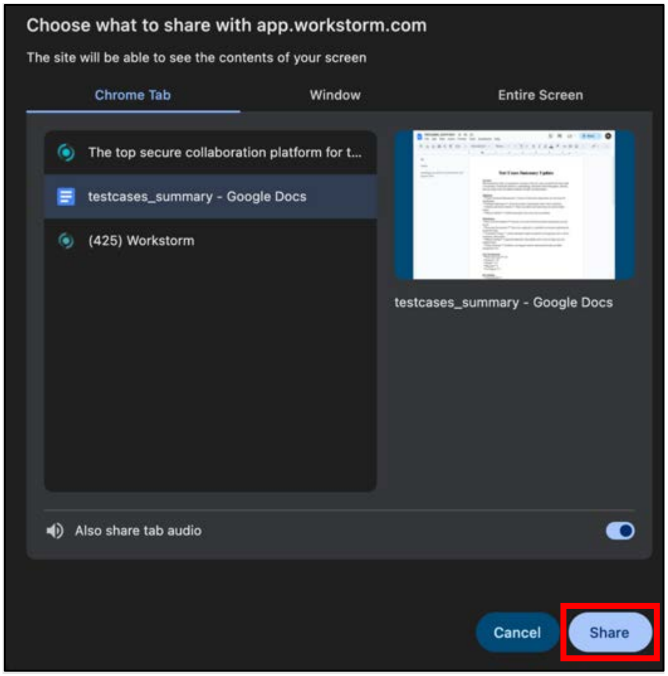
4. Click on the **Details** tab in the invite menu to bring up dial-in information and a link to the VC that you can share with colleagues or external parties that need to join the call



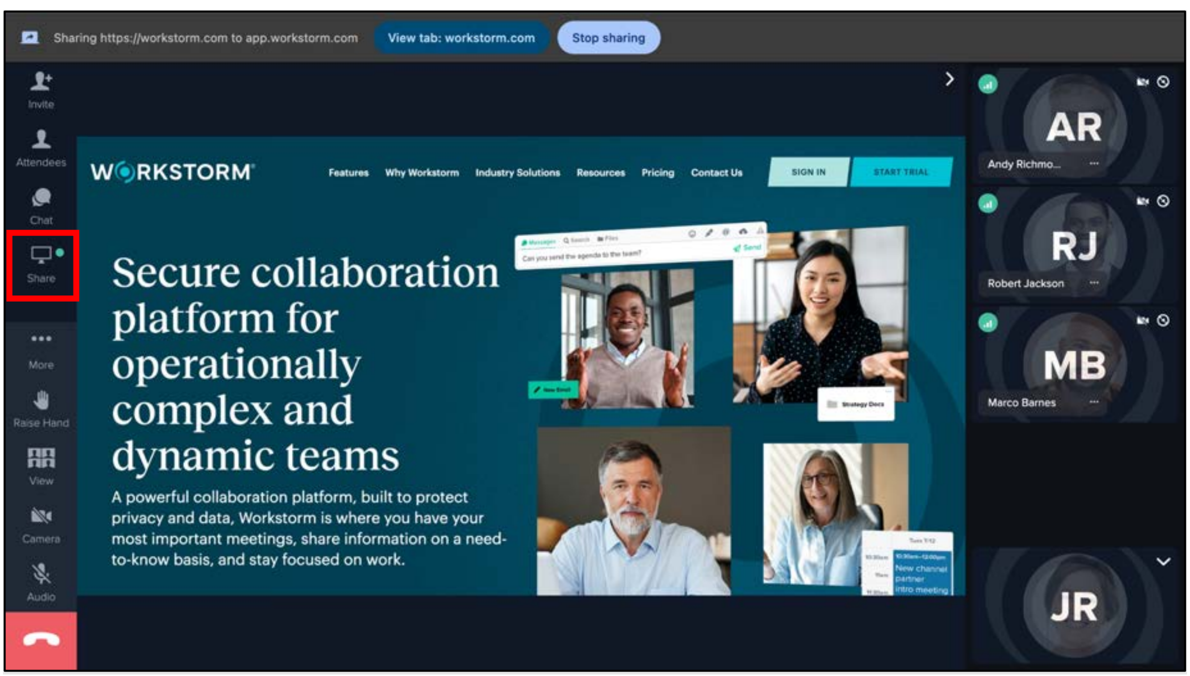
Sharing your Screen

Share your screen by clicking the monitor icon from the left-side toolbar. Choose between sharing your entire screen or sharing a window or tab specifically. After selecting what to share, click **Share**.





A green dot indicator over the Share icon will let you know you are currently sharing your screen.



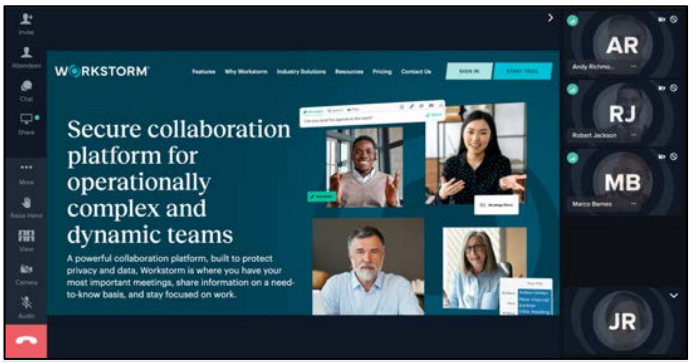
Choosing your Layout

Workstorm provides two VC layout options, *Stage Mode* and *Grid Mode*. *Stage Mode* will follow and enlarge the dominant speaker. On the other hand, *Grid Mode* allows you to see other attendees in a grid layout based on your viewing preferences.

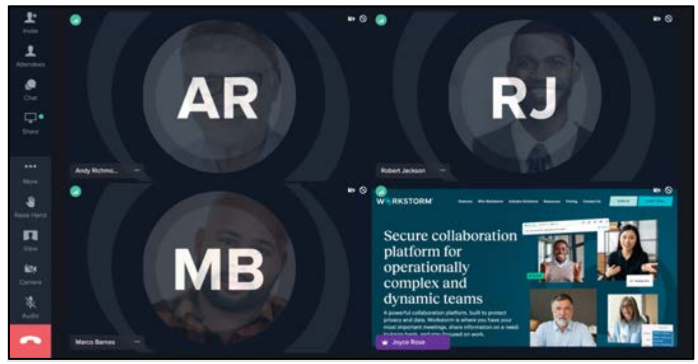
By default, VCs start in *Stage Mode*. All other attendees will be located on the right side.

To switch to *Grid Mode*, click the **View** icon from the left-side toolbar to switch. You can always switch back to *Stage Mode* by clicking **View** again.

Stage Mode

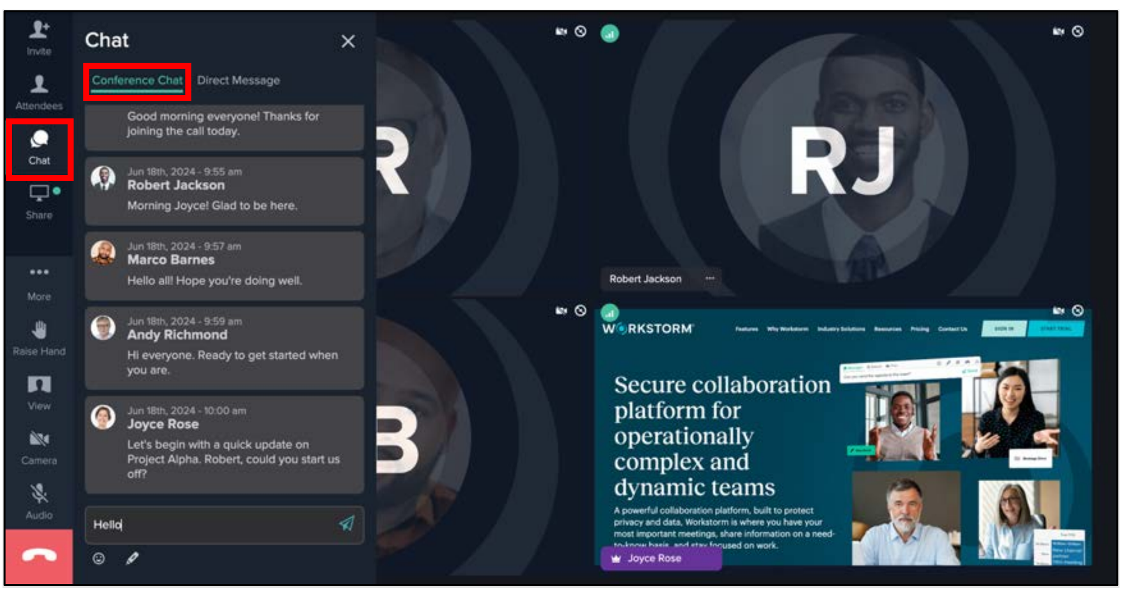


Grid Mode

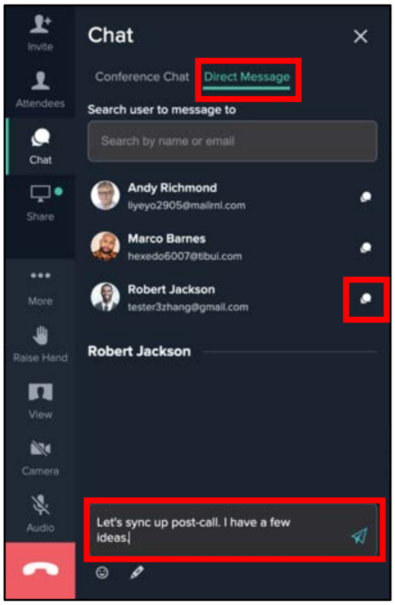


Conference Chat & Direct Messages

Users can send messages to everyone in the conference with the *Conference Chat*. Access *Conference Chat* by clicking on the **Chat** icon from the left sidebar.



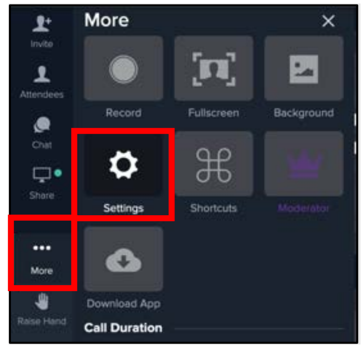
Send a direct message to a specific person in the chat by clicking on the **Direct Message** tab within the *Chat* menu. Use the search bar to find the user you would like to message. Then, click on the speech bubble next to their name to write them a message. Press **Enter** on your keyboard to send it.



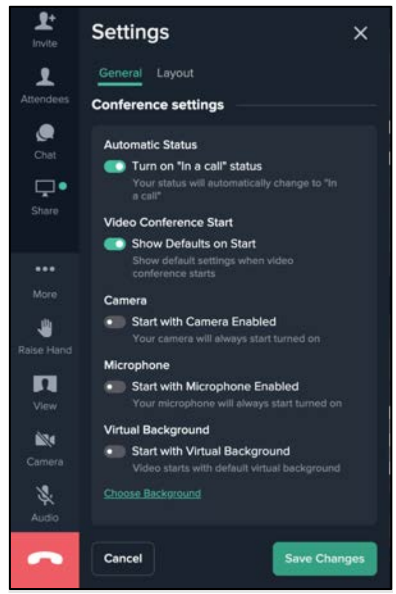
NOTE: Conference chats are only available during the active meeting and are not accessible once the meeting ends.

Updating Video Conferencing Settings

1. To access the VC settings, click on **Settings** from the left sidebar
    a. Depending on how large the window is, you may need to access **Settings** by clicking on the **More** icon from the left sidebar. Then, click on the **Settings** option.



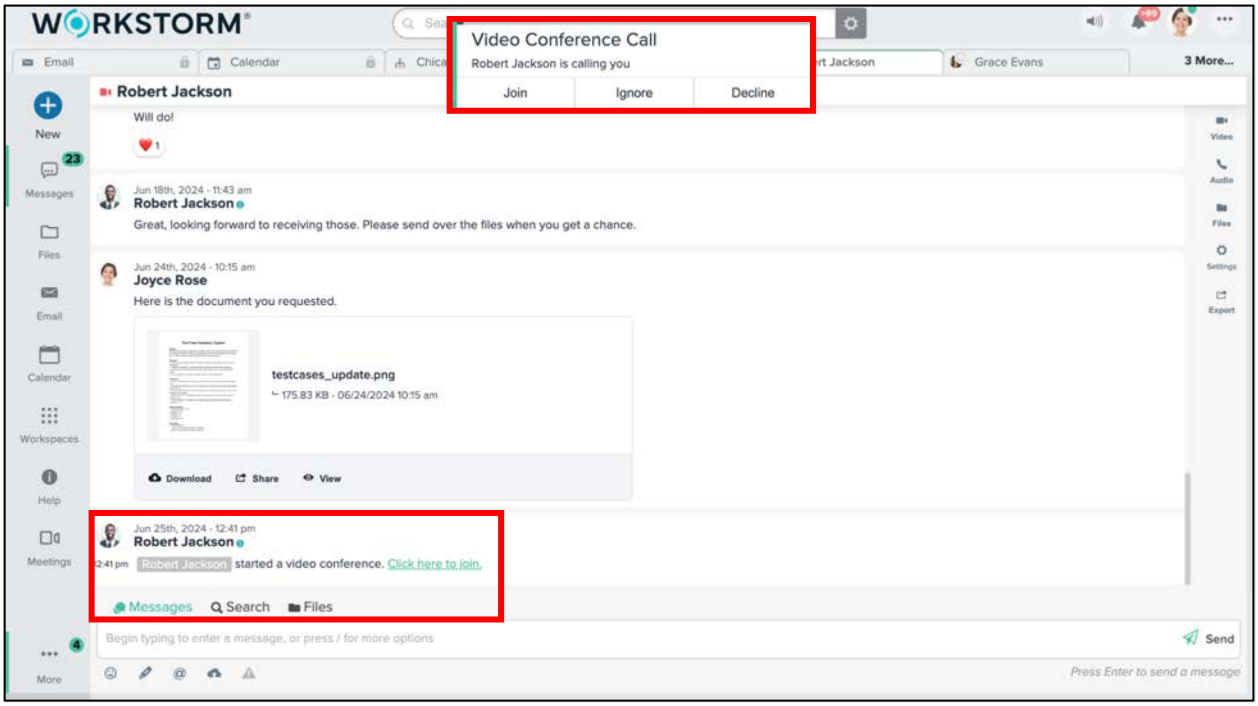
2. In the *Settings* menu, adjust general conference settings as desired and then click the green **Save Changes** button



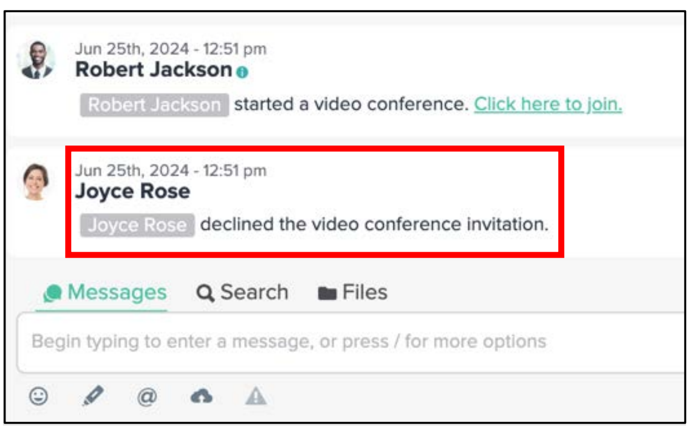
3. Click on the **Layout** tab within the *Settings* menu to make changes to your layout preferences
    a. You can change the number of video feeds that appear on your screen and the location of the toolbar.
4. Click the green **Save Changes** button when finished

Joining a Video Conference

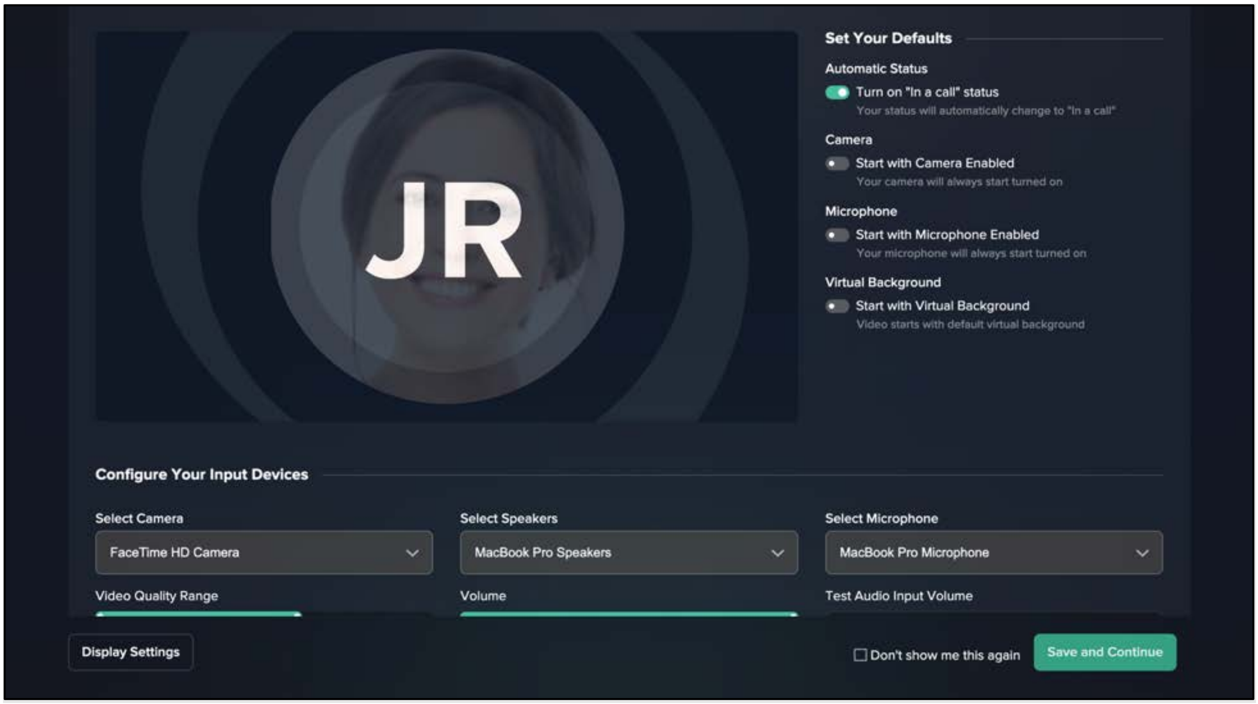
When a colleague invites you to join a VC, you will receive a toast notification at the top of your screen. You can choose to click **Join**, **Ignore,** or **Decline**. Additionally, you will receive a message with a link to join in the respective DM or Channel.



*NOTE: Choosing **Decline** will send a message to the person or channel inviting you that you declined. Choosing **Ignore** will not send a message.*

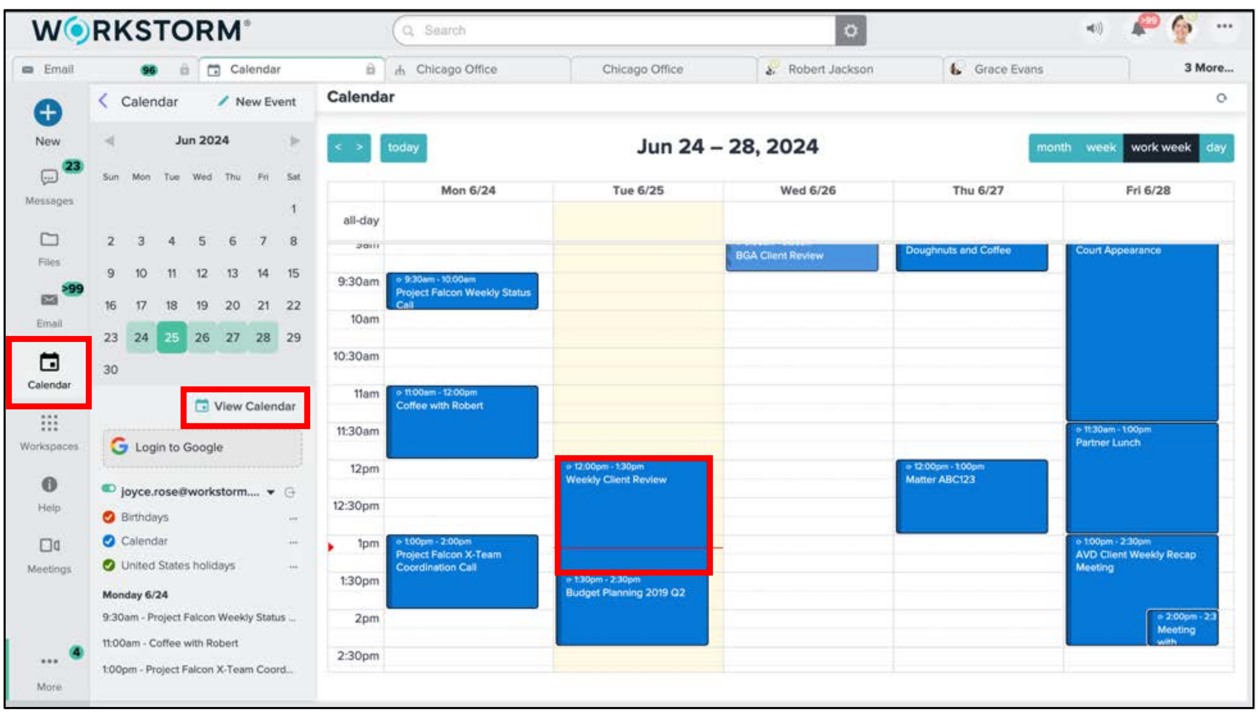


Upon clicking **Join**, you will be prompted to adjust your VC settings as desired. Then, press the green **Save and Continue** button to enter the conference.

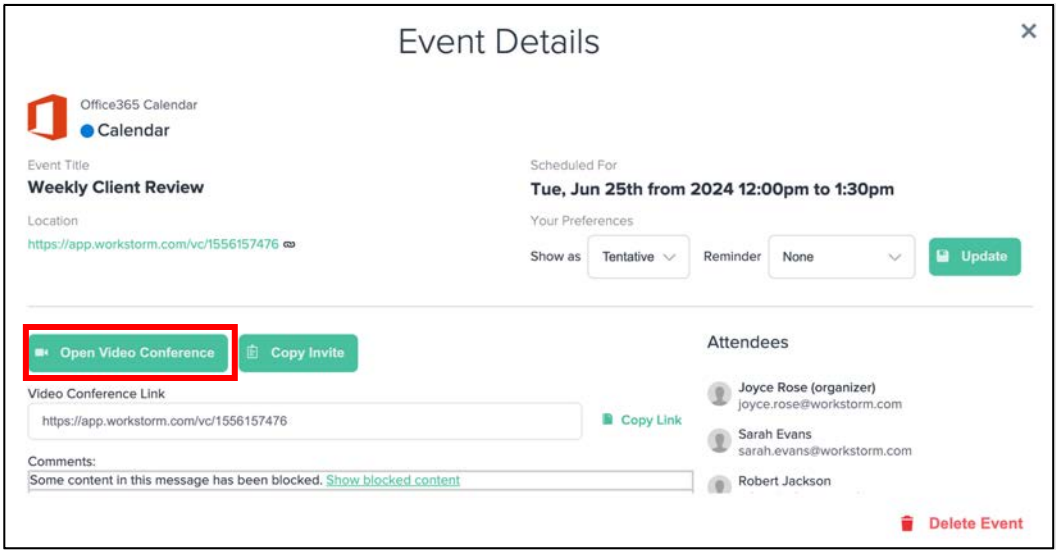


If invited to a VC as part of a Calendar event:

1. Navigate to the **Calendar** icon from the left sidebar
2. Click **View Calendar** from the *Calendar* menu
3. Click on the event to open the event preview



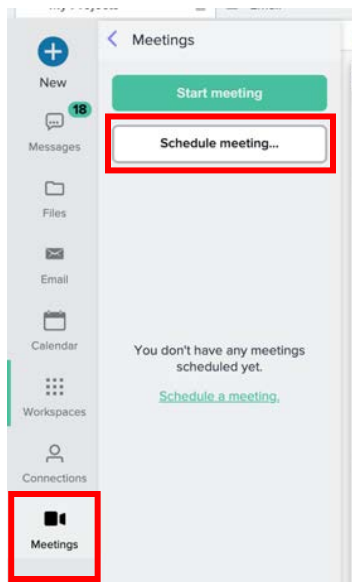
4. Click the green **Open Video Conference** button to join the VC



MEETINGS

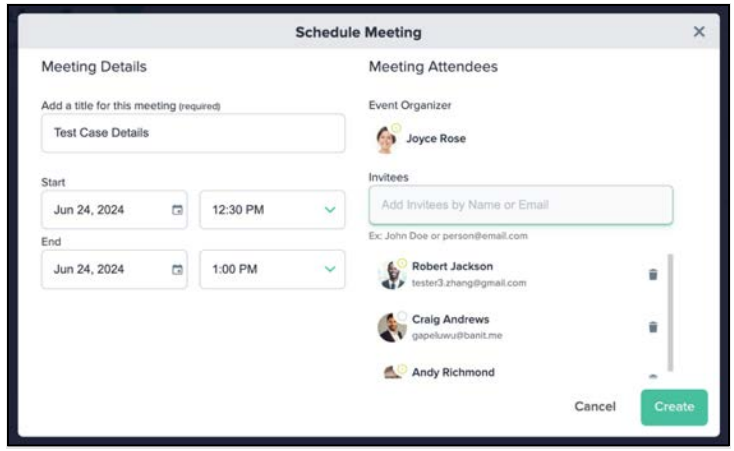
If you do not integrate with Microsoft 365 or Google Calendar, **Meetings** is an alternative method for scheduling events with colleagues. To schedule a meeting:

1. Select the **Meetings** icon from the left sidebar
2. In the *Meetings* menu, choose **Schedule Meeting**

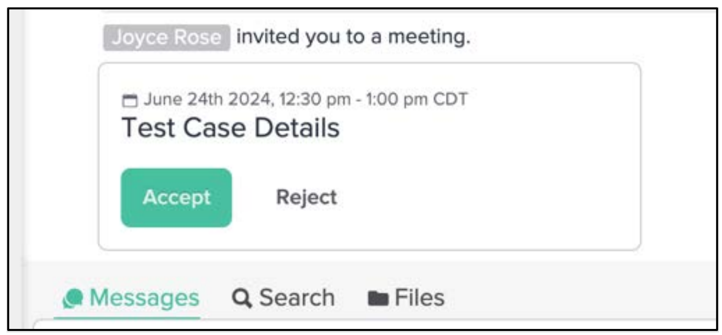


3. In the *Schedule Meeting* pop-up screen, give the meeting a title, a start/end time, and add invitees either by name or email

4. Click the green **Create** button when finished



After the meeting is created, all invitees will receive a DM from you in Workstorm with the meeting invitation and information. They will be prompted to either **Accept** or **Reject** the invite.



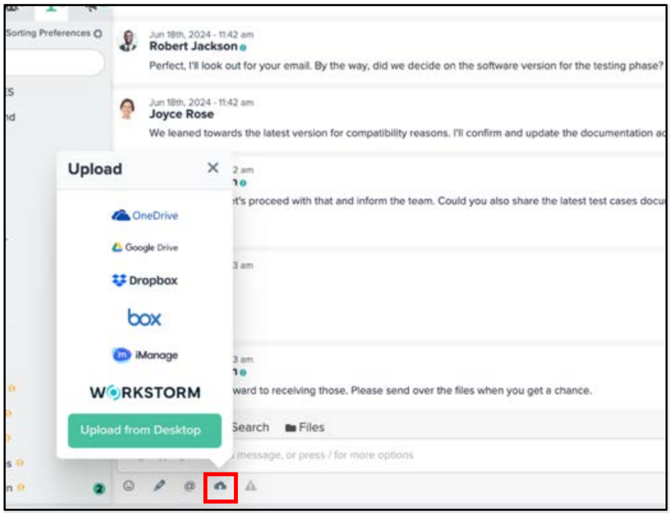
WORKSTORM

FILES

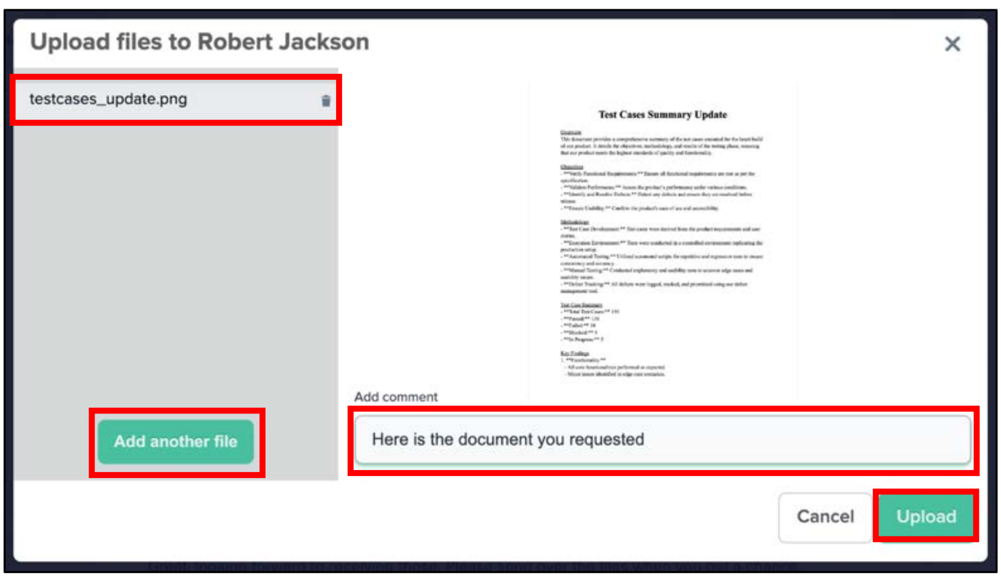
Upload, share and manage your files on Workstorm. Integrate with various Document Management Systems (DMS).

Share a File

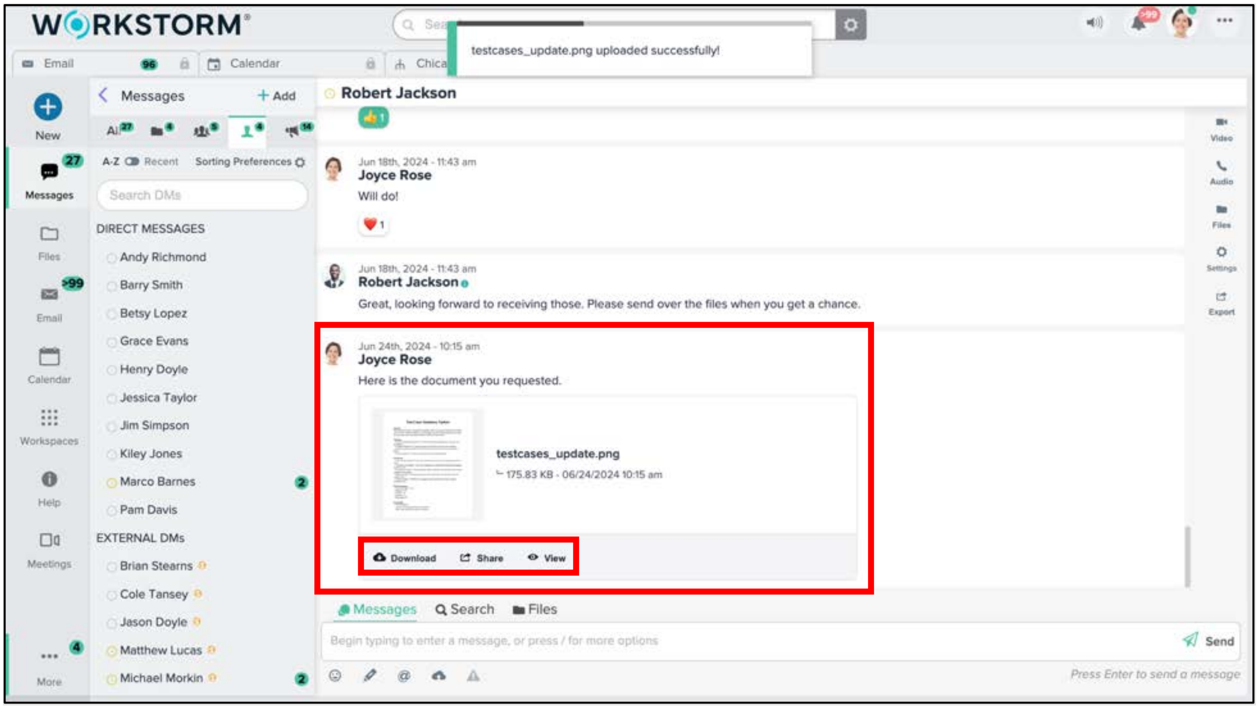
1. Share files within a *DM* or *Channel* conversation by selecting the **Upload File** icon to open the *File Uploader,* or drag and drop a file into the message box



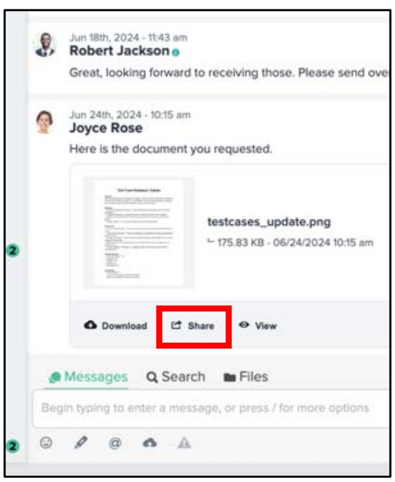
2. Choose to upload a file from your Workstorm DMS, your Desktop, or an integrated DMS, like Dropbox
3. Add a comment to accompany the uploaded file in the provided text box and click the green **Upload** button

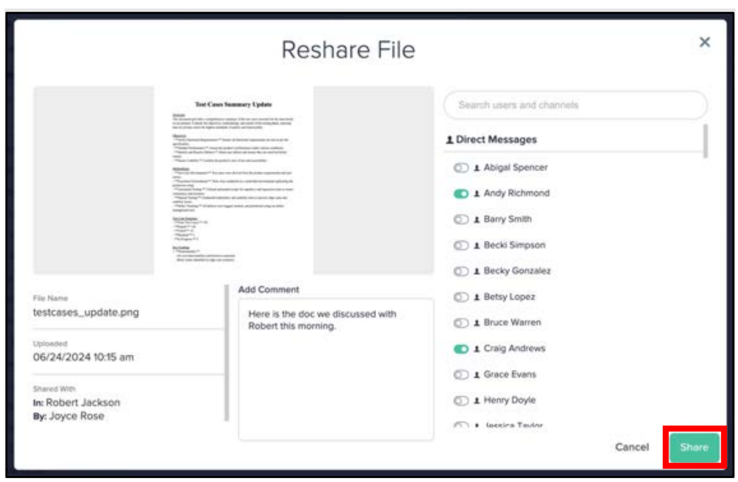


The file will appear in the *Channel* after it is uploaded. Users can **Preview**, **Download** or **Re-share** files shared with them.



To re-share the file with another user on the platform, click the **Share** icon. Choose the desired user(s)/channel(s) to share the file with. There is a search bar for easier access as well. When ready to send, click the green **Share** button.

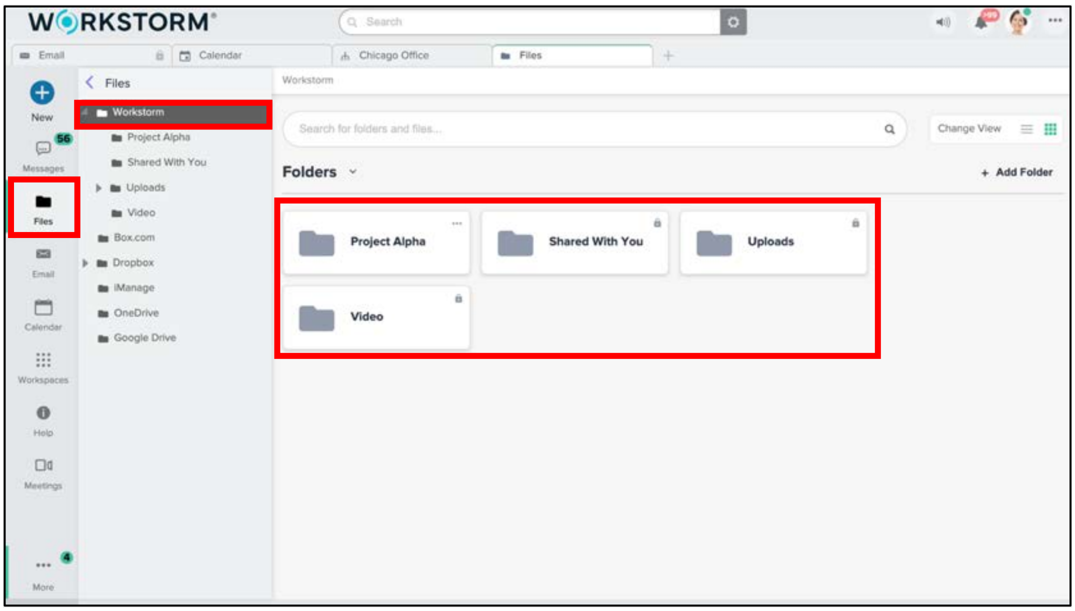




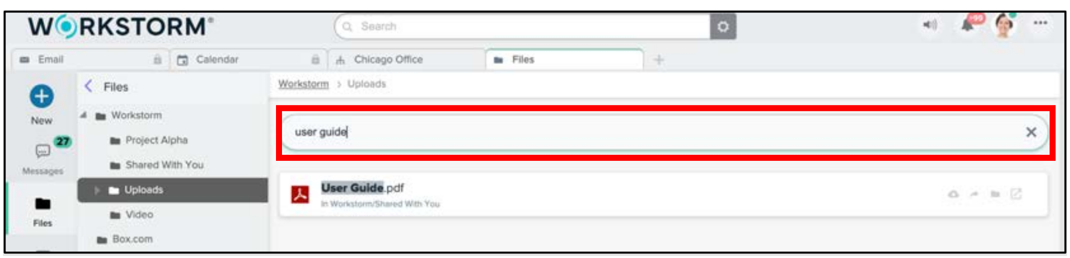
File Management

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

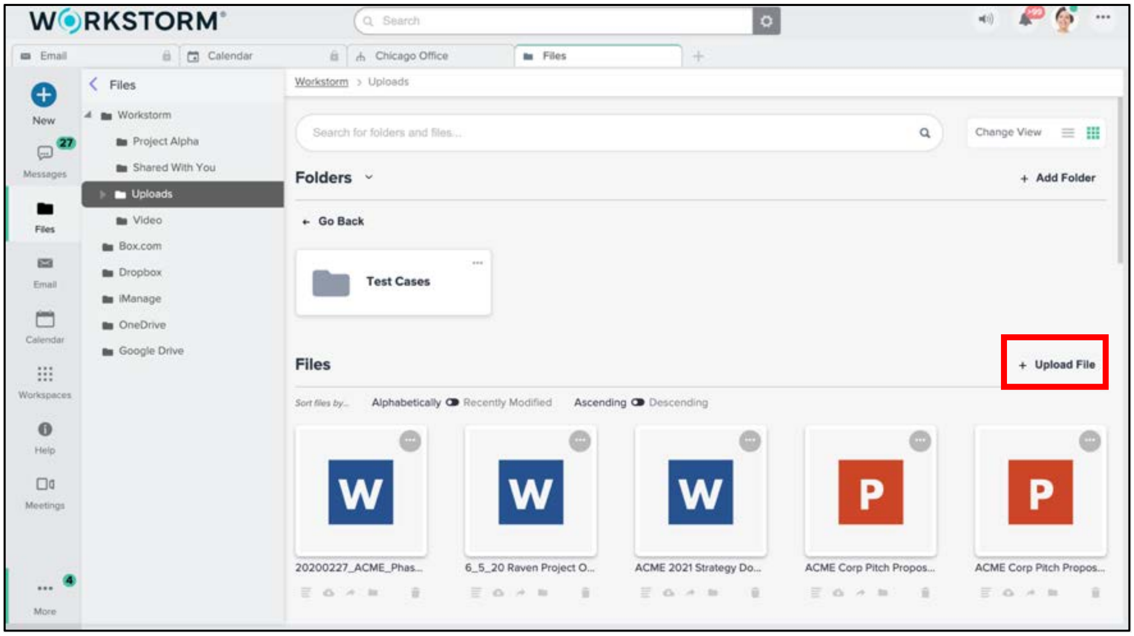
1. Select the **Files** icon from the left sidebar
2. From the *Files* menu, click **Workstorm** to access the DMS
3. Click on a folder to see its contents



4. Search for files using the provided search box at the top of the page



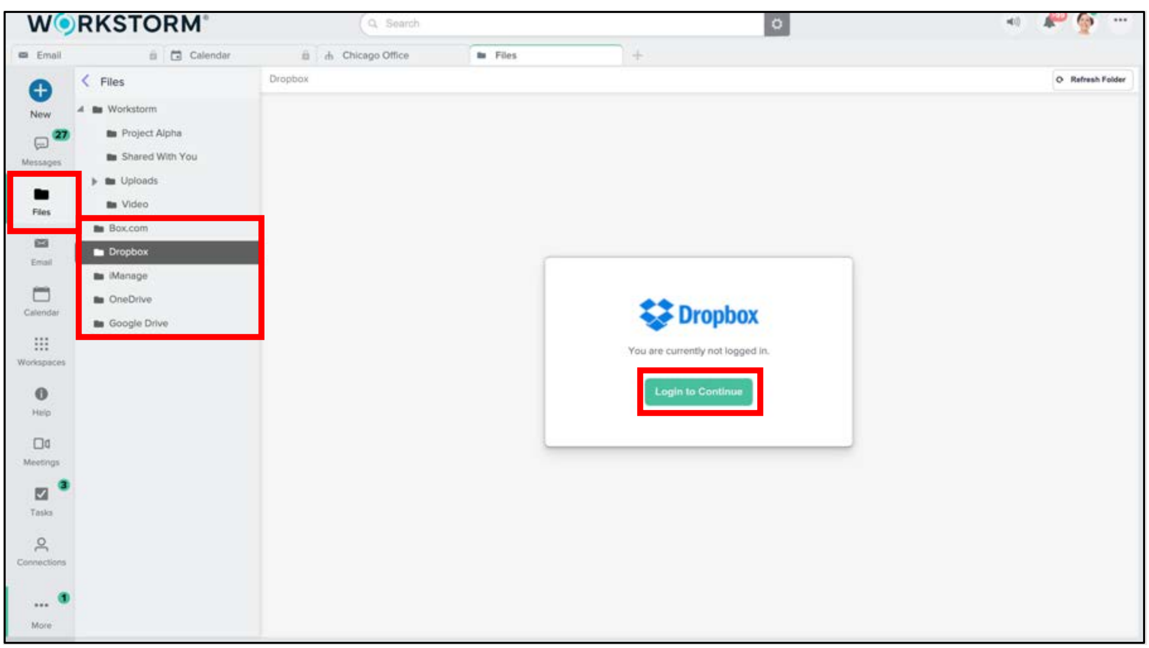
5. Inside of a folder (Uploads, Video, or any custom folder you create), upload files to store for later use by selecting the **Upload file** option on the right



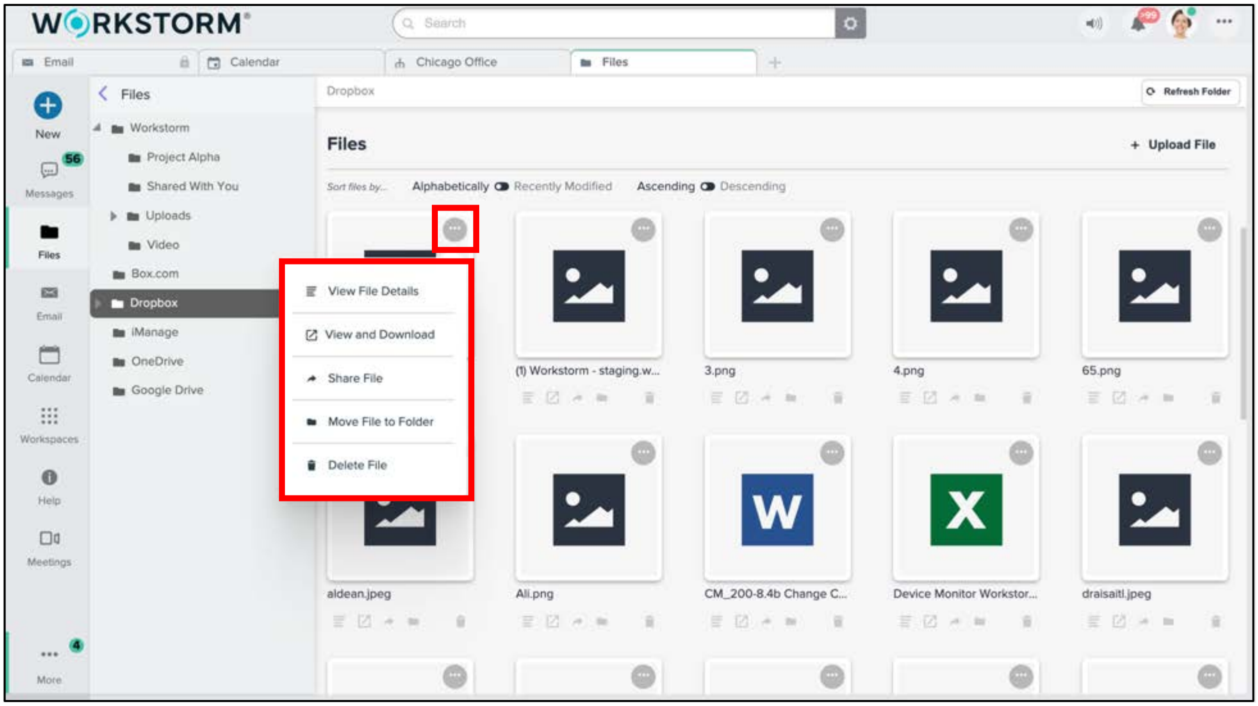
Document Management Integration

Integrate with Document Management Systems (DMS) directly in your Workstorm.

1. Click on the **Files** icon from the left sidebar
2. Under the Workstorm folder, click on any DMS folder, then click the green **Login to Continue** button and enter your credentials to login to your DMS account



3. View, download or re-share a DMS file by selecting the **ellipsis •••** in the top right of a file, then choosing the respective option



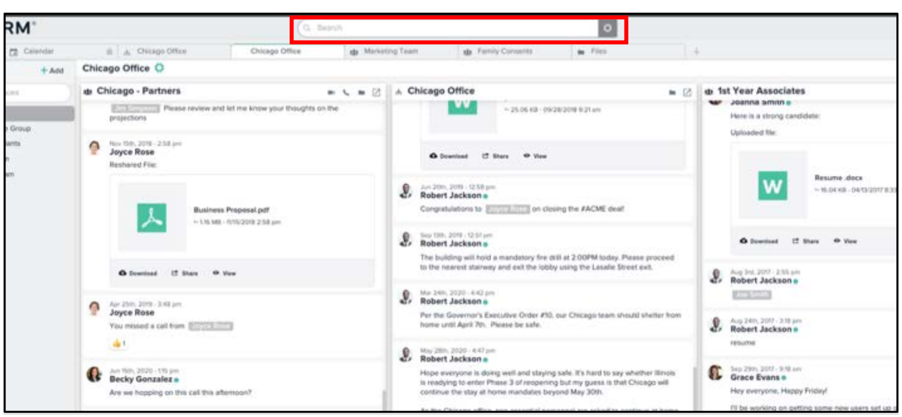
SEARCH

Utilize both Global and Local conversation search to quickly find content that you're looking for across the Workstorm app.

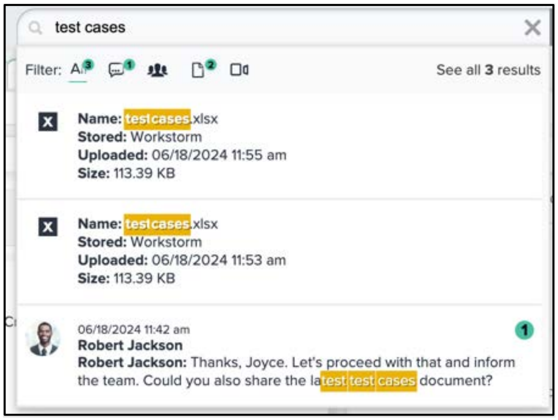
Global Search

Find messages, Channels & DMs, files and meetings using the search bar at the top-center of your app.

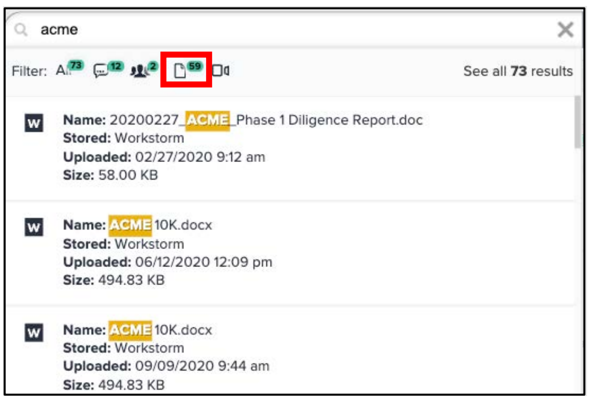
1. Click into the **Global Search** bar and enter a keyword to search your history across the platform



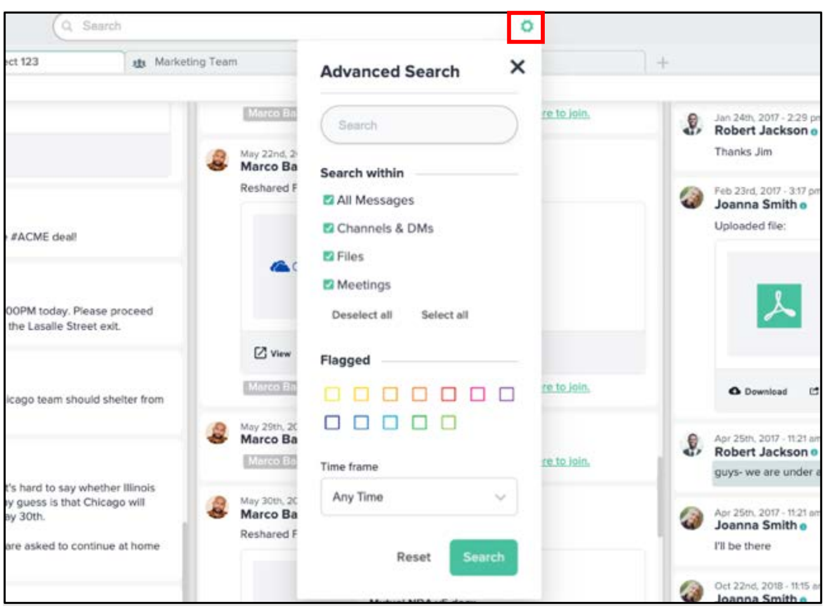
2. Search will display results matching the keyword across messages (direct message, channels, and announcements), files, and meetings to which you have access



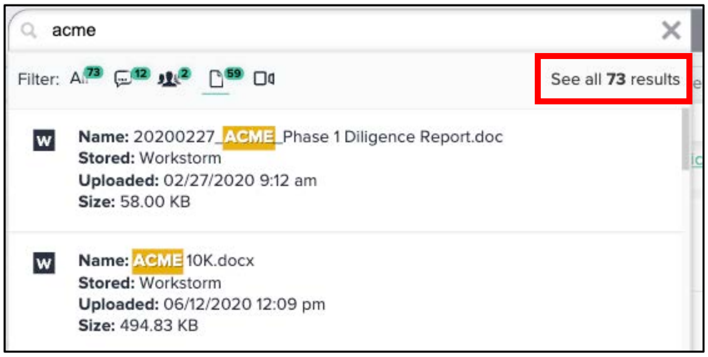
3. Filter by the type of result you're looking for with the tabs under the search bar



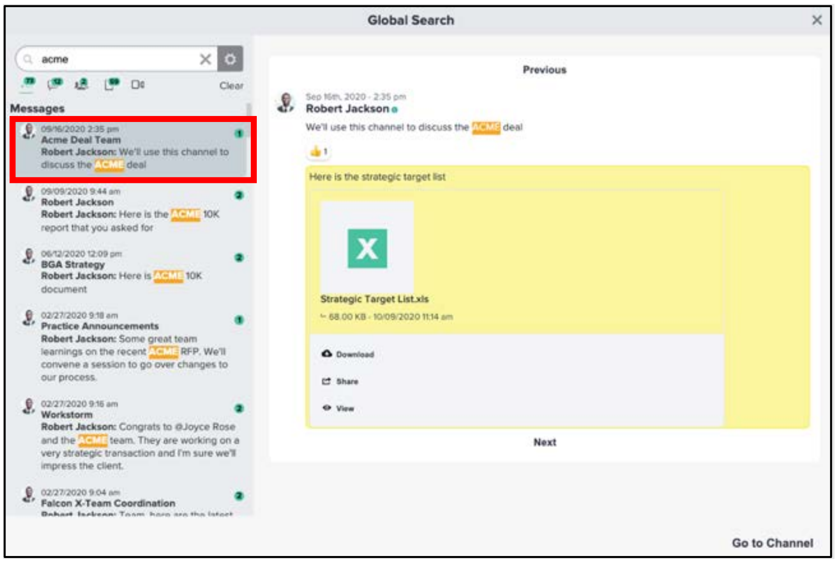
4. Click on the **Advanced Search** icon to the right of the search bar for more filtering options, like flag colors and timeframe



5. Click **See all results** to open an expanded version of Global Search

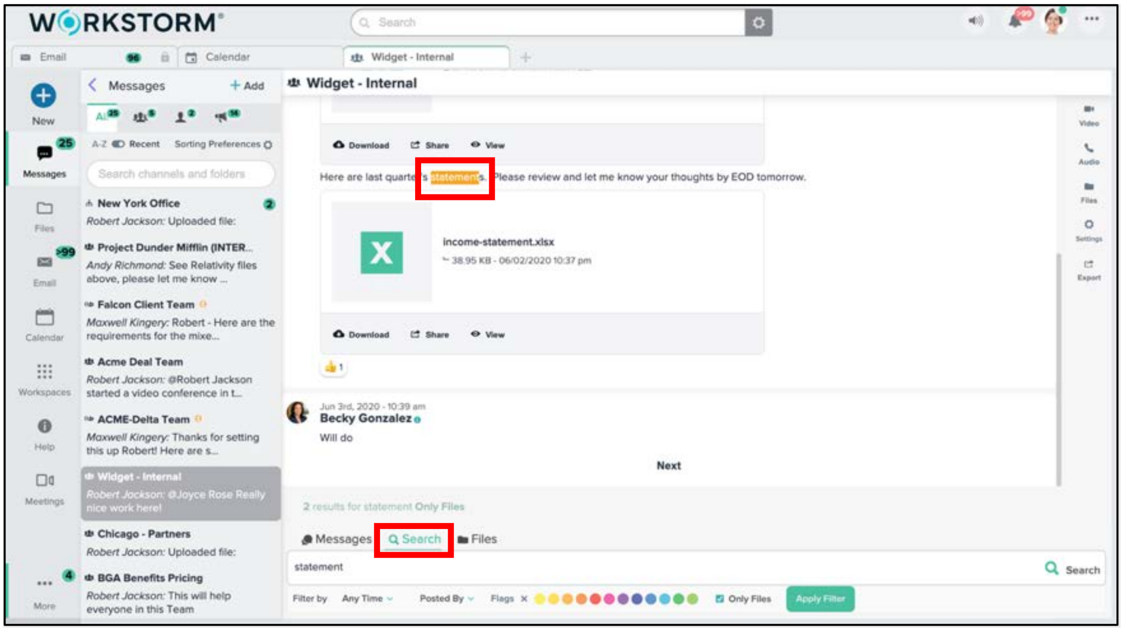


6. Preview different results by clicking on them in the *Global Search* pop-up screen



Local Search

1. Within a message, click **Search** above the message box
2. Type in keywords to search, then press **Enter** on your keyboard



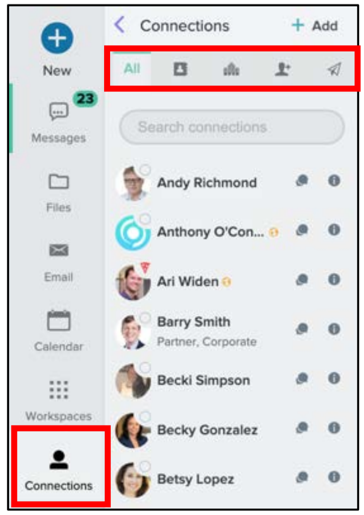
3. Refine search below the message box to filter by time, message sender, flag colors, or to only show files uploaded or shared in the conversation and click the green **Apply Filter** button

CONNECTIONS

Access an online registry of all members, including external connections, you're able to collaborate with on Workstorm.

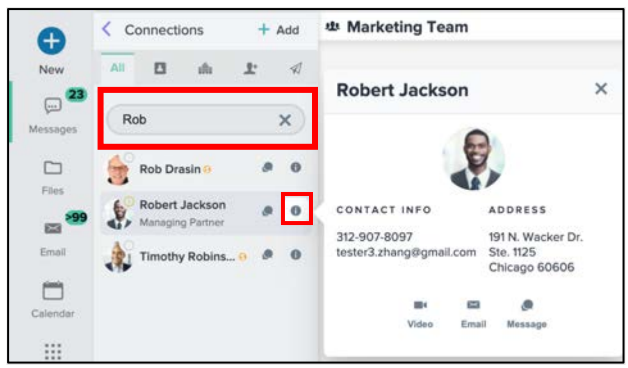
Search for a Connection

1. Search for a member's contact information by selecting the **Connections** icon from the left sidebar
2. At the top of the *Connections* menu, choose to view **All Connections**, **Your Connections**, or the **Company Directory**



3. Type the first few letters of a member's name in the search bar to find a specific connection
4. Click on the **User Information** button to the right of the connection's name to view their contact info, start a VC or jump into a DM

NOTE: Only the information the member has elected to include in his or her profile will appear as contact info.

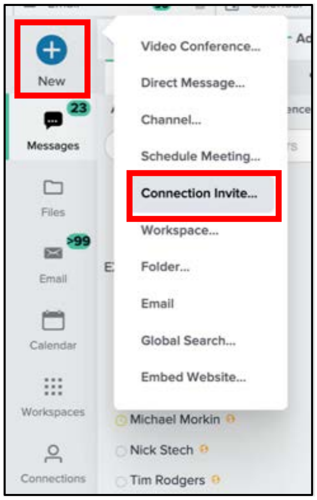


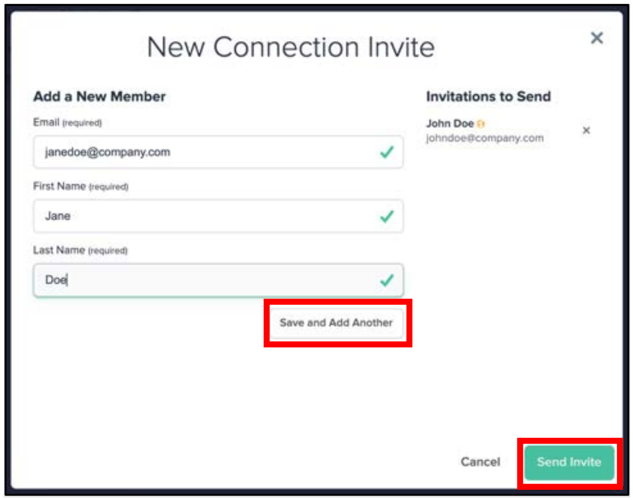
Add a New Connection

There are three ways to add a connection: email invite, personal connect link, and channel connect link.

Via an email invite:

1. From the **New+** menu, click **Connection Invite**

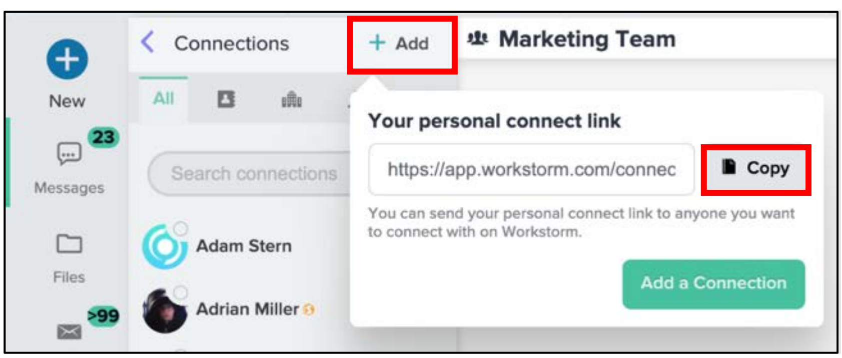




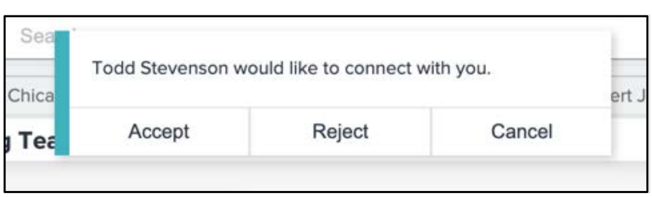
2. Add your connection's email and name
    a. If multiple invites are needed, select **Save and Add Another**
3. Click the green **Send Invite** button

Via a personal connect link:

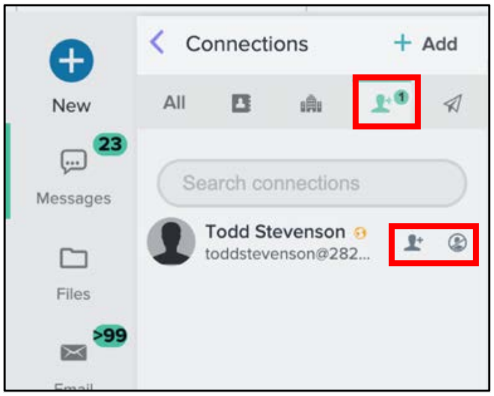
1. Click on **Connections** from the left sidebar
2. Click the **+Add** button on the top right of the *Connections* menu



3. Copy your personal connect link and send it out to a colleague you want to connect with on Workstorm
4. Once the invited user has completed their Workstorm sign-up using the sent connection link, you will receive a toast to **Approve** or **Reject** the connection request



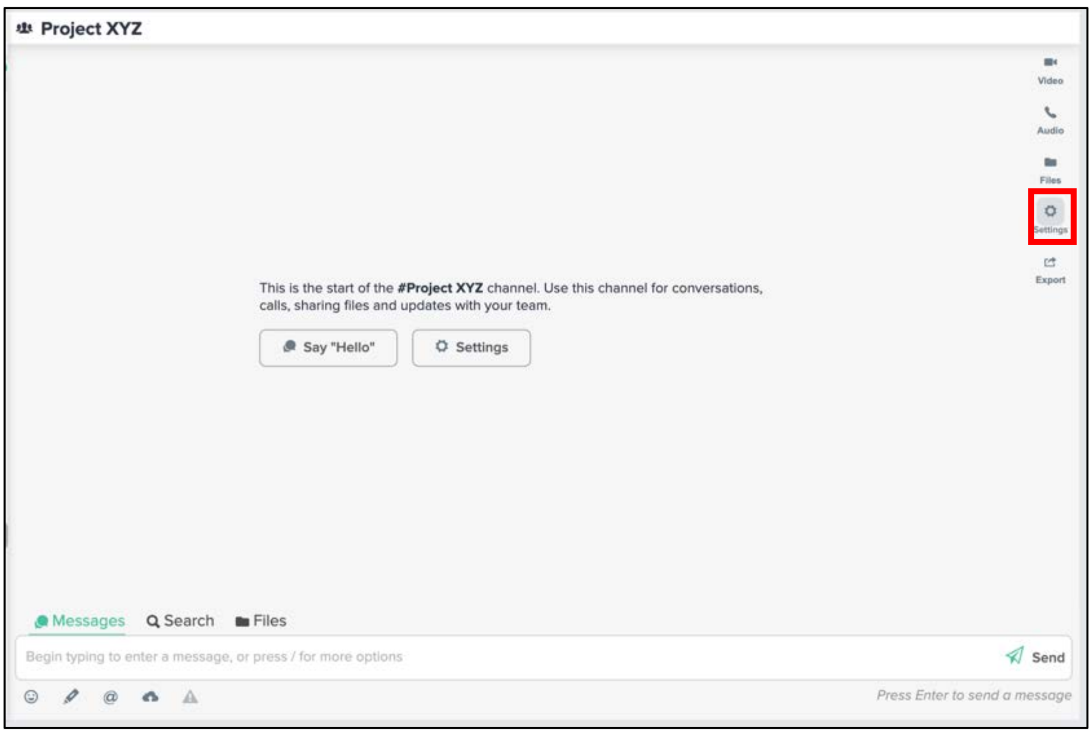
5. You may also view the request in the **Pending Connections** section of the Connections menu



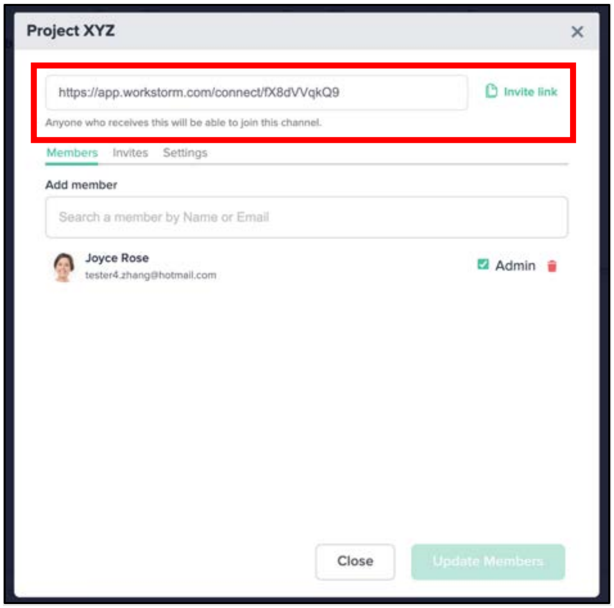
6. If you approve the connection request, you can start sending messages, sharing files and collaborating with your new connection

As a *Channel Admin* on Workstorm, you can send the channel's connect link to a colleague to add them as a member of that Channel:

1. In a Channel, click on the **Settings** icon from the toolbar on the right



2. Copy and send the channel invite link at the top of the pop-up screen to the colleague you want to add to the channel

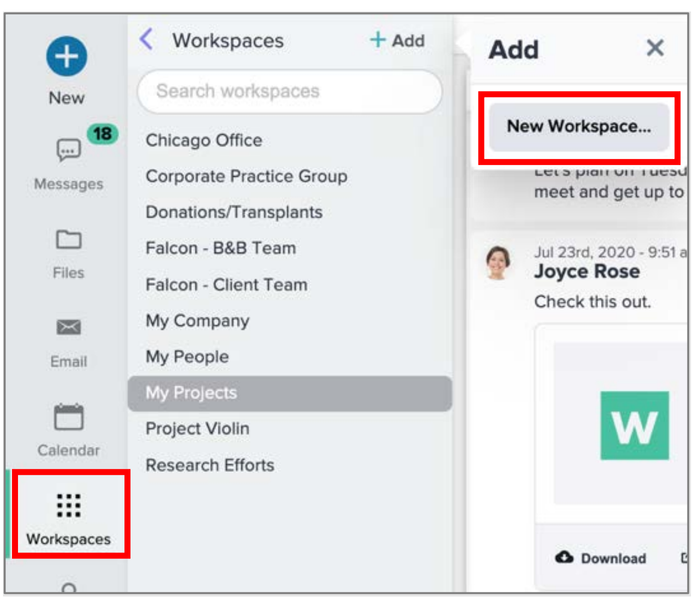


SPECIAL FEATURES

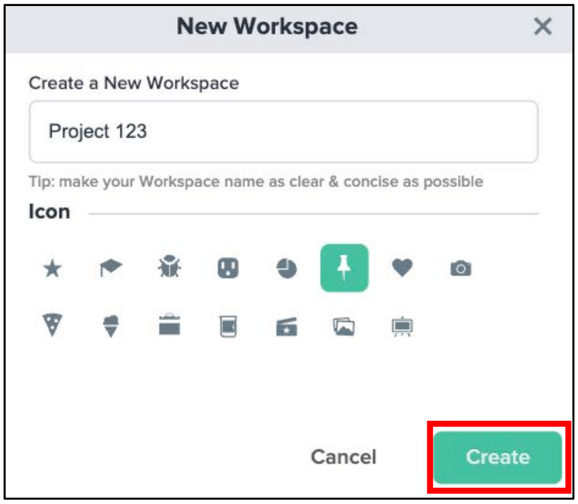
Workspaces

Organize multiple conversations into project dashboards called *Workspaces* that allow you to interact with multiple conversations all on one screen.

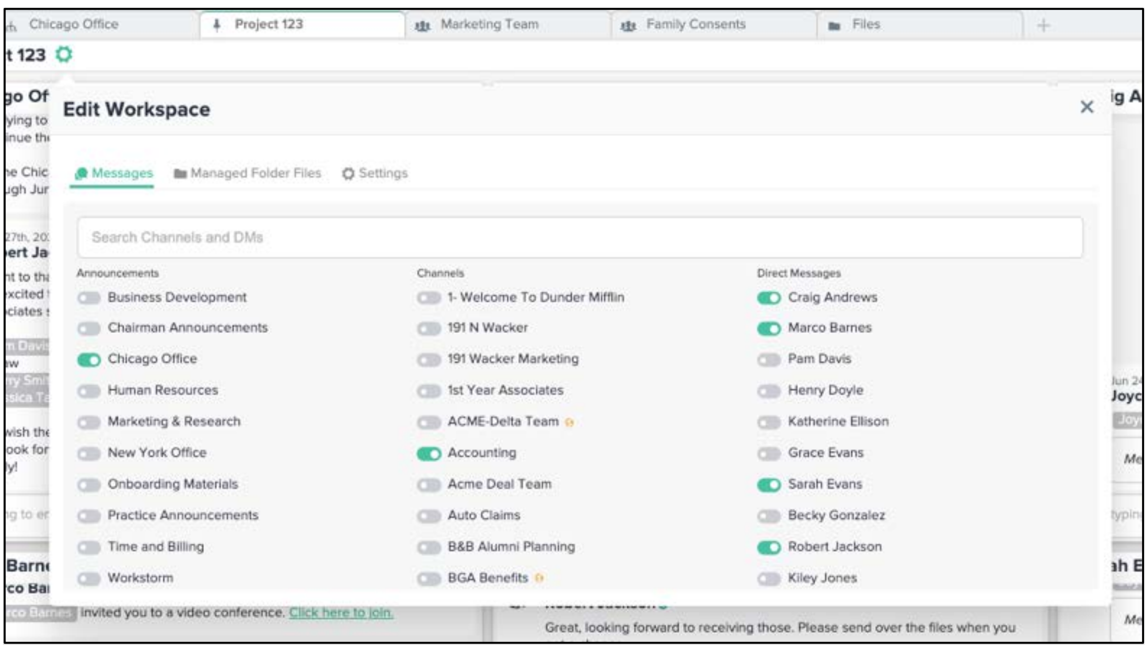
1. Click the **Workspaces** icon from the left sidebar
2. Click the **+Add** button at the top right of the *Workspaces* menu
3. Choose **New Workspace**



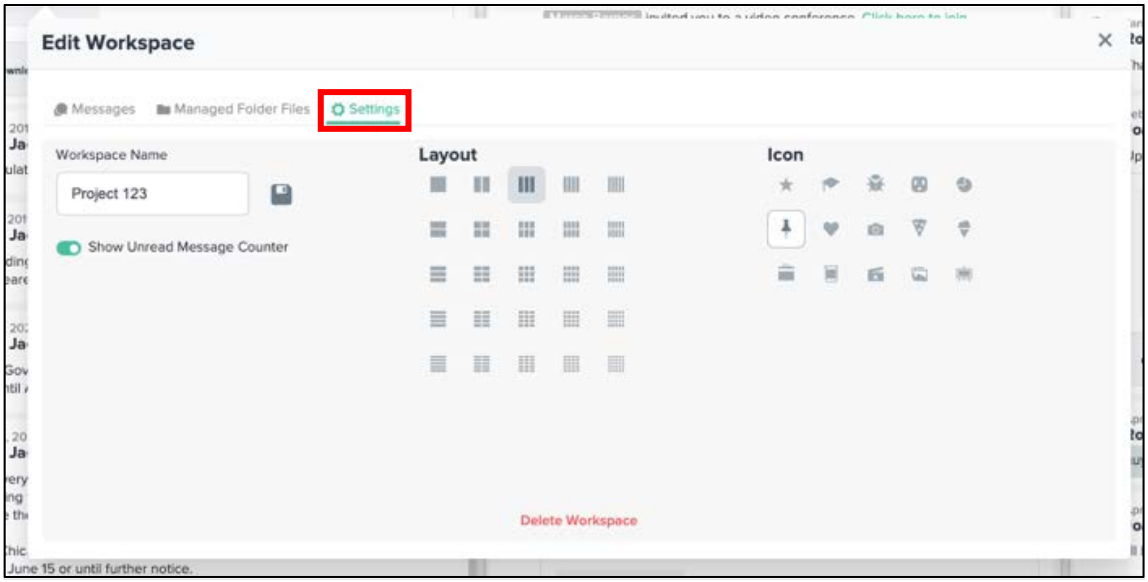
4. In the *New Workspace* pop-up screen, designate a Workspace name and select an icon to represent it
5. Select the green **Create** button



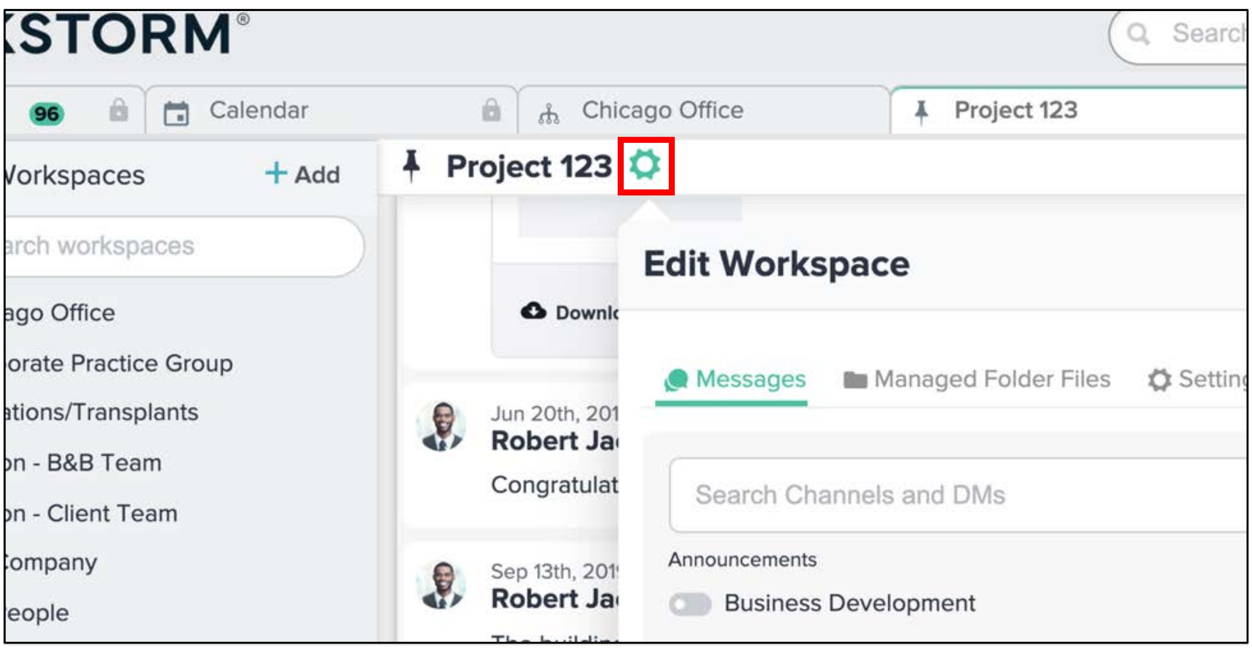
6. Add conversations to your workspace in the *Edit Workspace* pop-up screen as desired



7. Click over to the **Settings** tab in the pop-up screen to adjust your Workspace settings as desired
    a. Rename, adjust layout, change icon, or choose to delete the Workspace



8. After your Workspace is set up, you can always return to this screen to make changes by clicking on the green **Settings** icon next to the Workspace name



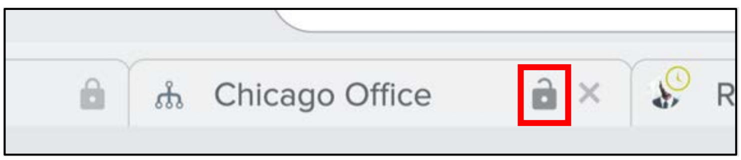
Tabs

Tabs allow users to organize and quickly switch between multiple conversations and/or features. You can create new tabs for:

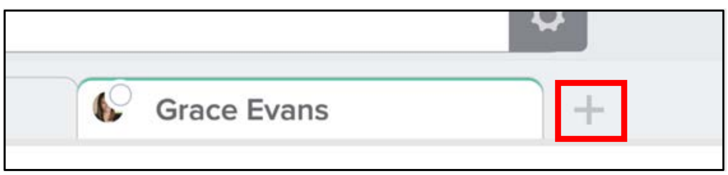
- *DMs* and *Channels*
- Workstorm's DMS and/or an integrated DMS
- *Calendar* and/or *Email*
- *Divisions* and/or *Company Announcement Channels*
- *Workspaces*

If you hover over an existing unlocked tab or new tab you will see a **Lock** icon. Click the **Lock** icon to lock your tab in place. Locked tabs will stay pinned in the location you've chosen unless you unlock the tab. Unlock a tab by clicking the **Lock** icon again.

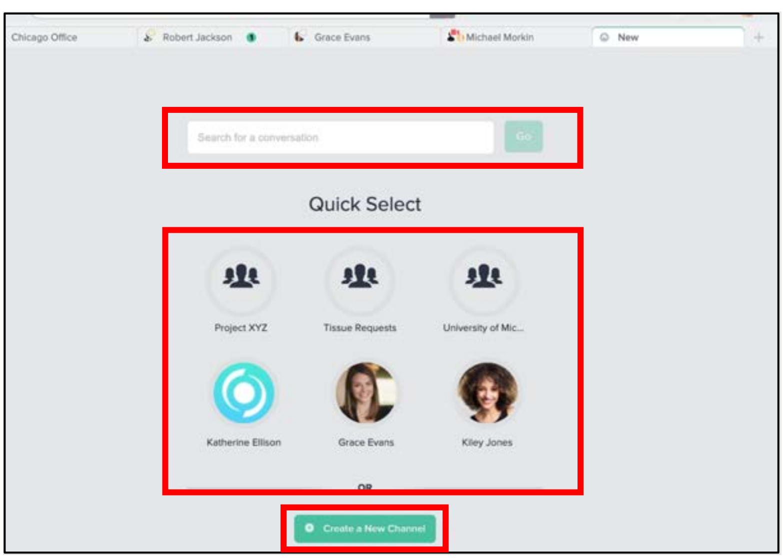
*NOTE: If the tab is unlocked, it will be replaced by the next conversation or feature that you select. You can further customize your tab preferences in **Settings** > **Display**.*



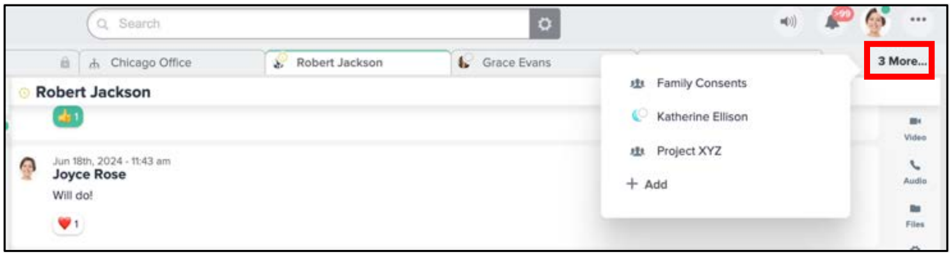
To add additional tabs, click on the **Plus** icon to the right of the tabs.



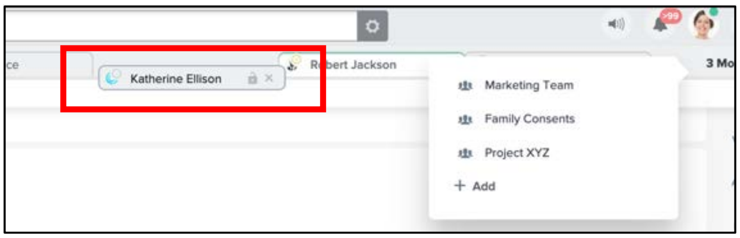
Upon adding a new tab, a *Quick Select* menu will appear. This menu provides options to open most recently used conversations in this new tab. You can also search for a conversation or create a new channel.



If you lock more tabs than will fit in the top bar, an overflow menu will appear. Click on **More** to access your additional tabs that you can lock in place, if necessary.



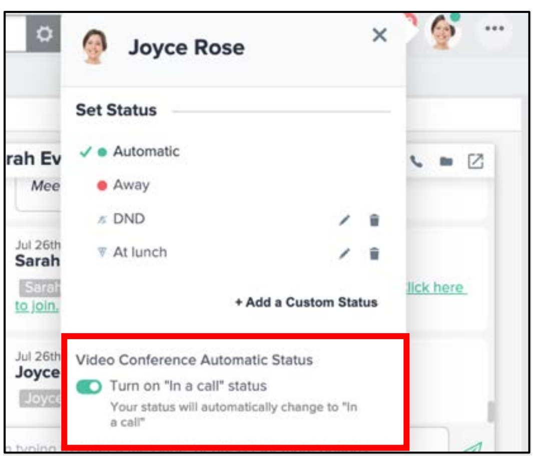
Tabs in the top bar and the **More** overflow menu can be dragged and ordered to your preference. Just hover over the tab with your mouse, then click and drag the tab to the desired location.



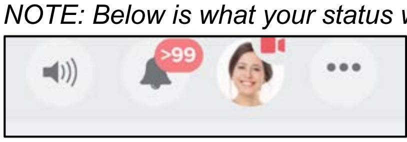
Custom Status

Keep your colleagues updated on your status and add custom statuses, like *Out to Lunch* or *Commuting*. By default, there are two status options: *Automatic* and *Away*. To change your status:

1. Click on your profile photo in the top right corner to pull up the *Status* menu
2. Click on an available status to activate it
3. Toggle **Video Conference Automatic Status**, which is enabled by default, to automatically change your status when you are in a call



NOTE: Below is what your status will show when in a call while this is enabled.



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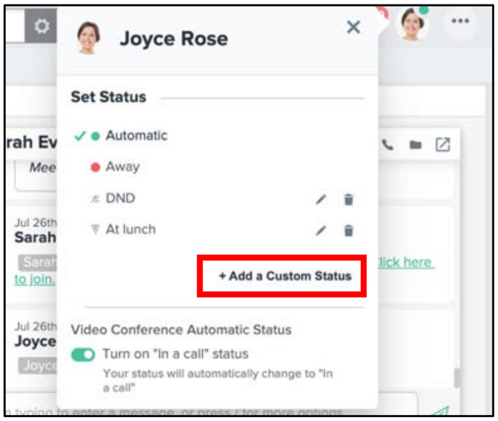
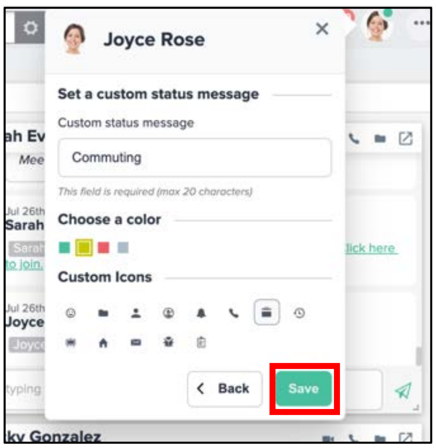
4. Click on **Add a Custom Status** to create a personalized status option

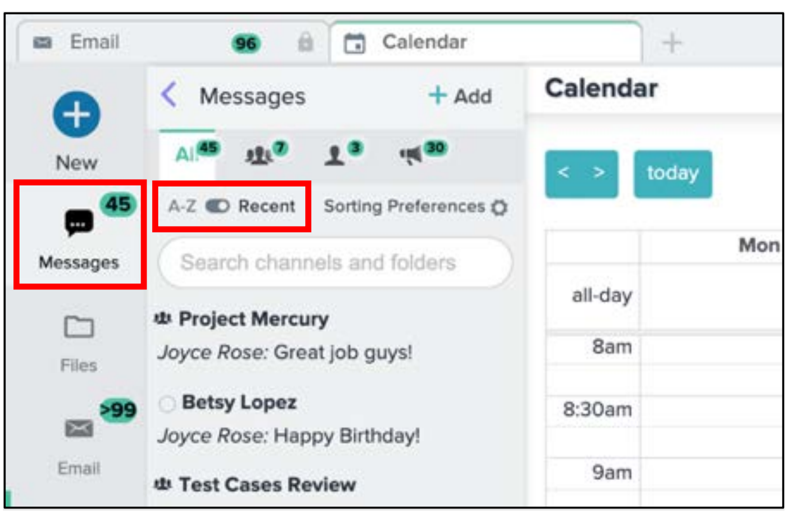


5. Create a custom status by giving it a status name, icon color, and icon
6. Click the green **Save** button when finished



Recent

1. To view recent messaging activity and notifications, click **Messages** in the left sidebar
2. At the top of the *Messages* menu, toggle to **Recent**



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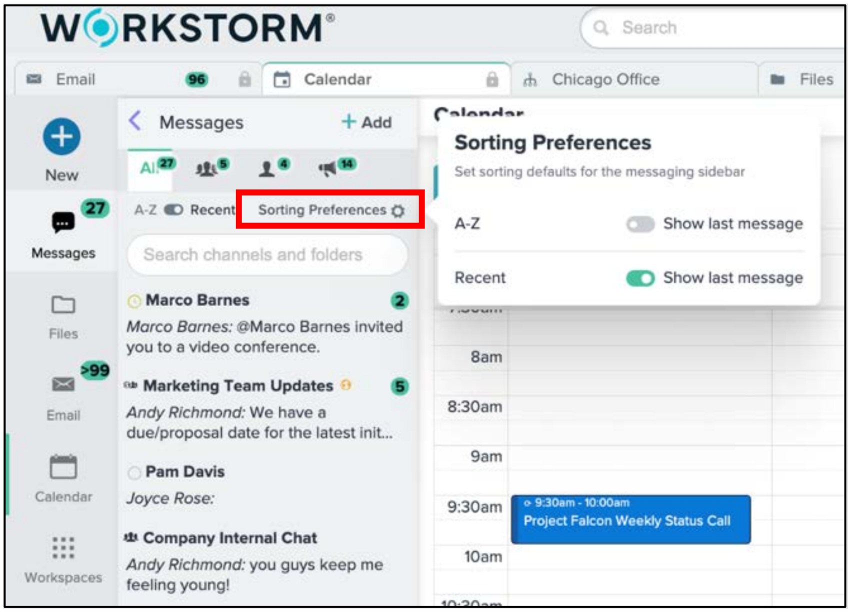
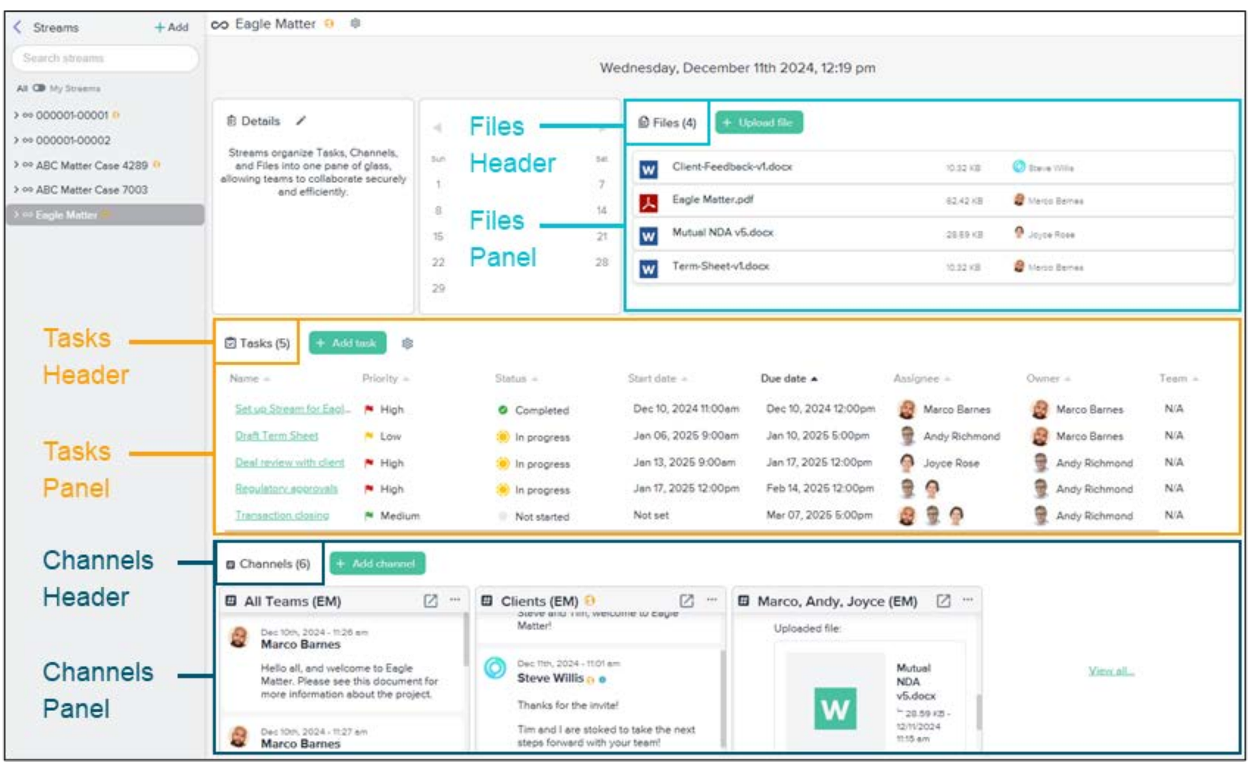
3. Click on **Sorting Preferences** to set sorting defaults for your messages



STREAMS

A Stream is a unified dashboard designed to help manage projects and matters. They organize Tasks, Channels, and Files into one pane of glass, allowing teams to collaborate securely and efficiently.

To enable the Streams feature, please contact your account representative.



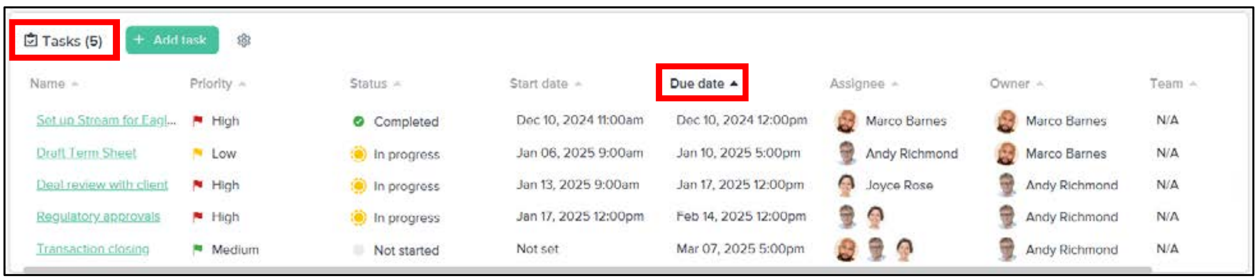
Using Tasks

Any member of a Stream can create and manage their own Tasks, as well as assign other members as Assignees and Watchers of those Tasks. Please see the following table for a breakdown of Task permissions:

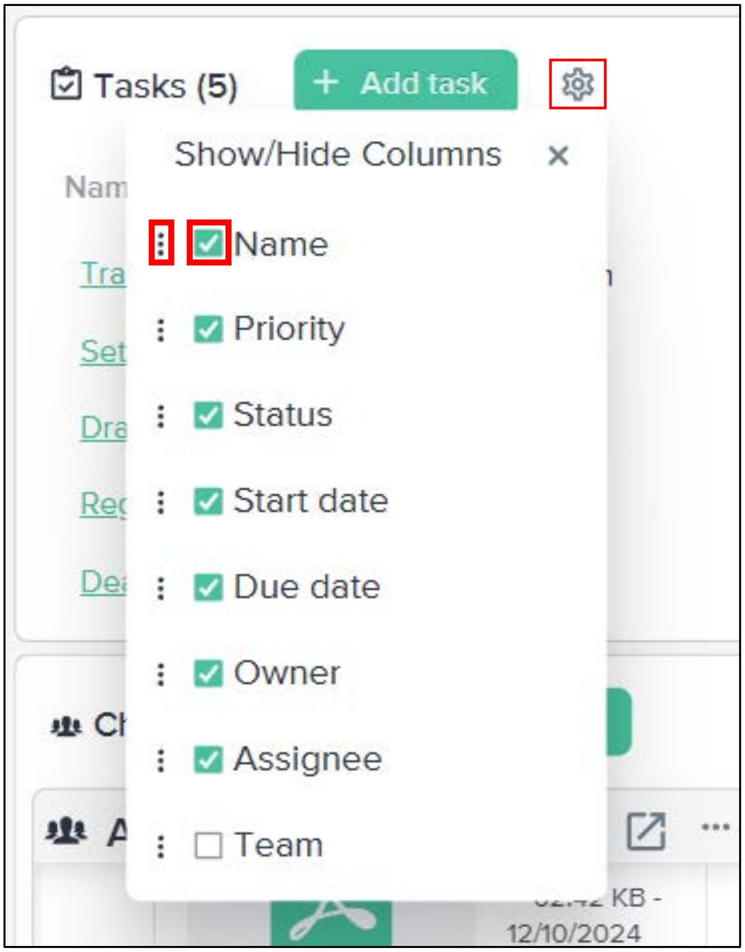
Role	Description	Access
Stream Admin	Manages a specific Stream	Can view and edit details of all Tasks in the Stream
Task Owner	Created the Task	Can view and edit Task details
Task Assignee	Assigned to the Task	Can view and edit Task details
Task Watcher	Granted visibility on the Task	Can view Task details, but cannot edit them

Tasks Panel

The *Tasks panel* provides a brief overview of tasks you have permission to view or edit in a Stream and displays the top tasks with approaching due dates. Click on the **Tasks header** to open the full *Tasks* dashboard. Select each column header to sort *Tasks* by the ascending or descending values in that column.

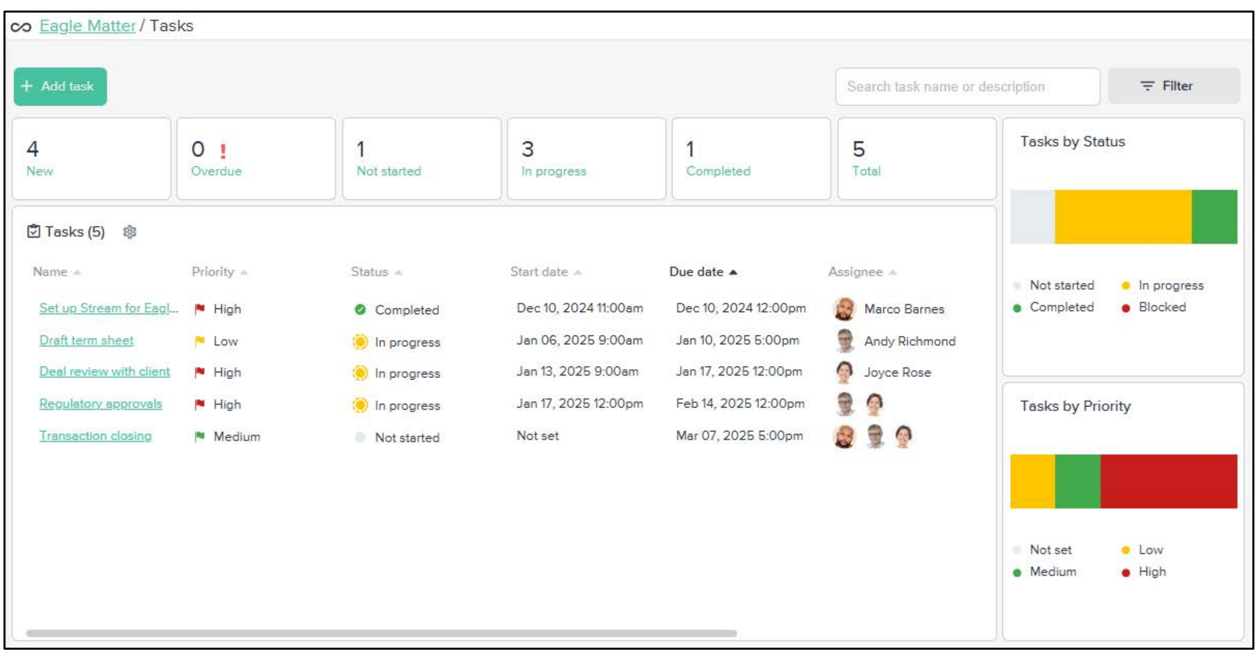


Additionally, select the **Settings** gear icon beside the **Tasks header** to reorganize your Tasks. Check or uncheck boxes to show or hide the columns. Click and drag the **ellipsis** to the left of each name to change the order of columns.

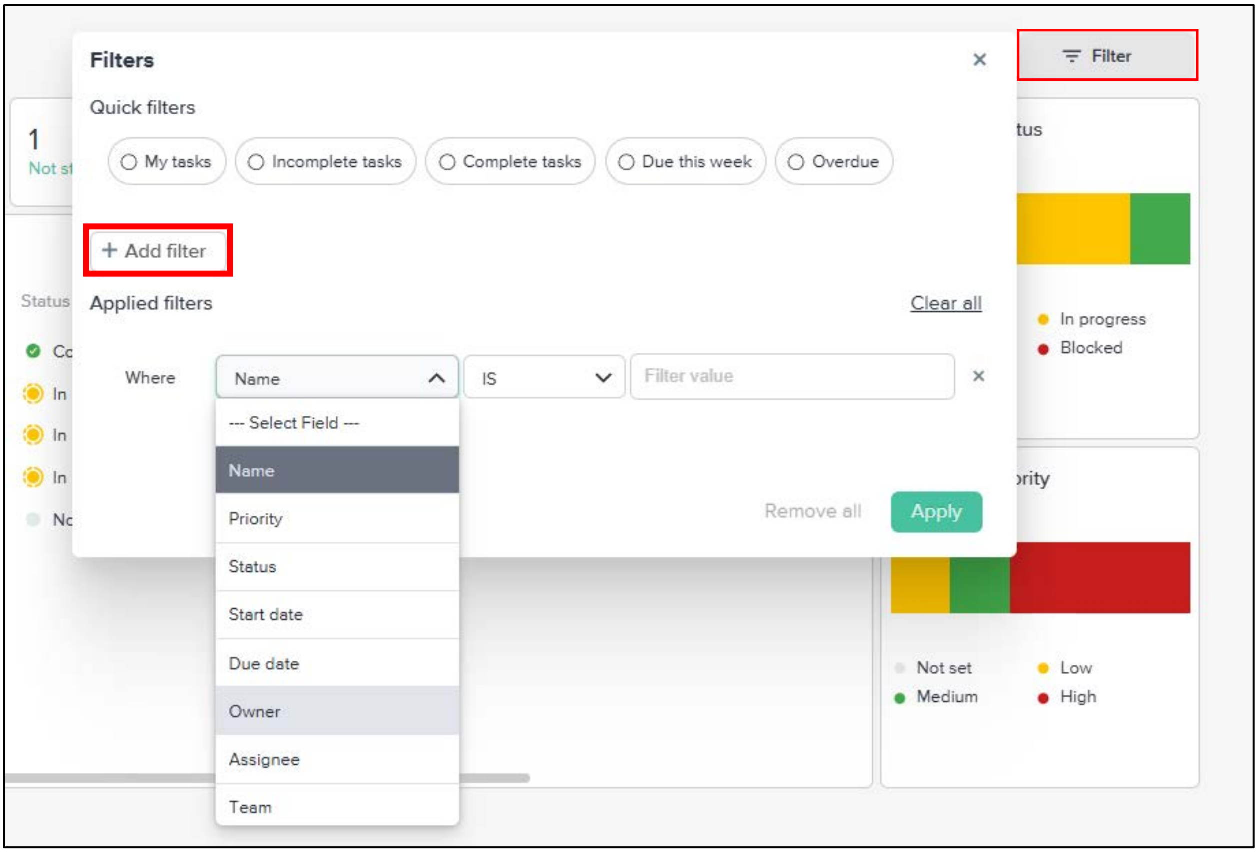


Tasks Dashboard

The *Tasks dashboard* provides a detailed view of all tasks you have permission to view or edit in a Stream.



In addition to sorting and restructuring columns, members of a Stream can also filter tasks by specific field value. Select from the list of *Quick Filters* provided, or click **+Add Filte**r to create your own.

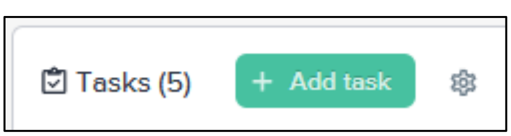


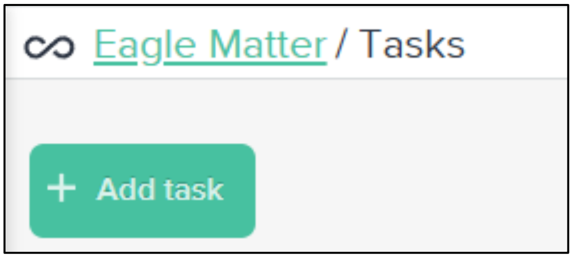
Creating a Task

There are several different places a Stream member can quickly create a Task:

- **Streams Sidebar:** Quickly create a task from anywhere in the platform.

- **Tasks Panel and Dashboard:** Click the +Add Task button to quickly create a new task, straight from the panel or dashboard.

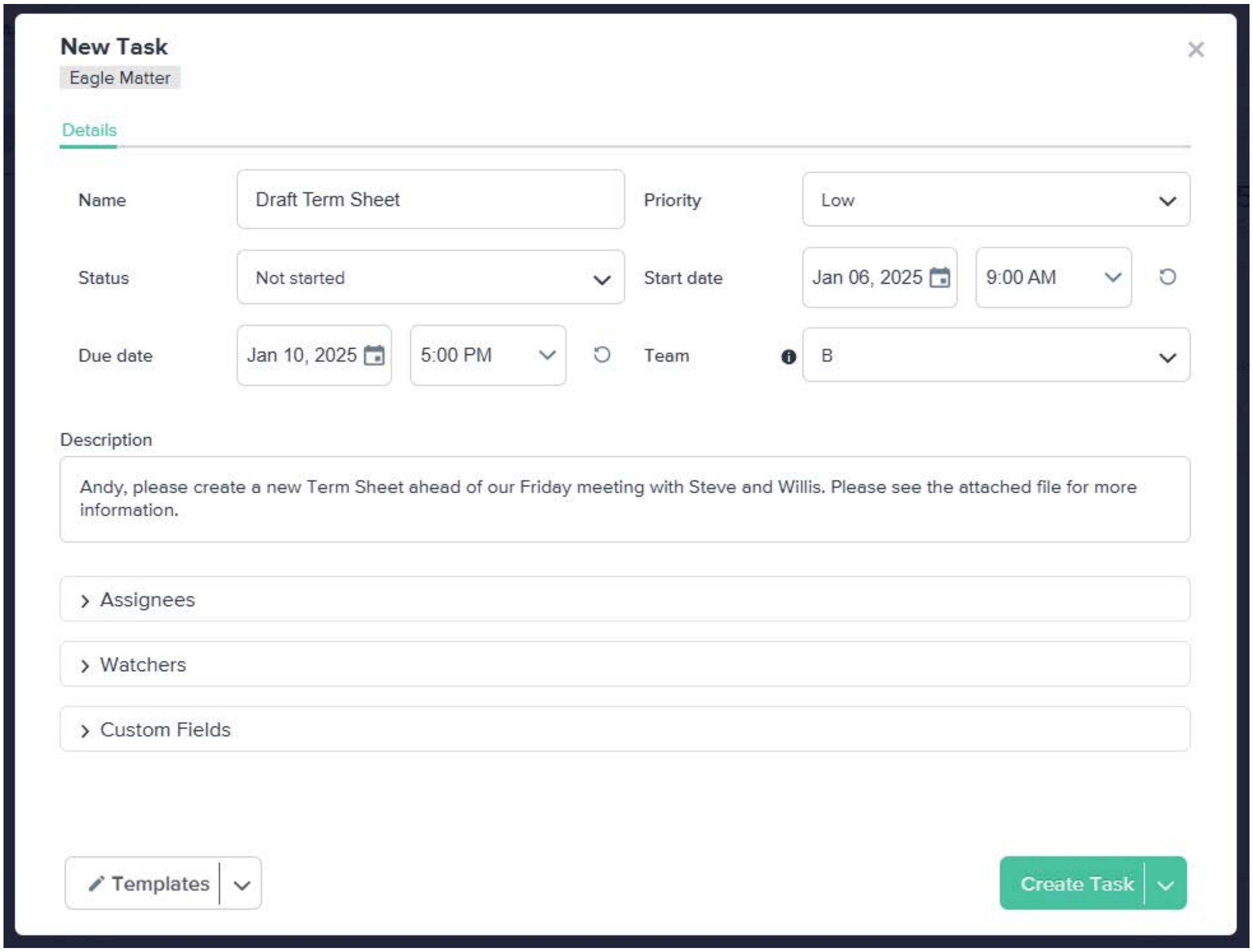




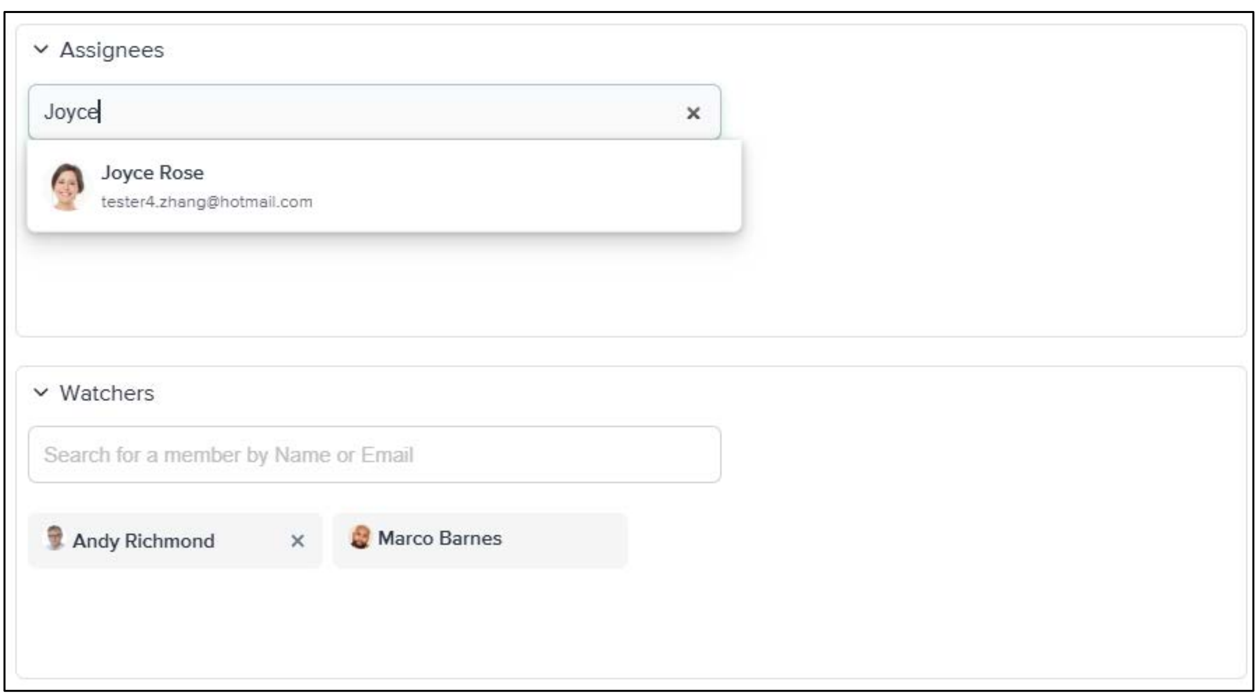
Task Details

In the *New Task* pop-up, members of a Stream may enter the following information:

- Name
- Priority (Not Set, Low, Medium, or High)
- Status (Not Started, In Progress, Completed, or Blocked)
- Start and Due Date and Time
- Required Custom Fields
- Description
- Assignee(s)
- Watcher(s)
- Non-required Custom Fields

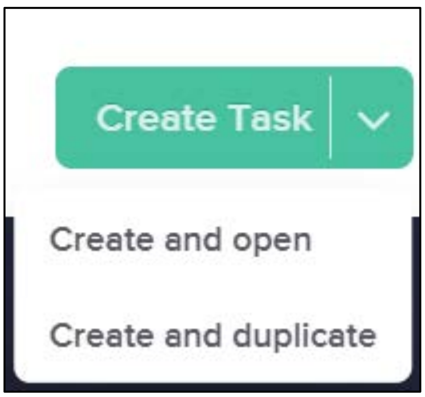


To add Assignees and Watchers to the task, input the name of a Stream member into the search box and select the corresponding name.



If there are additional custom fields to add, open the *Custom Fields* dropdown, select the relevant field, and assign a value.

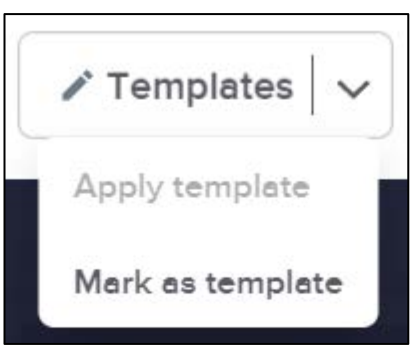
When finished entering task details, click the green **Create Task** button. You may also click the dropdown to reopen the task immediately or duplicate it.



Using Templates

Templates streamline the creation and organization of similar or duplicate Tasks. To create a template from an existing task:

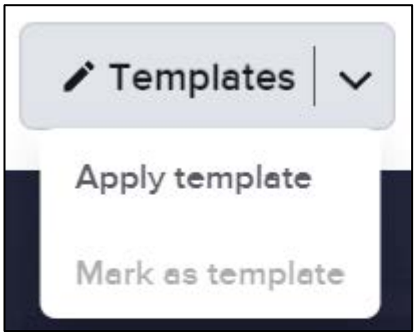
1. In the panel or dashboard, open the task from which you would like to make the Template.
2. In the *Task Details* pop-up window, click on the Templates drop-down in the bottom-left corner.
3. Click **Mark as Template**.



4. Name the template and click **Save as Template**.

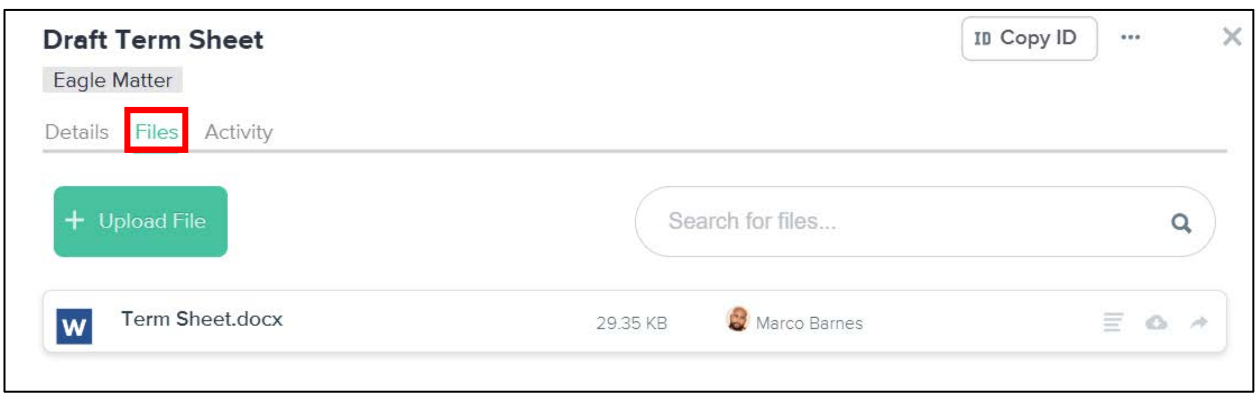
To apply a template to a new task:

1. Click the **+Add Task** button.
2. In the bottom-left of the *New Task* pop-up, click on the *Templates* drop-down.
3. Click **Apply Template** and select one from the list provided.



Task Files and Activity

After creating a new task, the Owner, Assignees, and Watchers can upload files via the *Files* tab of the task pop-up. Files uploaded to a task appear both in the *Files* tab and in the *Streams File repository*, where they are accessible only by the aforementioned users.



Additionally, users can review past actions in a task, as well as send messages, via the *Activity* tab of the task pop-up.

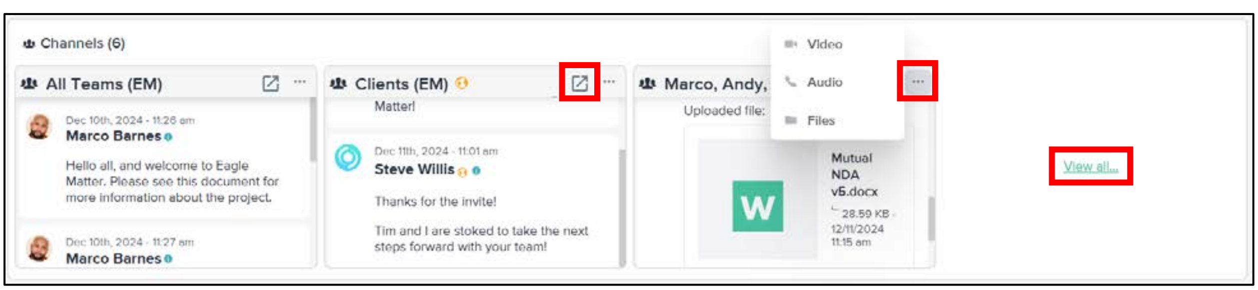
Using Channels

Members of a Stream can only view the Stream Channels to which they are added.

Channels Panel

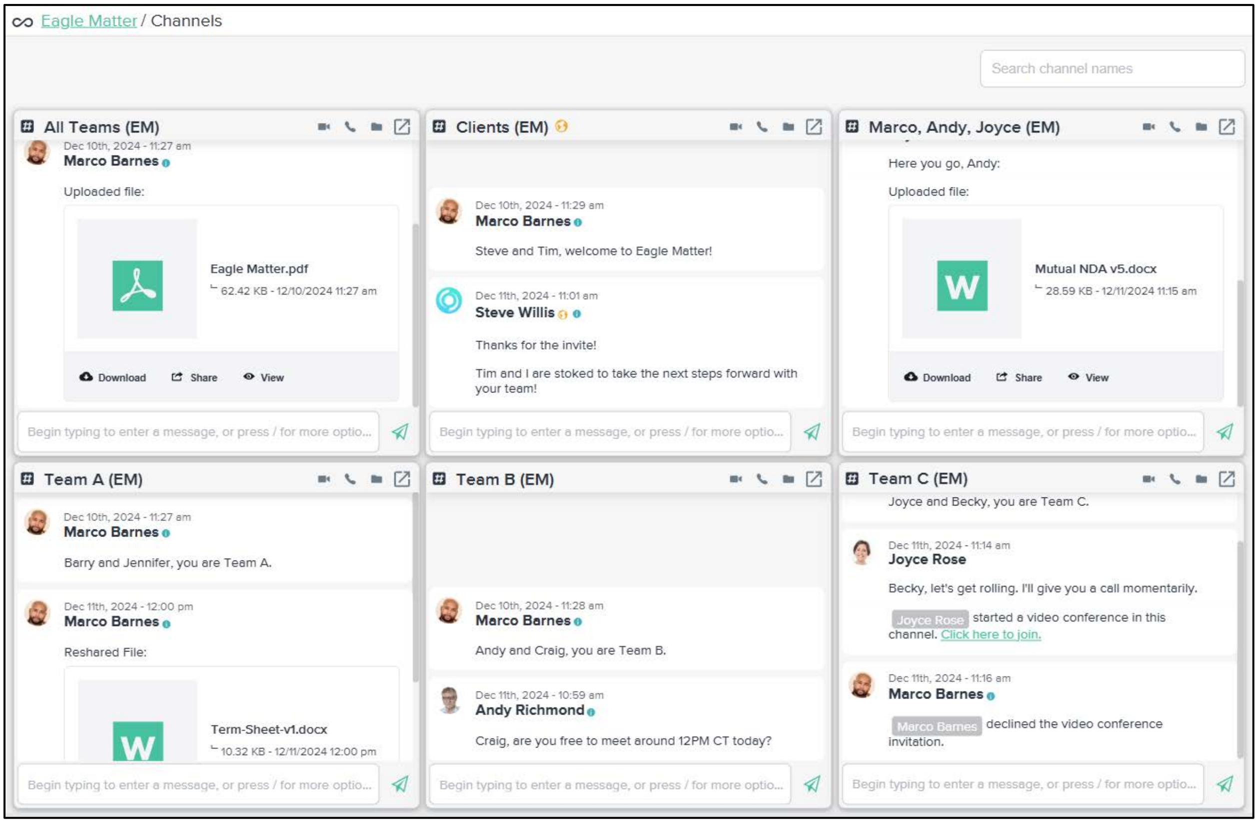
The *Channels panel* provides a view of recent activity in your Stream Channels. Click on the pop-out icon to open the Channel in a new tab, or the ellipsis to quickly start a call and view files.

Click on the **Channels header** to open the full *Channels dashboard*. Depending on the number of Channels in the dashboard, you can also click **Go to Channels** or **View all** on the right side of the panel.



Channels Dashboard

Once you open the full *Channels dashboard*, you can send messages, start a video conference, and share files as normal. For more information on how to use Channels, click here.



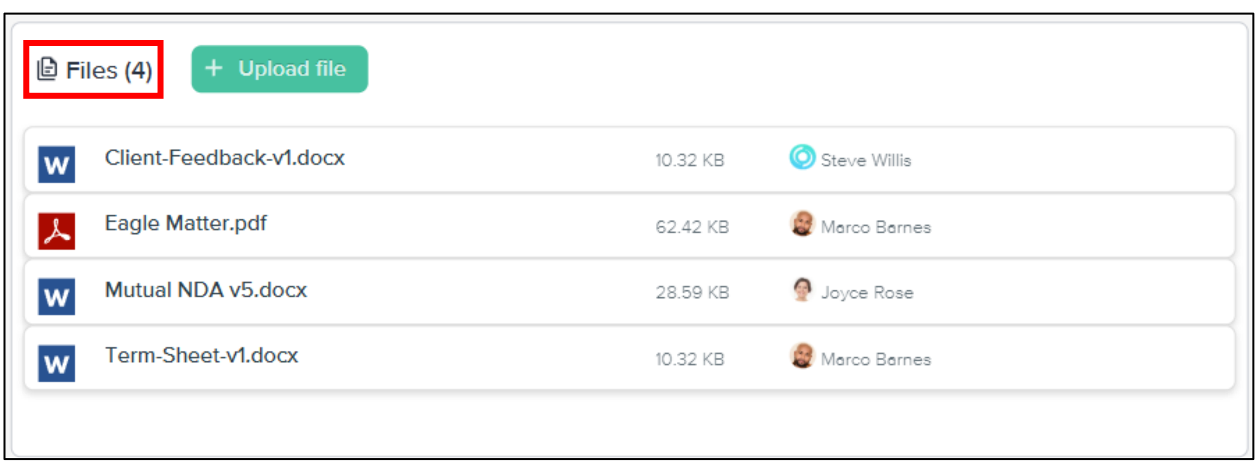
Using Files

Members of a Stream may view all Files shared via one of the following methods:

- Shared within a Stream Channel, of which they are a member
- Uploaded to a task, of which they are an Owner, Assignee, or Watcher
- Uploaded directly to the *Files panel* or *dashboard* by any Stream member

Files Panel

The *Files panel* provides a view of all accessible files in a Stream. Click on a file to preview it and access the *Full View*, *Download*, *Reshare*, and *Delete* options. Click on the **Files header** to open the full *Files dashboard.*



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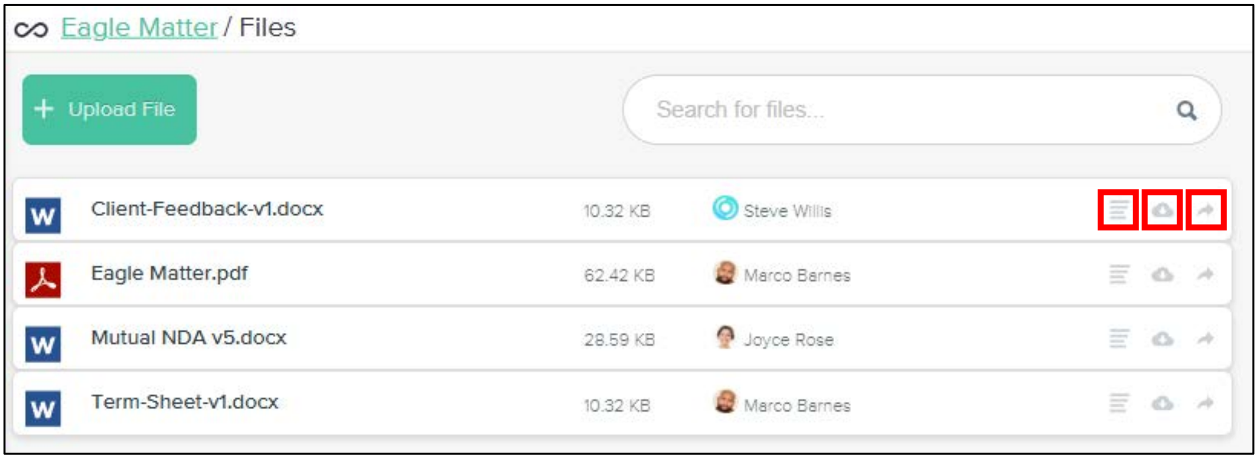
Files Dashboard

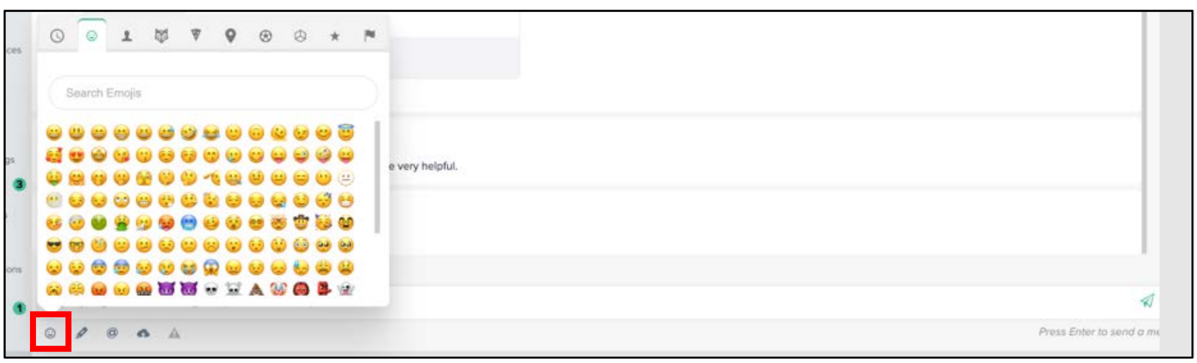
In the *Files dashboard*, search the repository for files shared with you in the Stream. Click on a file to preview and view the full range of options, or quickly click on the icons to the right to *Preview*, *Download*, or *Reshare*.



SUPPLEMENTAL FEATURES

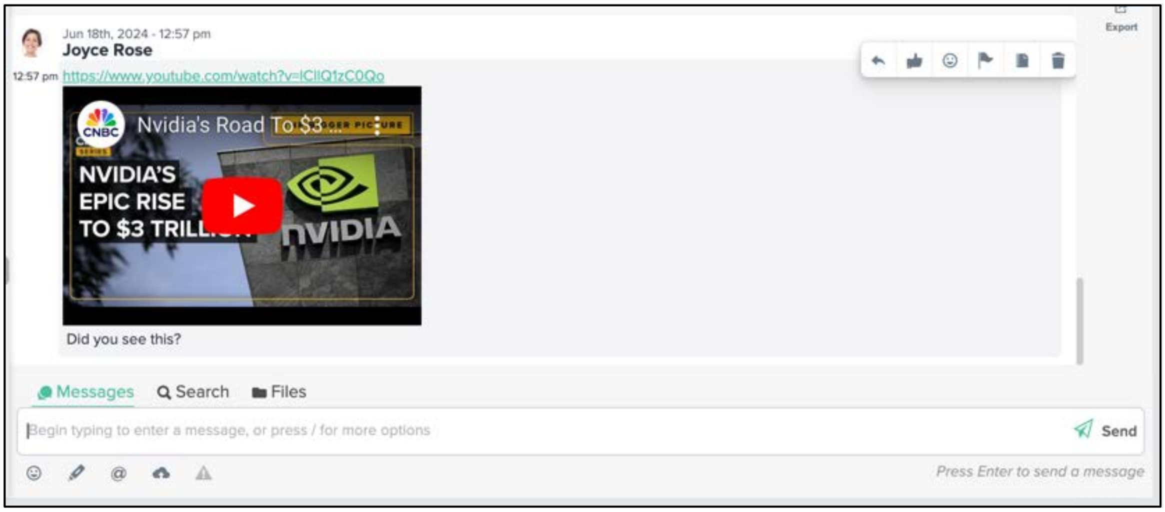
Emojis

Add Emojis to your messages to convey tone or emotion. Select the **Emoji** icon below the message bar to select an Emoji, or type ":" and a keyword for a list of suggested Emojis.



YouTube

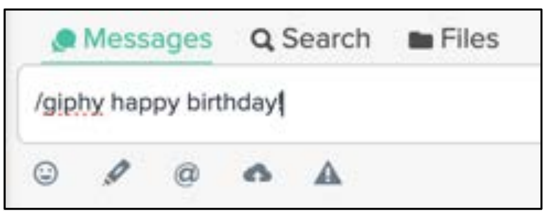
Embed YouTube videos in your conversations by copying and pasting the URL into the message box.



GIPHYs

To embed GIPHYs in your conversations:

1. Type “/” and select the GIPHY pop-up above the message box
2. Then type the word you wish to convey in an animated image and press **Enter** on your keyboard



DESKTOP & MOBILE DOWNLOADS

Desktop App

Access Workstorm via the **desktop app** for Mac, Windows, and Linux.

Mobile App

Send and receive messages and files on the go by downloading the mobile app for Apple or Android. Once downloaded, adjust notifications so you never miss an alert.