Manual for using stashcat

VERSION 5.15

DESKTOP CLIENT

WEB CLIENT

Android

iOS

Web and Desktop Client

Organisation Settings

Android

App installation

1. Download the app for free from the Google Play Store and install the app on your Android device. Type „stashcat" in the Google Play search box to find the app faster.

   Note: *If the installation from the Android Playstore is not possible, please check the system requirements. At least Android 7 is required for installation. Older operating systems are no longer supported. If the installation is further not possible, please contact the administration to check the organizational guidelines for the installation of applications on mobile devices (Mobile Device Management).*

2. After installation, open the app screen on your Android device and type „stashcat" in the search box. Press the logo to launch the app.

Account activation

Using a 10-digit registration key

1. To register your account, open the app and click on „Enter registration key".
2. Enter your 10-digit registration key.
3. After you have entered your registration key, you can you specify your e-mail address and password as well as your first and last name. Your account will be created by tapping on „Create account".

Using a 29-digit registration key

1. To register your account, open the app and click on „No account yet".
2. Enter your 29-digit registration key.
3. After you have entered your registration key, you can specify your email address and password. Your account is now active.

1 No account yet

2 registration key

3 Email

Password

Using an email link
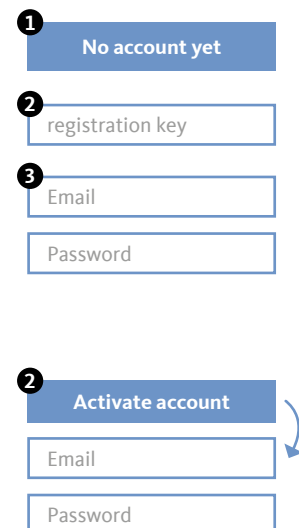
1. You have received an email from your organisation that allows you to register your account with just one click.
2. To do this, tap on „Activate account" in the email. A selection of apps appears with which you can open the link. Open the link with the app. Please do not open the link with the browser app on your smartphone. Enter your email address and password. Your account is now active.

Note: *Please check your spam folder.*

2 Activate account

Email

Password

Android

Log in

1. Open the app.
2. Enter your e-mail address, confirm it the first time you login and press „Continue".
3. Enter your password and tap „Log in" to log in.
4. When you log in to the app for the first time you have to set an encryption password first.

Attention: Please write down the encryption password and keep it in a secure place. If you forget the encryption password, you can reset it. In this case, you will have to retransmit the key once for all existing encrypted conversations.

① Email address

CONTINUE

② Password

LOG IN

Encryption method

Communication is encrypted end-to-end to ensure optimal protection of your data. You have several options for encrypting the app.

① By another device

② Allow

③ 1 | 2 | 3 | 4 | 5 | 6

1 | 2 | 3 | | |

Activation using another device

If you are already logged in with a device, you can use it to activate the new device. Make sure you have the latest version installed and have the device on hand.

1. Log in and select the option, „Using another device".
2. On the already activated device, give your consent that the device may be used for activation.
3. Enter the displayed 6-digit code on your Android device.

Activation by entering your encryption password

1. Log in and select the option „Using your encryption password".
2. Enter your encryption password.
3. Press „DECRYPT".

① With your encryption password

② Your password

③ DECRYPT

Did you forget your encryption password?

If you have forgotten your encryption password, you can assign a new encryption password.

1. Log in and select the option, „Forgot your encryption password?".
2. Enter a new encryption password and then enter it again.
3. Press „RESET".

① Forgot your encryption passwort?

② Password

Repeat password

③ RESET

Add user

There are two types of registration keys:

1. The 10-digit, non-personalized key.

If you have the appropriate authorization, you will find the item "Invite user" in the settings. By tapping on "Invite user" you will get an overview of your created registration keys. Here you can delete your created keys and see who has used your key. Via the plus you can create a new registration key.

Note: Since the 10-digit keys are not personalized, they can be used several times. After entering the key, users must enter their personal data themselves.

2. The 29-digit, personalized key.

The creation of 29-digit, personalized keys is only available for administrators and therefore only in the desktop and web client. The first and last name of the user is fixed and cannot be edited by the user himself. For more information on creating 29-digit keys, see the Organization Settings section.

Extend Organizational Membership

If an expiration date has been stored for the users, they can extend their organizational membership with a 10-digit, non-personalized key. The 10-digit registration key can be created by users with the appropriate authorization (see *Adding Users*).

To extend your own organisation membership, tap on „Companies" in the settings. Tap on the organisation for which you want to renew your account, tap on „Renew Membership" and enter your new renewal key here.

Note: In addition to the new expiration date, the role stored in the 10-digit key is also taken over for the user.
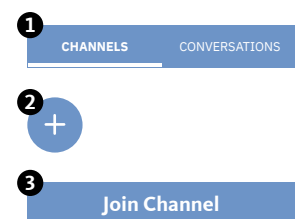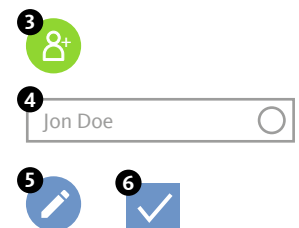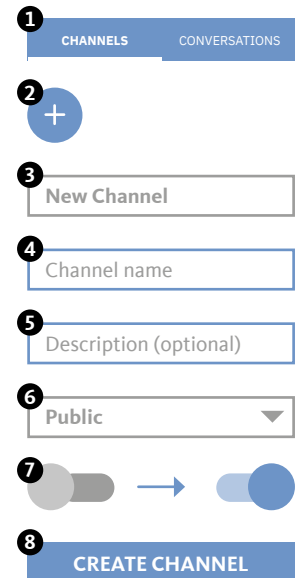
Channels

Create a Channel

1. Open the navigation via the "Menu" icon at the top left. Select "Chats" and then tap on the "CHANNELS" tab.
2. Press the „plus" icon in the lower right corner.
3. Select „New Channel".
4. Give the Channel an appropriate name.
5. You can add a description for the Channel.
6. Choose a Channel type:
   • Public Channels are accessible to every user.
   • For password protected channels, the user must enter the correct password or be invited to the channel. If a user is invited, they do not have to enter the password.
   • Encrypted channels can only be entered by invitation by a member of the channel. A user can still submit a membership request, which must be confirmed by a channel member. Encrypted channels can also be hidden so that they cannot be found by search.
7. Assign the write permissions to all members or to managers only (the Channel creator is automatically a manager).
8. Finish the creation using the „CREATE CHANNEL" button.
9. The Channel will open for you immediately.

Invite users

1. Open the Channel that you want to create invitations for.
2. Tap on the three dots.
3. Press „Invite members".
4. Select all desired Channel participants.
5. You can add an invitation text to your invitation using the „pencil" icon.
6. Confirm creation of the invitations using the check mark on the top right.
7. All users will receive a notification and can accept or reject the invitation.

Join Channel (subscribe)

1. Open the navigation via the "Menu" icon at the top left. Select "Chats" and then tap on the "CHANNELS" tab.
2. Press the „plus" icon in the lower right corner.
3. Select „Join Channel".
4. Select the desired Channel from the „Recommended Channels" or „All Channels" list.
   • Already subscribed Channels have a green „check mark" icon.
   • Password-protected Channels have a „key" icon
   • For Channels with a „letter" icon, participation must be requested
   • Confirm the participation or enter the required password.
5. The Channel will open for you immediately.

1 CHANNELS   CONVERSATIONS

2 +

3 New Channel

4 Channel name

5 Description (optional)

6 Public

7

8 CREATE CHANNEL

3

4 Jon Doe

5 **6**

1 CHANNELS   CONVERSATIONS

2 +

3 Join Channel

stashcat®

Conversations

You can find the list of all your active individual and group conversations here. You can create as many conversations as you like with one or more participants. You can remove a conversation from the list by archiving it. The content remains intact. Simply start a new conversation with the same participants to access the content again.

Note: after creating a conversation, no participants can be added or removed. Please use a channel for this option.
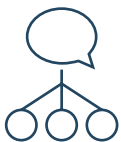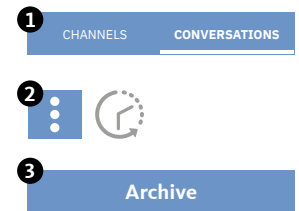
Create a new conversation

1. Open the navigation via the "Menu" icon at the top left. Select "Chats" and then tap on the "CONVERSATIONS" tab.
2. Press the „plus" icon in the lower right corner.
3. Select all desired conversation participants and confirm the creation with the check mark in the top right corner.
4. The conversation will be opened for you immediately.
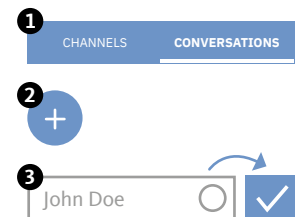
1 CHANNELS **CONVERSATIONS**

2 +

3 John Doe ✓

Archive conversation

1. Open the navigation via the "Menu" icon at the top left. Select "Chats" and then tap on the "CONVERSATIONS" tab.
2. Open the conversation menu (keep conversation pressed for longer) and select „Archive."
3. The conversation is removed from the list.
4. Simply create a new conversation to continue the conversation.

1 CHANNELS **CONVERSATIONS**

2

3 Archive

Broadcasts

Provided you have the appropriate authorizations, the broadcast function allows you to reach a large number of users with a single message. The users receive the message in a single conversation and can reply to you.

Creating a new broadcast list

1. Open the navigation via the „Menu" symbol in the upper left corner or drag the menu in from the left edge of the screen.
2. Select „Conversations" and then the „Speech bubble" icon in the bottom bar.
3. Tap on „Broadcasts" and then on the „Plus" symbol in the top right-hand corner to create a new broadcast list.
4. Then select all users who will receive your message and tap „Next".
5. Give the broadcast list a name to help you assign it later and then click „Done". The created broadcast list will be opened for you immediately.

Contacts

You will find the list of all members of your organisation in the sidebar under Contacts. You can search for users by clicking on the „magnifying glass" icon at the top. Select a contact to view their details, start a call or send a message.

Note: if the visibility of users in your organisation is restricted by an administrator, you may not be able to see all users.
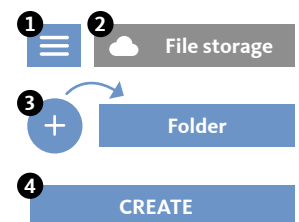
File storage

Organise and save your files in folders and share them with other users inside or outside the app. You have access to your data anytime, anywhere.

The file storage is divided into the „PERSONAL" and „CHATS" areas. While the personal area contains files that only you have access to, the „CHATS" area lists all files that you have shared in chats.
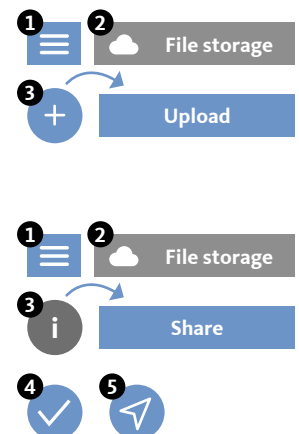
1 | **2** File storage
3 + | Folder
4 | CREATE

Create folder [PERSONAL]

1. Open the navigation via the "Menu" icon at the top left.
2. Tap on "File storage".
3. Press the „plus" icon in the bottom right corner and select „Folder".
4. Enter your desired name for the new folder and confirm with „CREATE".
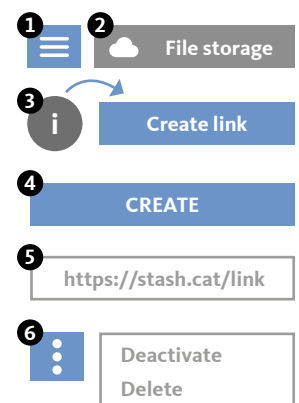
1 | **2** File storage
3 + | Upload

Upload file [PERSONAL]

1. Open the navigation via the "Menu" icon at the top left.
2. Tap on "File storage".
3. Tap on the three dots in the lower right corner and select „Share in chat".
4. Allow the app access to your files, if requested.
5. Select the file you want to upload.

1 | **2** File storage
3 i | Share
4 ✓ | **5** ➤

File sharing [PERSONAL and CHATS]

1. Open the navigation via the "Menu" icon at the top left.
2. Tap on "File storage".
3. Press the three dots on the file you want to share and select „GENERATE LINK".
4. Optionally, enter a password to protect your link and confirm with „GENERATE LINK".
5. The generated link will be copied directly. The link can also be sent to and retrieved by a external user.
6. To deactivate or delete the link, perform steps 1 and 2 again. If a link has been generated for the file, it will now be displayed. Via the three dots behind the link you can deactivate or delete it.

External links allow you to share files and folders with others who do not have access to the app.

1 | **2** File storage
3 i | Create link
4 | CREATE
5 | https://stash.cat/link
6 ⋮ | Deactivate / Delete

Create external link [PERSONAL and CHATS]

1. Open the navigation via the "Menu" icon at the top left.
2. Tap on "File storage".
3. Press the (i) on the file you want to share and select „Generate link".
4. Optionally enter a password to protect your link and confirm with „Create".
5. The generated link will be displayed. Copy the link by pressing the link for longer, enabling the file to be sent to and accessed by a user who does not use the app.
6. You can deactivate and delete the link via the menu to the right of the link.

External links allow you to share files and folders with others who do not have access to the app.

Notifications

The following notifications are displayed:

Channel invitations

Once someone invites you into a Channel, you will receive a notification. This notification contains the creator of the message, the Channel name, and the options for accepting or rejecting the invitation.

Calendar notifications

As soon as someone invites you to an appointment, you will receive a notification. For private appointments, you can accept or decline the appointment. Public appointments or Channel appointments are entered directly in the calendar and do not need to be confirmed.

Survey Notification

As soon as someone invites you to a survey or responds to your survey, you will receive a notification.

New device logged in

Each time you log in with your account on a device, you will be informed by notification about the time and the IP address used.

Confirm requested key

If a member in one of your subscribed Channels or conversations has reset their key (generates a new encryption password), they will need to obtain a new key from you to decrypt the existing content.

Joining requests

If you are the manager of an encrypted Channel, you can receive joining requests from other users. You can centrally manage and confirm or reject requests via the Notification Center.

Settings

In Settings, you can adjust and view your account and app settings. You can access the settings using the side menu. The current profile picture and status can be adjusted by clicking on the profile picture on the top left. By clicking on the pencil button, the profile picture can be reset or a new picture uploaded or photographed.

Account
- You can make changes to email address, password, and encryption here.
- A list is displayed of terminals that are active or offline. Individual devices can be deactivated.
- How much space is currently in use is visualized under „Cloud storage".

Email notifications
- You can enable or disable email notifications in this view.

Privacy
- You can choose whether to show your Online status or location in the privacy settings. You can also suppress your read confirmation.

Notifications
- In this section, you can configure the notification settings for each area in detail and mute all incoming calls.

Data usage
- You can specify how the app behaves in mobile networks here. The settings can increase the app's data economy.

Appearance
- In this section, you can change the sorting of names or customize certain views in the app.

Security
- You can set individual security rules for access to your app here.

Organizations
- Overview of the organisations in which you are a member.
- Extend your membership.
- Join a new organization with a 10-digit or 29-digit registration key using the plus symbol at the bottom right.

Registration Key *(with permission)*
- Assuming the appropriate permission, this view allows you to create registration keys for other users.

Log out
- „Log out" directly logs you out of the app.

Restore default settings
- Reset the app to its default settings. *Attention: all individual settings will be reset.*

About the app
- This view allows you to find additional information about the app, including with the version number.
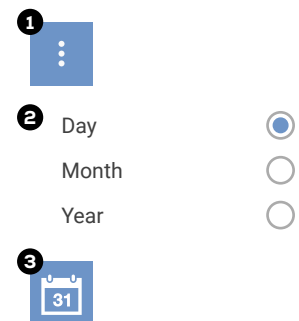
Calendar

The calendar module will be displayed when the module is activated for your organisation. You can access the calendar via the calendar icon in the sidebar.

Calendar views

You can change the view by tapping the vertically arranged three dots in the top right.

- **Day view**
  You will be shown the respective calendar week along with an hourly division of the selected day, including all upcoming appointments.

- **Month view**
  You will find an overview of the month here, along with all appointments for the selected day.

- **Year view**
  You will receive an overview of the selected year. When you tap the picture it automatically switches to the month view.

At the top, tap the calendar icon with today's date to switch to the current date.

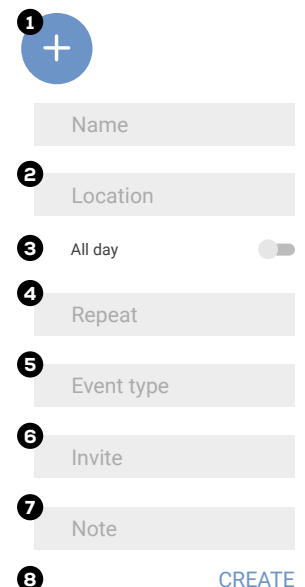**Display options for created appointments**

The days with appointments are marked by dots in both the month view and in the day view.

- If you tap on a date in the month view, you will be shown an appointment overview for that day.
- To view details about an appointment, tap the appointment in the overview. In addition to basic information about the appointment, you will find here an overview of commitments, cancellations, and pending replies from other participants.

Create appointment

To create an appointment, tap the „plus" icon in the bottom right corner. A dialogue will open for entering your appointment information.

1. Give the appointment a name.
2. Optionally add a location.
3. Choose whether to create your appointment for the whole day or select the date and time.
4. Specify whether it is a one-time or a recurring appointment.
5. Select the appointment type.
   - Private: create a private appointment or invite individuals to your appointment as needed.
   - Channel: create an appointment for a Channel. All Channel members will be invited
   - Public: create a public appointment. This will be visible to all users of your organisation.
6. Invite people to attend the appointment.
7. Optionally add a note.
8. Tap „Create" and confirm the appointment.

1

2 Day   ●

Month   ○

Year   ○

3

1 +

2 Name

3 Location

4 All day

5 Repeat

6 Event type

7 Invite

8 Note

CREATE

9

Appointment types

If you only want to display certain appointments, you can filter by the three appointment types in the overview. You can add or hide appointment types for your calendar view. In the main view in the upper bar, tap the icon with the vertically arranged lines.

- **Private appointments | green**

You will find your private appointments here. You can show or hide them in your calendar using the „green square".

- **Public | red**

You will see all the organisations appointments here. If you belong to several organisations, you have the option of showing or hiding the appointments of an organisation. To do this, tap on the „red square" in front of the respective organisation.

- **Channel | blue**

Your Channels will be displayed, the appointments for which you can individually turn on or hide. To do this, tap on the „blue square" in front of the respective Channel.

Reply to appointments

Users who have been invited to your appointment will automatically receive an appointment invitation in their notifications („bell icon" in the sidebar) and have the option here to confirm or decline the appointment.

Appointment details and editing

As an appointment creator, you can view your confirmations and cancellations, edit your appointment, or delete the appointment.

1. In the relevant day or month view, tap the appointment. This opens a detailed overview with the current status of confirmation or cancellation.
2. Tapping on the „pencil" gives you the option to edit or delete your appointment later.

Surveys

To access the Survey feature, tap the survey icon in the module bar to the left. This opens the survey module's main view.

Main view

You can switch views using the „OWN", „ACTIVE", or „ARCHIVED" tabs.

- **OWN**
  The „OWN" tab gives you an overview of the surveys you have created. It also clearly displays important key points, such as the total number of participants or the current response status.

- **ACTIVE**
  This section displays the surveys you have been invited to and that are currently active.

- **ARCHIVED**
  You can move the surveys you have already participated in to this section. You can also find already expired surveys here.

- **Search**
  Tap the magnifying glass and enter a search term or keyword to search for surveys.

Create survey

To create a survey, tap the „plus" icon in the bottom right corner of the main screen. This puts you in creation mode. Surveys can only be created if your user role has been granted permission to do so

Step 1: Information

- Specify a name for your survey.
- Is this an anonymous survey? In that case, only you can see the participants and their answers.
- If you want to limit the survey period, set the period with start and end times.
- Optionally add a description.
- Tap on „Continue".
- Now add a question and choose whether you want the answers to your survey to be given as responses to an open query or to a date query with a fixed date and time.

Step 2: Set question and answer options

1. *Edit questions with „Open query"*

You now have the option of entering any number of open query options for your question.

- Add as many open query options as you like and select how many participants are permitted to choose the individual options in each case.
- Then decide how many answers each participant may select.
- Tap on „Done".

OWN

ACTIVE

ARCHIVED

1 +

2 Survey name

3 Anonymous survey

4 Start (Optional)
Ende (Optional)

5 Description

6 • • • • CONTINUE

7 + ADD QUESTION

8 🕐 Date
☰ Free assignment

1 What's the question?

2 Options
+ ADD OPTION

3 How many participants can choose this option?   All

4 DONE

5 + ADD QUESTION

6 • • • • CONTINUE

11

- You can now duplicate your question with a swipe to the left using the „three dots" or, if needed, add further questions using the „plus" icon.
- Tap on „Continue".
2. *Edit questions with „Date"*

You have the option here of entering any number of response options with fixed times for your question.

- Select any number of times for your question as an answer option.
- Define how many participants are permitted to select them for each answer.
- You can now duplicate your question with a swipe to the left using the „triple dot" icon or, if necessary, add further questions using the „plus" icon.
- Tap on „Done".

Step 3: Invitation

- Now select the participants of your survey via „Add participants" and decide between Channels or individual contacts.
- Tap on „Continue".

Step 4: Confirmation

- You will receive an overview of your complete survey for a final check.
- Tap on „Create".
- Your survey will now appear in the main view under „Own".

Administration of your surveys

You have the option of administering your own surveys in the main view under „Own". To do this, tap the triple dot next to the survey to open the action menu.

- **Results**
  You will receive a detailed overview of the current status of your survey.

- **Follow/Unfollow**
  Enable or disable notifications about a surveys current status.

- **Edit**
  Here you can edit your survey. If the survey is already active, only the settings and not the questions can be edited.

- **Archive**
  The survey is archived and can no longer be viewed under „Own" but under „Archive".

- **Delete**
  Your survey will be deleted.

1 What's the question?

2 OptionS

+ ADD OPTION

3 Start

ADD END TIME

All day

4 How many participants can choose this option? All

5 CONTINUE

1 + Add participants

2 # Channels

👤 Contacts

3 • • • • CONTINUE

4 • • • • CREATE

1 Results

2 Unfollow

3 Edit

4 Archive

5 Delete

12

App installation

1. Download the app free of charge from the Apple App Store and install the app on your iOS device. Type „stashcat" in the Apple App Store search box to find the app faster.

   Note: If the installation from the Appstore is not possible, please check the system requirements. At least iOS 12 is required for installation. Older operating systems are no longer supported. If the installation is further not possible, please contact the administration to check the organisational guidelines for the installation of applications on mobile devices (Mobile Device Management).

2. After installation, open the app screen on your iOS device and type „stashcat" in the search box. Press the logo to launch the app.

Account activation

Using a 10-digit registration key

1. To register your account, open the app and click on „No account yet".
2. Enter your 10-digit registration key.
3. After you have entered your registration key, you can you specify your e-mail address and password as well as your first and last name. Your account will be created by tapping on „Create account".
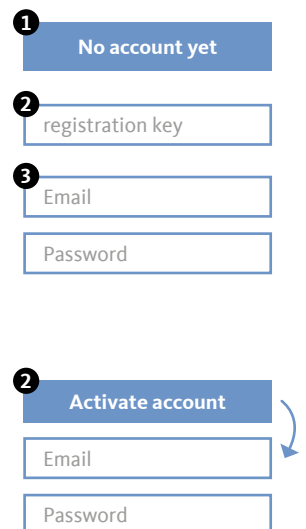
Using a 29-digit registration key

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3. After you have entered your registration key, you can specify your email address and password. Your account is now active.

Using an email link:

1. You have received an email from your company that allows you to register your account with just one click.
2. To do this, tap on „Activate account" in the email. Enter your email address and password. Your account is now active.

Note: E-Mail not found?

1. Open the spam/junk mail folder in your mail program.
2. Right-click on the email which you don't want in the spam folder. Move your mouse over the „Junk" item and click on „Never block sender".
3. Drag the e-mail to your inbox.

① No account yet

② registration key

③ Email

Password

② Activate account

Email

Password

Log in

1. Open the app.
2. Enter your e-mail address, confirm it the first time you login and press „Next".
3. Enter your password and tap „Log in" to log in.

1 | Email
Next

2 | Password
Log in

Encryption method

Communication is encrypted end-to-end to ensure optimal protection of your data. You have several options for encrypting the app:

Activation using another device

If you are already logged in with a device, you can use it to activate the new device. Make sure you have the latest version installed and have the device on hand.

1. Log in and select the option, „Using another device".
2. On the already activated device, give your consent that the device may be used for activation.
3. Enter the displayed 6-digit code on your iOS device.

1 | **With another device**

2 | **Allow**

3 | 1 | 2 | 3 | 4 | 5 | 6
1 | 2 | 3 | | |

Activation by entering your encryption password

1. Log in and select the option, „Using your encryption password".
2. Enter your encryption password.
3. Press „Done".

1 | **With your encryption password**

2 | Encryption Password

3 | **Activate**

Did you forget your encryption password?

If you have forgotten your encryption password, you can assign a new password.

ATTENTION: In order to view the contents of your encrypted chats, you must be authorized by another chat participant. Only assign a new encryption password if you really cannot determine your old encryption password.

1. Log in and select the option, „Did you forget your encryption password?".
2. Enter a new encryption password and then enter it again.
3. Press „Done".

1 | **Forgot your encryption password?**

2 | Encryption password
Repeat Encryption password

3 | **Done**

Add user

There are two types of registration keys:

1. The 10-digit, non-personalized key.

If you have the appropriate authorization, you will find the button „Invite user" in the settings. By tapping on „Invite users" you will get an overview of your created registration keys. Here you can delete your created keys and see who has used your key. You can use the „plus" to create a new registry key.

Note: Since the 10-digit keys are not personalized, they can be used several times. After entering the key, users must enter their personal data themselves.

2. The 29-digit, personalized key.

The creation of 29-digit, personalized keys is only available for administrators and therefore only in the desktop and web client. The first and last name of the user is fixed and cannot be edited by the user himself.

Extend Organizational Membership

If an expiration date has been stored for the users, they can extend their organizational membership with a 10-digit, non-personalized key. The 10-digit registration key can be created by users with the appropriate authorization. (see *Adding Users*)
To extend your organizational membership, tap Settings -> Organizations. Tap on the organization for which you want to renew your account and then tap on „Renew Membership".

Note: In addition to the new expiration date, the role stored in the 10-digit key is also taken over for the user.
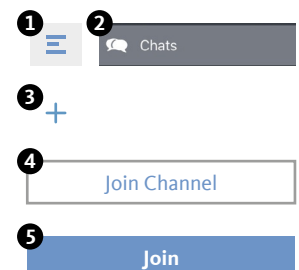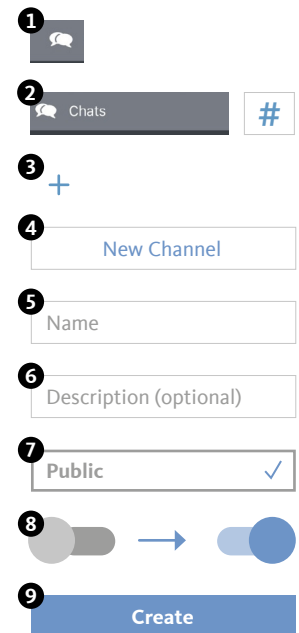
Channels

Create a Channel

1. Open Navigation using the „Menu" symbol in the top left corner or drag the menu from the left edge of the screen.
2. Select „Chats" and then the „#" icon in the bottom bar.
3. Press the „plus" icon in the upper right corner.
4. Select „New Channel".
5. Give the Channel an appropriate name.
6. You can add a description for the Channel.
7. Choose a Channel type:
   - Public Channels are accessible to every user.
   - For password protected channels, the user must enter the correct password or be invited to the channel. If a user is invited, they do not have to enter the password.
   - Encrypted channels can only be entered by invitation by a member of the channel. A user can still submit a membership request, which must be confirmed by a channel member. Encrypted channels can also be hidden so that they cannot be found by search.
8. Assign the write permissions to all members or to managers only (the Channel creator is automatically a manager).
9. Finish the creation using the „Create" button.
10. The Channel will open for you immediately.

Invite users

1. Open the Channel that you want to create invitations for.
2. Press the Channel name at the top of the screen to open the Channel menu.
3. Tap „Invite" in the list.
4. Select all desired Channel participants.
5. Confirm creation of the invitations by tapping the „Invite" button.
6. All users will receive a notification and can accept or reject the invitation.

Join Channel

1. Open Navigation using the „Menu" symbol in the top left corner or drag the menu from the left edge of the screen.
2. Select „Chats" and then the „#" icon in the bottom bar.
3. Press the „plus" icon in the upper right corner.
4. Select „Join Channel".
5. Select the desired Channel from the „RECOMMENDED" or „ALL" list.
   - Already subscribed Channels have a „check mark" icon.
   - Closed Channels are indicated with a lock. Either a password is required for these or membership can be obtained by invitation or by request to join.
6. Confirm that you want to join or enter the required password in the input field at the bottom of the screen.
7. The Channel will open for you immediately.

Conversations

You can find the list of all your active individual and group conversations here. You can create as many conversations as you like with one or more participants. You can remove a conversation from the list by archiving it. The content remains intact. Simply start a new conversation with the same participants to access the content again.

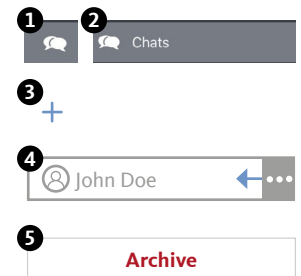*Note: after creating a conversation, no participants can be added or removed. Please use a Channel for that.*

Create a new conversation

1. Open Navigation using the „Menu" symbol in the top left corner or drag the menu from the left edge of the screen.
2. Select „Chats" and then the „speech bubble" icon in the bottom bar.
3. Press the „plus" icon in the upper right corner.
4. Select all the conversation participants you want and press „Done" in the top corner.
5. The conversation will be opened for you immediately.
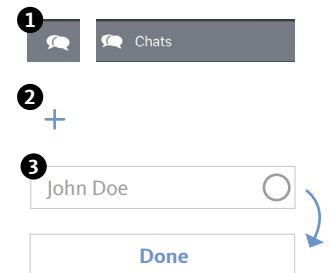
Archive conversation

1. Open Navigation using the „Menu" symbol in the top left corner or drag the menu from the left edge of the screen.
2. Select „Chats" and then the „speech bubble" icon in the bottom bar.
3. Open the conversation menu (drag chat to the left).
4. Select „Archive" and confirm the action.
5. The conversation is removed from the list.
6. Just create a new conversation to continue the chat.

Broadcasts

Provided you have the appropriate authorizations, the broadcast function allows you to reach a large number of users with a single message. The users receive the message in a single conversation and can reply to you.

Creating a new broadcast list

1. Open the navigation via the „Menu" symbol in the upper left corner or drag the menu in from the left edge of the screen.
2. Select „Conversations" and then the „Speech bubble" icon in the bottom bar.
3. Tap on „Broadcasts" and then on the „Plus" symbol in the top right-hand corner to create a new broadcast list.
4. Then select all users who will receive your message and tap „Next".
5. Give the broadcast list a name to help you assign it later and then click „Done". The created broadcast list will be opened for you immediately

Contacts

Open Navigation using the „Menu" symbol in the top left corner or drag the menu from the left edge of the screen. Select „Contacts." Select a contact directly from the list, or enter a name via Search. Select a contact to view its details or send a message.

Note: if the visibility of users in your organisation is restricted by an administrator, you may not be able to see all users.

File storage

Organise and save your files in folders and share them with other users inside or outside the app. You always have access to your data from anywhere. The file storage is divided into the „Personal" and „Chats" areas. While the personal area contains files that only you have access to, the „Chats" area lists all files that you have shared in chats.
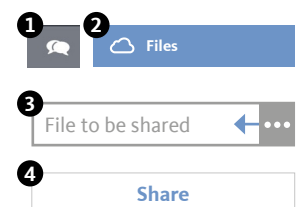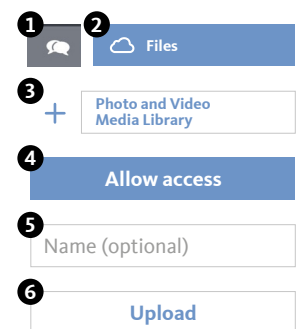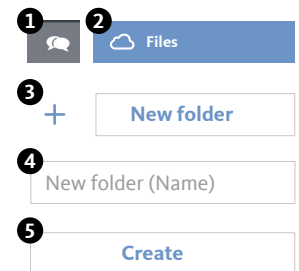
Create folder [Personal]

1. Open Navigation using the „Menu" symbol in the top left corner or drag the menu from the left edge of the screen.
2. Select ‚File storage'.
3. Tap on the three dots and select „New folder".
4. Enter your desired name for the new folder and confirm with „Create Folder".

Upload files [Personal]

1. Open the navigation via the „Menu" icon at the top left or drag the menu in from the left edge of the screen.
2. Select „File storage".
3. Press the three dots and select the directory from which you want to upload a file.
4. Allow the app access if it is requested.
5. Select the file you want to upload and finish the process by clicking „Confirm".

File sharing [Personal and Chats]

1. Open the navigation via the „Menu" icon at the top left or drag the menu in from the left edge of the screen.
2. Select „File storage".
3. Open the file menu (press and hold on the file) of the file you want to share.
4. Select „Share in Chat."
5. You can share the file to as many conversations and channels as you want. Filter the list to find conversations and channels faster.
6. Confirm with the check mark in the upper right corner.

1 | **2** Files
3 + New folder
4 New folder (Name)
5 Create

1 | **2** Files
3 + Photo and Video Media Library
4 Allow access
5 Name (optional)
6 Upload

1 | **2** Files
3 File to be shared ← •••
4 Share

1 | **2** Files
3 File to be shared ← •••
4 Share
5 Generate link
5 https://stash.cat/link
6 Copy
Deactivate
Delete

Create external link [Personal and Chats]

External links allow you to share files and folders with others who do not have access to the app.

1. Open the navigation via the „Menu" icon at the top left or drag in the menu from the left edge of the screen.
2. Select „File Storage."
3. Open the file menu (press and hold on the file).
4. Select „Generate Link". The generated link will be displayed to you and the file can be accessed via it by a external user.
5. Via the link menu you can copy, deactivate and delete it.

Notifications

Open Navigation using the „Menu" symbol in the top left corner or drag the menu from the left edge of the screen. Select „Notifications." The following notifications are displayed:

The following notifications are displayed:

Channel invitations

Once someone invites you into a Channel, you will receive a notification. This notification contains the creator of the message, the Channel name, and the options for accepting or rejecting the invitation.

Calendar notifications

As soon as someone invites you to an appointment, you will receive a notification. For private appointments, you can accept or decline the appointment. Public appointments or Channel appointments are entered directly in the calendar and do not need to be confirmed.

Survey Notification

As soon as someone invites you to a survey or responds to your survey, you will receive a notification.

New device logged in

Each time you log in with your account on a device, you will be informed by notification about the time and the IP address used.

Confirm requested key

If a member in one of your subscribed Channels or conversations has reset their key (generates a new encryption password), they will need to obtain a new key from you to decrypt the existing content.

Joining requests

If you are the manager of an encrypted Channel, you can receive joining requests from other users. You can centrally manage and confirm or reject requests via the Notification Center.

Settings

In the settings you can customize and view your account and app settings. You can access the menu by clicking on the profile picture in the sidebar.

Account
In this section you can view your storage space and view or edit your e-mail address.

Notifications
You can adjust the push settings this section. You will be taken directly to your phone's push settings. You can also copy your push ID in this section.

Privacy & Security
Here you can set the online status and read confirmation, change your passwords and suppress incoming calls.

Data usage
Here you can define how the app should behave in mobile networks. Through the settings you can increase the data sparseness of the app.

Organizations
- Overview of the organisations in which you are a member.
- Extend your membership.
- Join a new organization with a 10-digit or 29-digit registration key using the plus symbol at the bottom right.

Invite users
Here you will find an overview of your created 10-digit keys. By clicking on the plus symbol in the upper right corner you can create additional 10-digit keys.

Calendar
The calendar settings can be edited here with respect to calendar week display, start of week and day.

Appearance
You can specify the sort and display order in the contact list.

About the app
This view allows you to find additional information about the app, along with the version number.

Log out
„Log out" directly logs you out of the app.

Calendar module

The calendar module will be displayed when the module for your organisation has been unlocked. You can access the calendar via the calendar icon in the sidebar.

Calendar views
You can change the view using the buttons „Year", „Month", and „Day".

| Year | Month | Day |

Year view
You will receive an overview of the selected year.

Month view
You will find an overview of the month here, along with all appointments for the selected day.

Day view
You will be shown the respective calendar week along with an hourly division of the selected day, including all upcoming appointments.

Tap „Today" at the bottom to always jump to the current date.

Today

31

Display options for created appointments
The days with appointments are marked by dots in both the month view and in the day view.
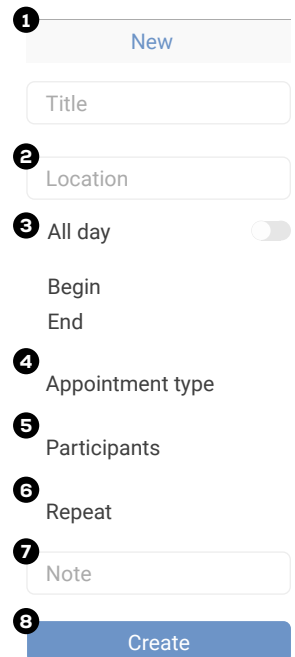
- If you tap on a date in the month view, you will be shown an appointment overview for that day.
- To view details about an appointment, tap the appointment in the overview.

In addition to basic information about the appointment, you will find here an overview of commitments, cancellations, and pending replies from other participants.

Create appointment
To create an appointment, tap „New" in the bottom right corner. A dialogue will open for entering your appointment information.

1. Give the appointment a name.
2. Optionally add a location.
3. Choose whether to create your appointment for the whole day or select the date and time.
4. Select the appointment type.
    - Private: create a private appointment or invite individuals to your appointment as needed.
    - Channel: create an appointment for a Channel. All Channel members are invited
    - Public: create a public appointment. This will be visible to all users of your organisation.
5. Add participants via the „plus" icon.
6. Specify whether it is a one-time or a recurring appointment.
7. Optionally add a note.
8. Tap „Create" to complete the action.

1 New
Title
2 Location
3 All day
Begin
End
4 Appointment type
5 Participants
6 Repeat
7 Note
8 Create

Appointment types

If you only want to display certain appointments, you can filter by the three appointment types in the overview. You can add or hide appointment types for your calendar view. In the main view, tap on „Filter".

Private appointments | green

You will find your private appointments here. You can show or hide them in your calendar using the „green square".

Channel | blue

Your Channels will be displayed, the appointments for which you can individually turn on or hide. To do this, tap on the „blue square" in front of the respective Channel.

Public | red

You will see all the organisations appointments here. If you belong to several organisations, you have the option of showing or hiding the appointments of an organisation. To do this, tap on the „red square" in front of the respective organisation.

Reply to appointments

Users who have been invited to your appointment will automatically receive an appointment invitation in their notification center („bell icon" in the sidebar) and have the option of confirming or canceling the appointment.

Appointment details and editing

As an appointment creator, you can view your confirmations and cancellations, edit your appointment, or delete the appointment.

1. In the relevant day or month view, tap the appointment. This opens a detailed overview with the current status of confirmation or cancellation.
2. Tapping on „Edit" gives you the option to edit or delete your appointment later.

Survey module

To access the Survey feature, tap the survey icon in the module bar. This opens the survey module's main view.

Main view

You can switch views using the „My", „Active", or „Archived" tabs.

| My | Active | Archived |

My
The „My" tab gives you an overview of the surveys you have created. It also clearly displays important key points, such as the total number of participants or the current response status.

| My |

Active
This section displays the surveys you have been invited to and that are currently active.

| Active |

Archived
You can move the surveys you have already participated in to this section. You can also find already expired surveys here.
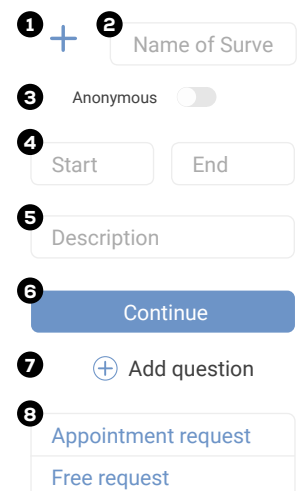
| Archived |

Create survey
To create a survey, tap the „plus" icon in the bottom right corner of the main screen. This puts you in creation mode. Surveys can only be created if your user role has been granted permission to do so.

Step 1: Information
3. Give your survey a title.
4. Is this an anonymous survey? In that case, only you can see the participants and their answers.
5. Set a time period during which your survey will be open.
6. Optionally add a description.
7. Tap „Continue".
8. Now add a question and choose whether you want the answers to your survey to be given as responses to an open query or to a date query with a fixed date and time.

❶ + **❷** Name of Surve

❸ Anonymous

❹ Start | End

❺ Description

❻ Continue

❼ ⊕ Add question

❽ Appointment request
Free request

Step2: Set question and answer options

1. Edit questions with „Open query"
You now have the option of entering any number of open query options for your question.

• Add as many open query options as you like and select how many participants are permitted to choose the individual options in each case.
• Then decide how many answers each participant may select.
• Tap on „Done".You can now duplicate your question with a swipe to the left using the „triple dot" icon or, if necessary, add further questions using the „plus" icon.
• Tap on „Continue".

2. Edit questions with „Date query"
You have the option here of entering any number of response options with fixed times for your question.
- Select any number of times for your question as an answer option.
- Define how many participants are permitted to select them for each answer.
- You can now duplicate your question with a swipe to the left using the „triple dot" icon or, if necessary, add further questions using the „plus" icon.
- Tap on „Continue".

Step 3: Invitation
- Now select the participants of your survey via „Add participants" and decide between Channels or individual contacts.
- Tap on „Continue".

Step 4: Confirmation
- You will receive an overview of your complete survey for a final check.
- Tap on „Create".
- Your survey will now appear in the main view under „My".

Administration of your surveys

You have the option of administering your own surveys in the main view under „My". To do this, swipe the survey to the left. There will be a triple dot that you can use to open the following menu.

Results
You will receive a detailed overview of the current status of your survey.

Follow/Stop following
Enable or disable notifications about a surveys current status.

Edit
Here you can edit your survey. If the survey is already active, only the settings and not the questions can be edited.

Archive
The survey is archived and can no longer be viewed under „My" but under „Archive".

Delete
Your survey will be deleted.

1 What's the question?

2 (+) Add an answer option

3 How many response options can participants choose? Multiple

4 Done

5 ⋮ **6** Duplicate question
Delete

7 Continue

1 (+) Add participants

2 Channels
Contacts

3 Continue

4 Create

…

1 Results

2 Follow/Stop following

3 Edit

4 Archive

5 Delete

Web and Desktop Client
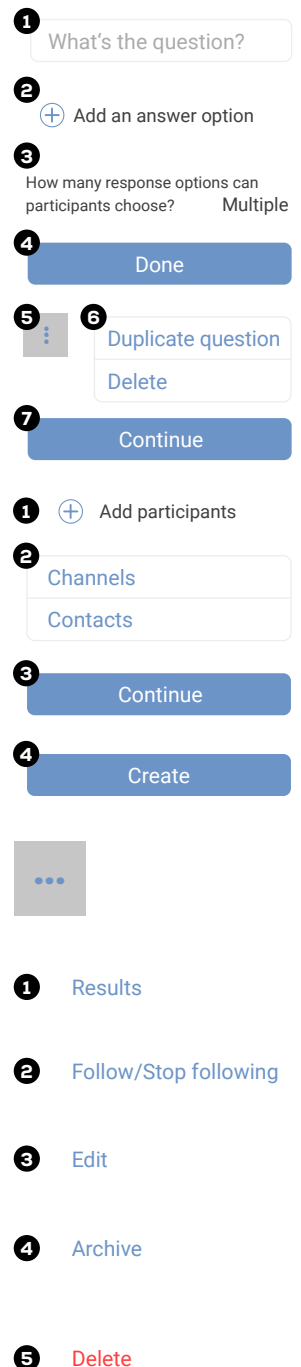
Download the desktop application

1. Go to www.stashcat.com/en/app-downloads.
2. Download your desktop application. You will automatically get the desktop application optimized for your operating system.

Account activation

Per 10-digit registration key

1. To register your account, access the following page:
   https://app.stashcat.com/web/app#/start/register
2. Enter your 10-digit registration key.
3. Once you have entered your registration key, you can enter your email address and password, as well as your first and last name. Click on „Create account" to create your account.

Registration key
Check

Per 29-digit registration key *(personalized)*

1. To register your account, access the following page:
   https://app.stashcat.com/web/app#/start/register
2. Enter your registration key
3. After you have entered your registration key, you can specify your email address and password. Your account is now active.

Registration key
Check

Using an email link:

1. You have received an email from your company that allows you to register your account with just one click.
2. To do this, tap on „Activate account" in the email. Enter your email address and password. Your account is now active

Note: E-Mail not found?

1. Open the spam/junk mail folder in your mail program.
2. Right-click on the email which you don't want in the spam folder. Move your mouse over the „Junk" item and click on „Never block sender".
3. Drag the e-mail to your inbox.

Log in

1. Open the application.
2. Enter your e-mail address, confirm it the first time you login and press „Next".
3. Enter your password and tap „Log in" to log in.

①
Email address
Next

②
Password
Log in

Encryption and activation

First activation after registration

Note: it is necessary to take this step once after registration.

Activation requires an encryption password. This is additionally required with every login to the account password.

1. Enter a new encryption password and then enter it again.
2. Press „GENERATE".

Activation using another device

If you are already logged in with a device, you can use it to activate the new device. Make sure you have the latest version installed and have the device on hand.

1. Log in and select the option, „Using another device".
2. On the already activated device, give your consent that the device may be used for activation.
3. Enter the displayed 6-digit code on your device.

Activation by entering your encryption password

1. Log in and select „Using your encryption password".
2. Enter your encryption password.
3. Press „Continue".

Did you forget your encryption password?

If you have forgotten your encryption password, you can assign a new password here.

ATTENTION: If you reset your encryption password, conversation partners in encrypted chats must first confirm your new key request before you can read the content again.

1. Log in and select the option, „Did you forget your encryption password?".
2. Enter a new encryption password and then enter it again.
3. Press „Continue".

1 Encryption password

Repeat the encryption password

2 Generate

1 Activate by another device

2 Allow

3 1 | 2 | 3 | 4 | 5 | 6

1 | 2 | 3 | | |

1 Using your encryption password

2 Encryption password

3 Continue

1 Create a new Key

2 Encryption password

Repeat the encryption password

3 Reset

Add user

There are two types of registration keys:

1. The 10-digit, non-personalized key.

If you have the appropriate authorization, you will find the item „Invite user" at the bottom left of the stashcat homepage. Click on „Invite user" to open the configuration overview of the key.

You can access an overview of the registration keys you have created by clicking on the gearwheel below ⇨ Settings ⇨ „Invite user". Here you can delete your created keys and see who has used your key.

Note: Since the 10-digit keys are not personalized, they can be used several times. After entering the key, the users must enter their personal data themselves.

2. The 29-digit, personalized key.

By default, creating 29-digit personalized keys is only available to administrators (see Organization Settings). The user's first and last name is fixed and cannot be edited by the user himself.

Extend Organizational Membership

If an expiration date has been stored for the users, they can extend their organizational membership with a 10-digit, non-personalized key. The 10-digit registration key can be created by users with the appropriate authorization. (see "Adding Users")

To extend your organizational membership, click on the gear -> Settings -> Organizations. Click on the three points next to the organization for which you want to renew your membership and select „Renew Membership".

Note: In addition to the new expiration date, the role stored in the 10-digit key is also taken over for the user.
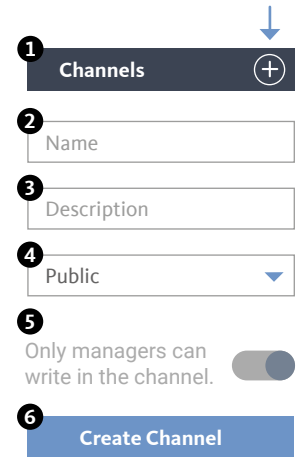
1 ⚙

2 🏢 **Companies**

3 Extend Membership
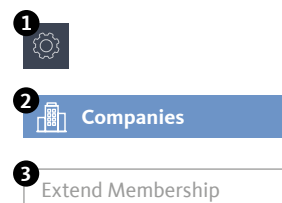
Channels

Create a Channel

1. In the left page section, click the „plus" icon next to „Channels".
2. Give the Channel an appropriate name.
3. You can add a description for the Channel.
4. Choose a Channel type:
   - Public Channels are accessible to every user.
   - For password protected channels, the user must enter the correct password or be invited to the channel. If a user is invited, they do not have to enter the password.
   - Encrypted channels can only be entered by invitation by a member of the channel. A user can still submit a membership request, which must be confirmed by a channel member. Encrypted channels can also be hidden so that they cannot be found by search.
5. Assign the write permissions to all members or to managers only (the Channel creator is automatically a manager).
6. Finish the creation using the „Create Channel" button.

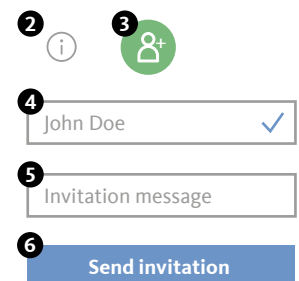|	
1	Channels ⊕
2	Name
3	Description
4	Public ▾
5	Only managers can write in the channel. ⬤
6	**Create Channel**

Invite users

1. Open the Channel that you want to create invitations for.
2. Select „Information" above the Channel menu in the top right corner.
3. Click on „Invite".
4. Select all desired Channel participants. If you have the appropriate permissions, you can also invite contact groups (for example, marketing department) to Channels.
5. You can add invitation text to your invitation.
6. Confirm creation of the invitations using the „Send invitation" button.
7. All users will receive a notification and can accept or reject the invitation.
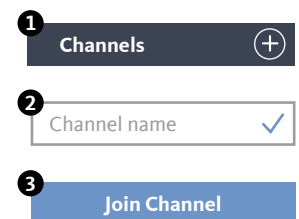
2 ⓘ	**3** 👤+
4	John Doe ✓
5	Invitation message
6	**Send invitation**

Join Channel (subscribe)

1. Click on „Channels" on the left side.
2. In the search field, enter the name of the Channel you want to join, or select the Channel you want from the list of „Recommended Channels" list.
3. Click on „Join Channel" in the bottom right corner.

|	
1	Channels ⊕
2	Channel name ✓
3	**Join Channel**

Web and Desktop Client

Conversations

You can find the list of all your active individual and group conversations here. You can create as many conversations as you like with one or more participants. You can remove a conversation from the list by archiving it. The content remains intact. Simply start a new conversation with the same participants to access the content again.

Note: After creating a conversation, no participants can be added or removed. Please use a Channel for that.

Create a new conversation

1. In the left sidebar, click the „plus" icon next to „Conversations."
2. Select all desired conversation participants and confirm the creation with the „Create" button.
3. The chat will open for you immediately.

1 Conversation ⊕

2 John Doe ✓

Create conversation
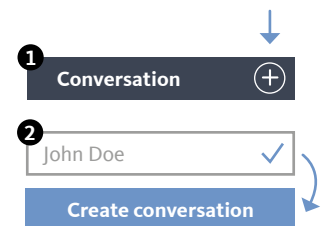
Archive conversation

1. Click in the corresponding conversation and open the conversation menu via the info icon in the upper right corner.
2. Select „Archive".
3. The chat will be removed from the list.
4. Simply create a new conversation to continue the conversation.

1 ⓘ **2** ⬌

Broadcasts

The broadcast function enables you to reach a large number of users with just one message, provided that you have the appropriate authorizations. The users receive the message in a one-on-one conversation and can answer you.

Creating a New Broadcast List

1. Click on „New list".
2. Give the broadcast list a name in order to be able to assign it later.
3. You can use the search function to select the users who should receive your message.
4. Click on „Create".
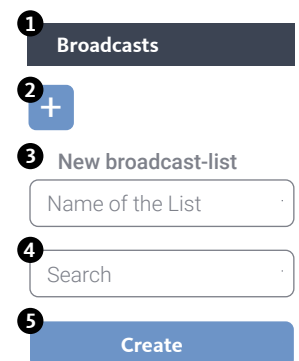
1 Broadcasts

2 +

3 New broadcast-list

Name of the List

4 Search

5 Create

Contacts

You will find the list of all members of your organisation in the sidebar under Contacts. You can search for users using the search field at the top. Select a contact to view their details, send a message or start a call.

Note: if the visibility of users in your organisation is restricted by an administrator, you may not be able to see all users.

Web and Desktop Client

File storage

Organise and save your files in folders and share them with other users inside or outside the messenger. You have access to your data anytime, anywhere. The file storage is divided into the „Personal" and „Chats" areas. While the personal section contains files that only you have access to, the „Chats" section lists all files that you have shared in chats.

Create folder [Personal]

1. Open the file tray („clouds" icon) via the navigation bar on the left.
2. Click on „New" in the top right corner and select „Folder".
3. Enter your desired name for the new folder and confirm with „Create folder".
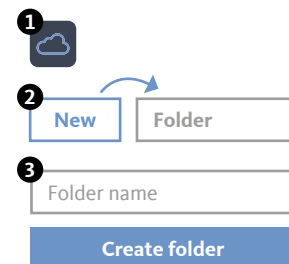
Upload file [Personal]

1. Open the file tray („cloud" icon) via the navigation bar on the left.
2. Click on „New" in the upper right corner and select „Upload files".
3. On your computer, locate the file you want to upload.

File sharing [Personal and Chats]

1. Open the file tray („Cloud" icon) via the navigation bar on the left.
2. Click the three dots at the end of the file you want to share and select the „Share" option.
3. You can share the file to as many chats and channels as you like. Search for users or conversations and optionally add a message.
4. Confirm by clicking the „Share" button at the bottom right.
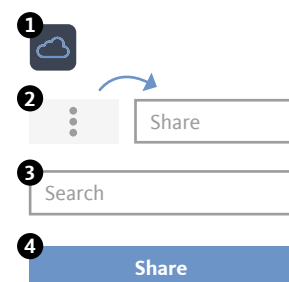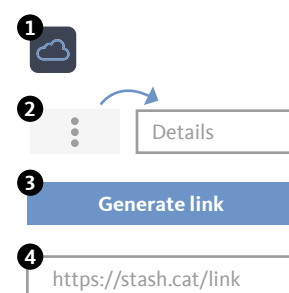
Create external link [Personal and Chats]

1. Open the file tray („cloud" icon) via the navigation bar on the left.
2. Click on the three dots at the file you want to share and select „Details".
3. Now click on „Generate link" in the window on the right.
4. Click on the generated link. You can now share this link with external people who do not have an account.

Notifications

The following notifications are displayed:

Channel invitations

Once someone invites you into a Channel, you will receive a notification. This notification contains the creator of the message, the Channel name, and the options for accepting or rejecting the invitation.

Calendar notifications

As soon as someone invites you to an appointment, you will receive a notification. For private appointments, you can accept or decline the appointment. Public appointments or Channel appointments are entered directly in the calendar and do not need to be confirmed.

Survey Notification

As soon as someone invites you to a survey or responds to your survey, you will receive a notification.

New device logged in

Each time you log in with your account on a device, you will be informed by notification about the time and the IP address used.

Confirm requested key

If a member in one of your subscribed Channels or conversations has reset their key (generates a new encryption password), they will need to obtain a new key from you to decrypt the existing content.

Joining requests

If you are the manager of an encrypted Channel, you can receive joining requests from other users. You can centrally manage and confirm or reject requests via the Notification Center.

Settings

In Settings, you can adjust and view your account settings. You can reach the menu by clicking on the cogwheel in the lower left („Settings").

Email
- Your email address, which you use the app with.
- The settings for email notifications.

Profile
- The option for adding your profile picture.
- The option for adding a status.
- Activate or deactivate the Enter key to send messages.

Appearance
- You can specify the sort and display order in the contact list.

Password
- Change your password.

Privacy
- Decide if your online status is visible.
- If necessary, suppress your read confirmation.
- Decide if your location will also be sent.

Encryption
- This section contains information about your encryption.

Devices
- This section shows you which devices are activated with your account.

Organizations
- Overview of the organisations in which you are a registered member.
- By clicking on the three points you can extend your membership.
- Via „Join Organization" you can join a new organization with a registration key of 10 or 29 digits.

Registration key
- Here you will find an overview of your created 10-digit keys.
- By clicking on „New key" further 10-digit keys can be created.

Call settings
- You can specify the settings for voice and video calls.

Notifications *(only for desktop client)*
- In this view, you can set the notification settings for the desktop.

Language
- Decide on the language that you want to use the app with.

Security
- Select whether you want to hide the chat view if you are not actively working in the app.
- Decide whether key inquiries will be answered automatically.

Automatic start *(only for desktop client)*
- Decide whether the client will launch right at system startup.

Proxy *(only for desktop client)*
- If required, you can configure your proxy settings here.

Sign out
- To log out, click on „Log out". You will be logged out of the app. If you want to log in again, you must enter your encryption password

About the app
- In this view, you can see the version number and other information about the app.

Calendar module

The calendar module will be displayed when the module is activated for your organisation. You can access the calendar via the calendar icon in the sidebar.

Calendar views

| Day | Week | Month | Year |

- **Day view**
  You will see the hourly division for the selected day including all upcoming appointments.
- **Weekly view**
  Here you will find a weekly overview as well as all appointments for the displayed days in an hourly schedule.
- **Month view**
  You will find an overview of the month here, along with all appointments for the selected day.
- **Year view**
  You will receive an overview of the selected year.

Use the arrows on the „Today" button in the upper right corner to move back and forth in the selected view per unit. If you click „Today" in the middle, the calendar will switch to the current date in the selected view. In the monthly and yearly view this is highlighted in blue.

< Today >
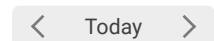
Quick navigation

The reduced calendar view in the lower left enables quick navigation to individual dates. This enables you to quickly switch to a specific date or to directly display specific dates

Display options for created appointments

- **Day view**
  In day view, click the appointment name. You will receive further details about the appointment. As an appointment creator, you have the option of editing or deleting the appointment using the triple dot.
- **Weekly view**
  Click on the name of the appointment in the week view. You will receive further details about the appointment. As the creator of an appointment, you can edit or delete the appointment using the triple point.
- **Month view**
  When you click on a displayed appointment in the month view, you will receive all the details for it. As an appointment creator, you can edit or delete your appointment using the „triple dot".
- **Year view**
  In the year view, you have the option of viewing all created appointments. Days on which appointments have been set are marked with a blue dot. If you move the cursor over a date, you will receive an overview of the upcoming appointments and appointment types.

Appointment types

The calendar module displays three types of appointments in the filter overview, which are visually subdivided into colours. You can add or hide appointment types for your calendar view. To do this, select or deselect the boxes to show or hide appointments.

1. **Private appointments | green**
   You will find your private appointments here. You can show or hide them in your calendar using the „green square".
2. **Channel | blue**
   Your Channels will be displayed, the appointments for which you can individually turn on or hide. To do this, tap on the „blue square" in front of the respective Channel.
3. **Public | red**
   You will see all the organisation's appointments here. If you belong to several organisations, you have the option of showing or hiding the appointments of an organisation. To do this, tap on the „red square" in front of the respective organisation.

Calendar

Private

Channel

Public

HIDE ALL

Create appointment

To create an appointment, click on the „plus" icon in the upper right corner. A dialogue will open for entering your appointment information.

1. Give the appointment a name.
2. Optionally add a location.
3. Optionally add a note.
4. Choose whether to create your appointment for the whole day or select the date and time.
5. Specify whether it is a one-time or a recurring appointment.
6. Select the appointment type.
- **Private -** Create a private appointment or invite individuals to your appointment as needed.
- **Channel -** Create an appointment for a Channel. All Channel members will be invited.
- **Public -** Create a public appointment. This will be visible to all users of your organisation.
7. Click on „Create" to complete the process.

❶ +

Name *

❷ Location

❸ Note

❹ All day

From:* 01 Jan 2020

Until:* 01 Jan 2020

❺ Repeat

❻ Event type:

Invite users

❼ Create

Reply to appointments

Users who have been invited to your appointment will automatically receive an appointment invitation in their notification centre („bell icon" in the sidebar) and have the option of confirming or cancelling the appointment.

Appointment details and editing

As an appointment creator, you can view your confirmations and cancellations, edit your appointment, or delete the appointment.
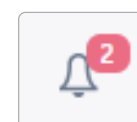
1. In the relevant day or month view, tap the appointment. This opens a detailed overview with the current status of confirmation or cancellation.
2. By clicking on the „triple dot" you now have the option of editing your appointment or deleting it.

• Event ...

Edit
Delete

Synchronisation with external calendars

All appointments from the app can be synchronised with external calendars using CalDAV. Click on the „Calendar Sync" button. You can choose here between a generic CalDAV link and a specific link for Apple devices.

Calendar

✓ Private 🔗

Calendar-URL

https://dav.stashcat/cal/..   Copy

Survey module

To access the Survey feature, tap the survey icon in the module bar. This opens the survey module's main view.

Main view

You can switch views using the „Yours", „Active", or „Archive" tabs.

- Yours
  The „Yours" tab gives you an overview of the surveys you have created. It also clearly displays important key points, such as the total number of participants or the current response status.
- Active
  This section displays the surveys you have been invited to and that are currently active.
- Archive
  You can move the surveys you have already participated in to this section. You can also find already expired surveys here.
- Search
  In the magnifying glass field, enter a search term or keyword to search for surveys.

Yours   Active   Archive

❶ Yours

❷ Active

❸ Archive

❹ Sort by ▾

❺ Search...

Create survey

To create a survey, tap the „plus" icon in the top right corner of the main screen. This puts you in creation mode. Surveys can only be created if your user role has been granted permission to do so.

Step 1: Information

- Specify a name for your survey.
- Is this an anonymous survey? In that case, only you can see the participants and their answers.
- Set a time period during which your survey will be open.
- Optionally add a description.
- Tap „Continue".
- Now add a question and choose whether you want the answers to your survey to be given as responses to an open query or to a date query with a fixed date and time.

1

Information

❶ Name of the survey

❷ Hidden survey

❸ Start: 01.01.2020

End: 01.01.2020

❹ Description

❺ Next

Step 2: Set question and answer options

1. Edit questions with „Open query"

- You now have the option of entering any number of open query options for your question.
- Add as many open query options as you like and select how many participants are permitted to choose the individual options in each case.
- Then decide how many answers each participant may select.
- Tap on „Save".
- You can now duplicate your question with a swipe to the left using the „three dots" or, if needed, add further questions using the „plus" icon.

2. Edit questions with „Date query"

- You have the option here of entering any number of response options with fixed times for your question.
- Select any number of times for your question as an answer option.
- Define how many participants are permitted to select them for each answer.
- You can now duplicate your question with a swipe to the left using the „triple dot" icon or, if necessary, add further questions using
- the „plus" icon.

Step 3: Invitation

- Now select the participants of your survey via „Add participants" and decide between Channels or individual contacts.
- Tap on „Continue".

Step 4: Confirmation

- You will receive an overview of your complete survey for a final check.
- Tap on „Create".
- Your survey will now appear in the main view under „Yours".

Administration of your surveys

„Follow" icon (participant / status)

To follow a survey and keep up to date on the current status, select the survey in the main view and click on the „radar" icon. You have the option of administering your own surveys in the main view under „Yours". To do this, click on the triple dot to the right in the relevant survey.

- **Results**
  You will receive a detailed overview of the current status of your survey.
- **Edit**
  Here you can edit your survey. If the survey is already active, only the settings and not the questions can be edited.
- **Archive**
  The survey is archived and can no longer be viewed under „Yours" but under „Archive".
- **Delete**
  Your survey will be deleted.
- **Export**
  You can export your results.

1 + ADD OPTION

2 What's the option?

3 How often?

4 Save

5 ... Duplicate

1 Start: 01.01.2020
End: 01.01.2020

2 How often?

3 ... Duplicate

3 Invitation
#Channels | Contacts
Next

4 Confirmation
Add

1 🛜

2 Follow survey

3 ...

1 Results

2 Edit

3 Archive

4 Delete

5 Export

Folder synchronisation

Folder synchronisation options are displayed when the module is enabled for your organisation. You can use folder synchronisation either in your own file storage or in a Channel file storage. F**older synchronisation is only possible with the desktop client.**

Create new sync folder

To set up a new sync folder in your own file storage, click on the cloud icon on the left and access your file storage.

- Click on „New" in the top right corner.
- Select „Sync folder".
- Use „Select folder" to locate your local destination folder and click „Save".

Synchronise existing folder

Select the folder to be synchronised in your file storage.

- Click the „triple dot" in the folder's row on the right.
- Select „Enable sync".
- Use „Select folder" to find your local destination folder and click „Save."

A permanent connection has been now established between the folder of the file storage and the local folder.

Note: a stable internet connection is required for continuous synchronisation of the folders.

1 ☁

2 New ▾

Upload files

Folder

Sync-Folder

3 Specify path to local folder:

C:/path/to/folder

Create Sync

1 ⋮

2 Activate Sync.

3 Specify path to local folder:

C:/path/to/folder

Create Sync

Web and Desktop Client
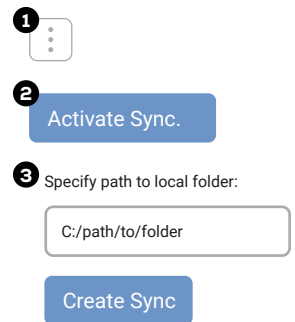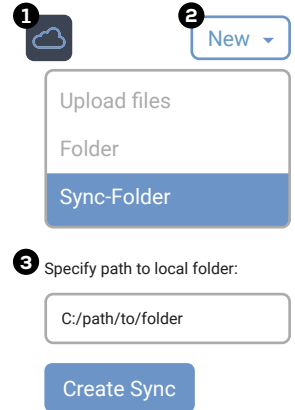
Organisation Settings

Organisation Settings are only available in the desktop and web client and for administrators.

To access the organisation settings, click on the „gear icon" in the navigation bar at the bottom left and select the sub-item „Organisation settings".

Users (Organisation Settings)

Click on „User" to open user administration. New members can be added to the organisation here, and you can manage accesses and permissions for all members of the organisation. Only users with administrator rights can access this section.

Create new user

1. Click on „New user" in the top right corner.
2. Enter the required information and assign a user role to the user. The app offers the option of defining your own user roles for your organisation. (See permissions)
3. Click on "Create user".

If an email address has been entered for a user during creation, an email will automatically be sent to the user once the creation is finished. If an email address has not been entered, the user must receive their registration key in another way (see „Creating registration letters").

Import users

Click on „Import users" at the top right. You now have the possibility to perform a pure import or a user comparison. Select one of the options and follow the next steps.

If an email address has been entered for a user during import, an email will automatically be sent to the user once the import is finished. If an email address has not been entered, the user must receive their registration key in another way (see „Creating registration letters").

Manage user

To edit a user, move the mouse over the user and select one of the following pictograms. Clicking on the user will show you the user details:

1. **Change account validity**
   Specify how long the account should be valid. After expiration of the validity, the user will be deactivated for 14 days and then deleted completely.
2. **Add to user roles**
   Define which role/roles you want to assign to the user.
3. **Add to contact groups**
   Assign the user to one or more contact groups. The contact group must have been created beforehand under the „Contact groups" tab. For more information on contact groups, please refer to the Contact Groups section in the manual.

1 New user

2 Forename

Surname

Email (optional)

external ID (optional)

Account validity

Assign user roles

Assign user groups

3 Add user

4. **Generate registration letter**
   A document with the user's registration key is output. You can print this document and distribute it to the appropriate users.

5. **Display mobile devices**
   All active end devices with which the user has logged on to the app are displayed. End devices can also be deleted by the administrator. The user then loses the authentication for this terminal device. In case of loss or theft of a terminal device, no unauthorized person will gain access.

6. **Deactivate user**
   This click deactivates the selected user. As long as the user is deactivated, the user cannot log in or be found by other users. The user can be reactivated by an administrator.

7. **Remove from organization**
   This click will remove the selected user from the organization after confirmation.

Multiple selection of users

In addition to the administration of individual users, you have the possibility to perform actions for several users at the same time. To select several users at once, check the parent box.

When selecting multiple users, you have the following options:

- **Change account validity**
  Expiration date for the users can be set or disabled.
- **Edit user roles**
  Existing user roles can be replaced or new user roles can be assigned.
- **Add to contact groups**
  Users can be added to already created contact groups.
- **Generate registration letters**
  Creates a collection of all registration letters for the selected users.
- **User information**
  Users can be assigned attributes that can be viewed by all users.
- **Remove from organization**
  Removes all selected users from your organization.

Filter

The filter allows you to filter users by status, validity, roles and contact groups.

Search

The search field on the top right enables targeted searching for a user.

Status

All

Expiry

All

Roles

All

Contact groups

All

Search users

User/Contact groups (Organisation Settings)

Users can be divided into groups in order to centrally group related users together.

Create a new user group

1. Click on „New user group" in the upper right corner.
2. Select a name for the new contact group. You can automatically create a Channel for the contact group with the „Create Channel" button. All members of the contact group are automatically members of the created Channel.
3. Click on „Continue".
4. In the next step, you select the users who will belong to this contact group.
5. Click on „Continue".
6. You have the option of restricting the communication Channels here, and you can select which other contact groups this contact group is permitted to communicate with.
7. Click on „Create contact group".

Edit user group

To manage a contact group, click on the „triple dot" in the contact group overview on the right. You will then you have a choice between:

• Edit
• Delete

1 Add user group

2 Name

Create channel

3 Next

4 John Doe ✓

5 Next

6 Restrict communication channels

7 Create contact group

Channels (Organisation Settings)

Click on „Channels" to open Channel management. All the organisations Channels can be viewed and managed here.

New Channel

The „New Channel" button allows you to create organization-wide Channels. In the organization-wide Channels, all users of the organization are automatically added without having to accept a Channel invitation.

Manage Channel

To manage a Channel, click on the „triple dot" in the Channel overview of Channel management on the right. You will then be able to:

• **Edit a Channel**
  You can change the name, description, and permissions for the selected Channel here.
• **Delete a Channel**
  Channels can be deleted here. *Note: the contents will be irretrievably lost.*
• **Search**
  The entry field with the „magnifying glass" on the top right offers targeted searching for a Channel.

Create Company Channel

Channel name

Description (optional)

Type

Company

Read-Only

Only managers can write in the channel.

Create Channel

1 Edit a Channel

2 Delete a Channel

Web and Desktop Client

Settings (Organisation Settings)

As the organisations administrator, you can centrally set some settings for your organisation. The settings affect the usage options for all users created in your organisation.

Manual account creation

With this setting the creation of user accounts can be activated/deactivated manually.

Self deletion of accounts

This setting allows you to choose whether or not your organisations users will be able to independently delete their account using settings. Deleted accounts cannot be recovered.

Deleting messages by the author

Here you can set whether authors can delete their messages in chats independently

Notifications on account expiry

Here you can set the time at which users with an expiration date receive a notification of the impending expiration.

Default language setting for newly created Accounts

Determines the language setting that will be applied to newly created accounts.

Automatic start

The application can be launched right at system startup. This setting enables automatic startup for all installed applications in your organisation.

Confirm email address

After a user is created, they will receive a confirmation email for activating their user account. If this setting is enabled, the email address must be confirmed before the account can be used.

Adjustable Email notifications when registering new devices

This setting allows you to specify whether users are allowed to configure the sending of email notifications when they register new devices in their account settings.

PIN protection for mobile devices

A PIN can be used to protect the app on mobile devices against access by unauthorized third parties. If PIN protection is specified (the options are „required" or „disabled"), the user has no influence on this setting.

Time interval until PIN re-entry

The app on mobile devices can ask the user for the PIN again after a defined period of inactive use. The setting specified on the server cannot be overwritten on the devices.

GPS settings for mobile devices

Mobile devices can be associated with a message that communicates the user's current position. The user can enable or disable this option. If „required" or „disabled" is selected, this option will no longer be adjustable.

Data encryption on mobile devices

Data stored on mobile devices can be locally encrypted, so that even if the device is lost and the device's physical memory is accessed, the data will remain protected. This setting can adversely affect the performance of mobile devices. If „required" or „disabled" is selected, this option can no longer be adjusted by the end user on their device.

Usage of GIPHY-Images

GIPHY images can be used in private chats and Channels. With this feature enabled, users can use the „GIF" tab to search for animated images in GIPHY and use them in chat.

Export content to mobile devices

Documents and content received on mobile devices can be copied and backed up externally. These features can be disabled - they are enabled by default.

Import on content from mobile devices

Documents and content that exists on mobile devices can be shared with others. These features can be disabled - they are enabled by default.

File sharing via links

Files from users' file repositories can be shared with external users via configurable links. This feature can be used with both mobile devices and desktop and web applications. If the feature is disabled, links can no longer be created.

Notifications on the lockscreen

Clients can view notifications of new messages in the lock screen of the relevant device. Display of these notifications can be adjusted by the user. If „plain text, not adjustable" or „protected, not adjustable" is selected, the user will not be able to adjust this option. Any restrictions due to the device operating system still apply.

Number of active devices

The number of simultaneously active devices can be restricted. If a number is set and another device is used that would exceed the number of active devices, the least recently used device is automatically removed.

Authorization to change contact information

Users have the option of changing their contact information. This setting can restrict the modification of contact information.

Create public Channels

Creating new public or password-protected Channels can be disabled for users. If this setting is disabled, only Channels that require an invitation can be created.

Management of registered devices in the apps

Here you can specify whether users can manage or delete their own devices.

Email-Templates (Organisation Settings)

As an administrator, you can edit and adjust the templates for your organisations various email notifications.

Statistics (Organisation Settings)

As an administrator, you can view user behavior statistics in the following categories:

- Number of messages sent
- Number of delivered messages
- Provided files in MB

The data can be filtered by the date. The display options also include an annual overview or calendar week view.

Company (Organisation Settings)

This section displays information about your organisation in accordance with the purchased license package. The data is stored in the system when creating the organisation and cannot be edited by administrators.

LDAP-Management (Organisation Settings)

In this area you can configure your LDAP/AD connection.

User-Status (Organisation Settings)

You can manage and add user statuses for the members of your organisation here.

Create new status

1. Click on „Add status" in the upper right corner.
2. Name the desired user status. If no check mark is set on notification, the user will no longer receive notifications when this user status is selected.
3. Click on „Add".

1 Add status

2 User status

Notifications

3 Add

User information

Create attributes to assign additional information to the users of the organization. Assigning the information to the attributes can be done individually per user in the user management.

① New attribute

②

Attribute	Visible
e.g. department	☑
e.g. location	☐

Password policies (Organisation Settings)

Here you can define policies for the account password and the encryption password.

User Roles (Organisation Settings)

This section is for managing the user roles in your organisation. In addition to the default user roles, which cannot be edited, you can create your own user roles with individually defined permissions.

1. Click on „New role" in the upper right corner.
2. Specify a name for the role.
3. Select the permissions for the new role.
4. Click on „Save".

The new user role can now be assigned to users.

1. Click on „Users" in the left menu section of „Organisation settings".
2. In the user administration, move the mouse over the user and click on the „Add to user roles" pictogram
3. Now assign the new user role to the user.
4. Click on „Save".

① New role

② Role name

☐ Permissions

③ Save

① Users

② edit the user

③ Save

Contracts (Organisation Settings)

As the authorized representative of your institution, in this section you can view and sign the current version of the order processing contract pursuant to Art. 28 of the EU-GDPR. We provide you with a template that you can supplement with your data and depict directly on the platform. You can also print the document. You will also find here a template for the processing directory pursuant to Art. 30 of the EU-GDPR, which you can download.

Organisation selection and organisation change

If you are registered in multiple organisations, you can switch between your organisations views without logging out and logging in again.

1. To switch, click on the icon for your desired organisation in the far left of the organisation section.
2. If you are registered in more than three organisations, click on „More".
3. A menu for organisation selection will appear.