

How to: Use Messenger on your desktop

What is Messenger?

Messenger is a secure, intra-office messaging product that brings together all your team communication into one place, increasing productivity and staff collaboration.

Messenger supports:

- One to one messaging
- Group messaging
- Channel messaging, based on teams, topics or workflows
- Attachments (video files, images, documents, audio files)
- Desktop and mobile

How do I use Messenger?

Follow these step-by-step instructions:

Before you begin

Messenger channels

Messenger can be organized into channels based on topics, teams, workflows or whatever makes sense for your office.

NOTE: You can also think of channels as chat rooms.

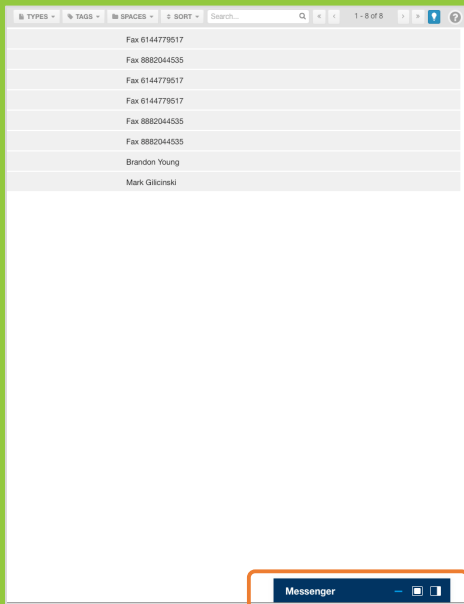
TIP: Think about the channels you will need and who should be members of each of those channels. You will have the opportunity to setup channels later in this document.

Desktop and mobile accessible

Messenger is available on both your desktop and mobile devices. The same features are available on both.

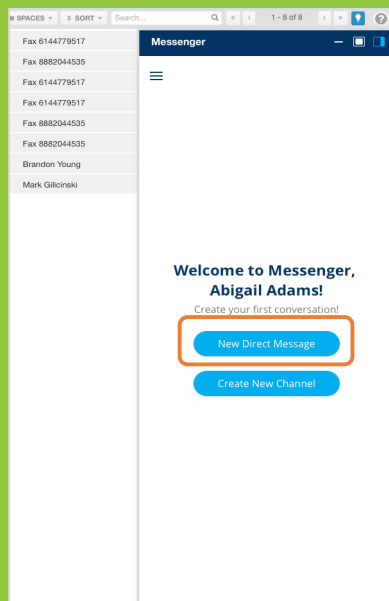
To use Messenger on your mobile device, browse to **chat.myupdox.com**.

Let's get started

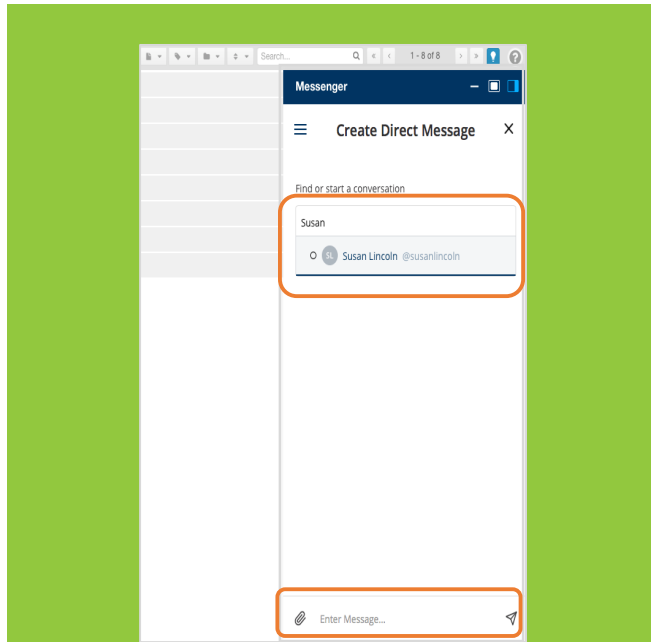


1. From the Inbox, select the Messenger bar found on the bottom of the screen. You have the option to select a full screen display or partial screen display.

TIP: Selecting the partial screen display will allow your Inbox to stay visible.



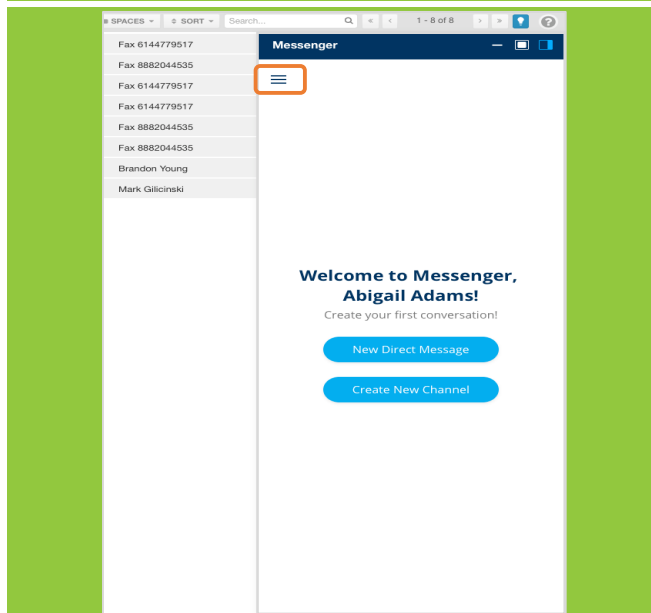
2. From the Messenger landing page, you have the option to view prior chat activity from the Messenger menu, start a new message or create a new channel. We are going to begin by sending a simple one to one message.
3. Select New Message.



4. The staff directory is auto-populated with users who have logged into Updox at least one time. Search who you want to chat with, enter your message and send. It's that simple!
5. Select the paper clip to add an attachment to your message.

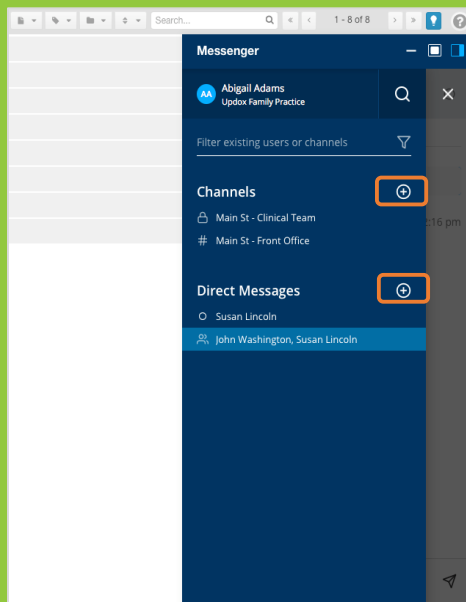
NOTE: Most file types are supported but have a maximum size of 50 MB.

The Messenger menu



1. Select the Messenger menu from the top left side of the Messenger window. The menu is always accessible and displays all your chat activity. You can also start new messages from here, continue previous conversations or create new channels.

TIP: Keep the Messenger menu open all day as your communication hub.



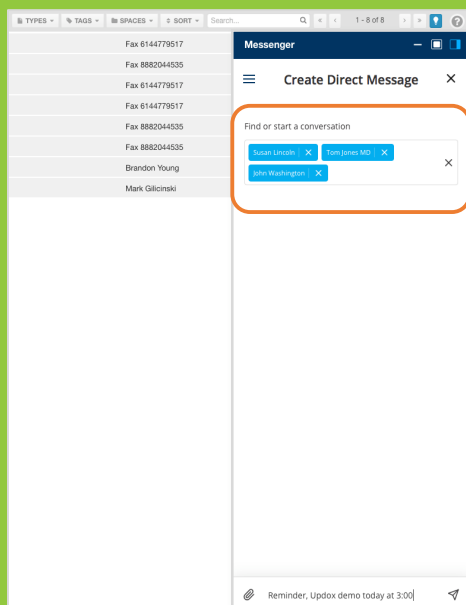
2. From the Messenger menu, select the + sign beside Messages to start a chat session with a new user.

NOTE: Any user or group you have previously chatted with will already be listed. Select any of them to continue the conversation. The history of all previous messages will display.

3. You can also create a new channel by selecting the + sign beside Channels.

NOTE: We will discuss channels a little later in this document.

Chat groups



Let's discuss chat groups.

4. You can also chat with groups of users. A chat group can be easily created by adding multiple people when you send a message.
5. From the Messenger menu, select the + sign beside Messages and add multiple users to your message.

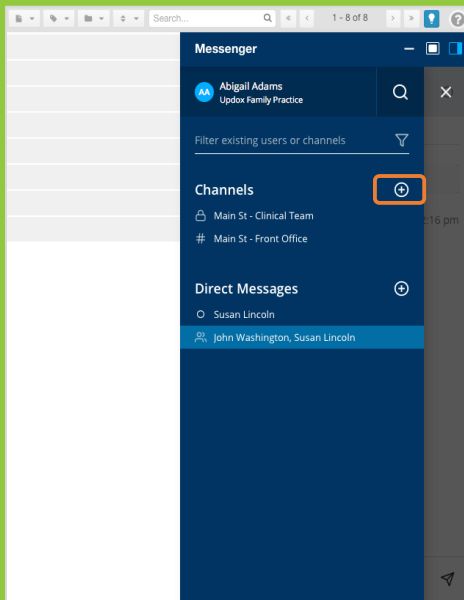
NOTE: Think about who should be in the group before you send the message. You will not be able to add people to an existing group later.

NOTE: Chat groups you have previously used will be listed in the Messenger menu. Select the group if you want to continue the chat. History of previous messages will display.

Channels

Finally, Messenger can be organized into channels based on topics, teams, workflows or whatever makes sense for your office.

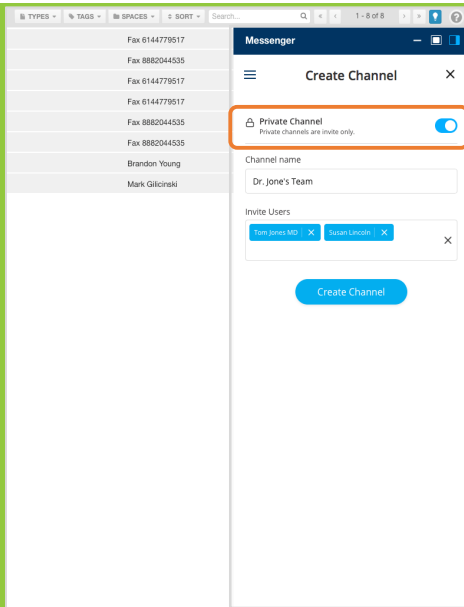
NOTE: You can also think of channels as chat rooms.



1. You can create a new channel either from the Messenger menu or the Messenger home screen. For this exercise, we are going to create a channel from the Messenger menu.

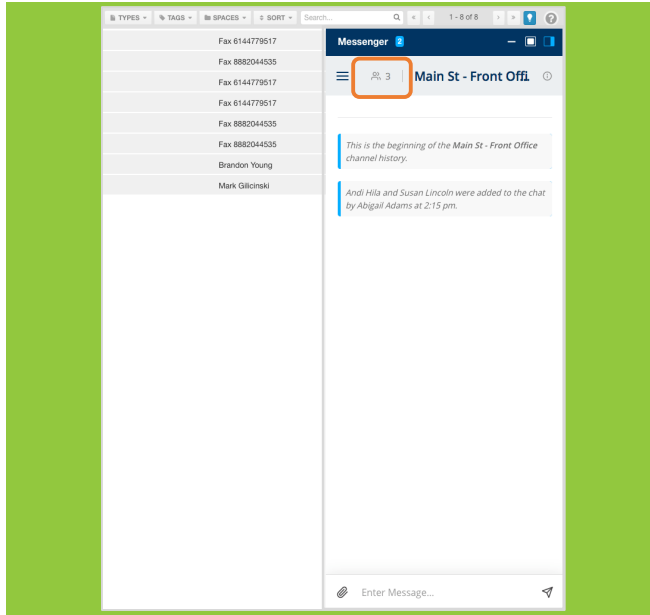
Note: Think of channels as a permanent kind of group with the added flexibility of being able to add and remove members as needed.

2. Select the + sign beside Channels to create a new channel. When the screen changes, you will be asked to give your channel a name and select the members of the group.

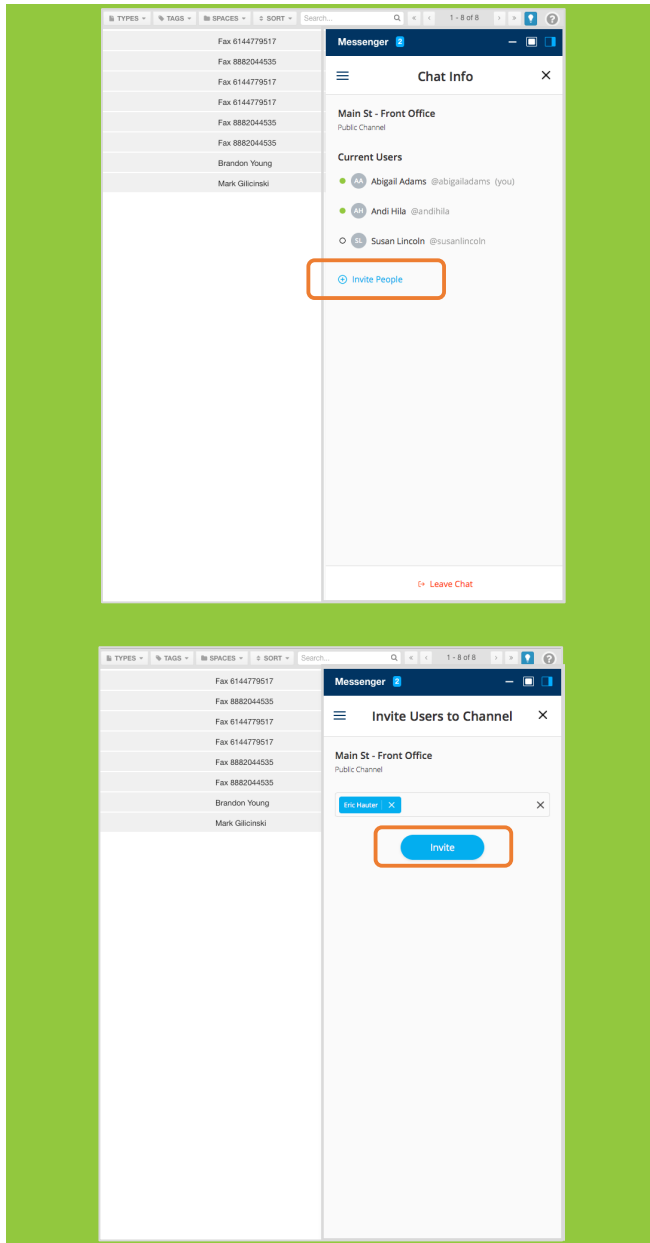


3. Channels can be designated as private or public. Any user can see and chat with a public channel. You must be a member of a private channel to chat with that channel.

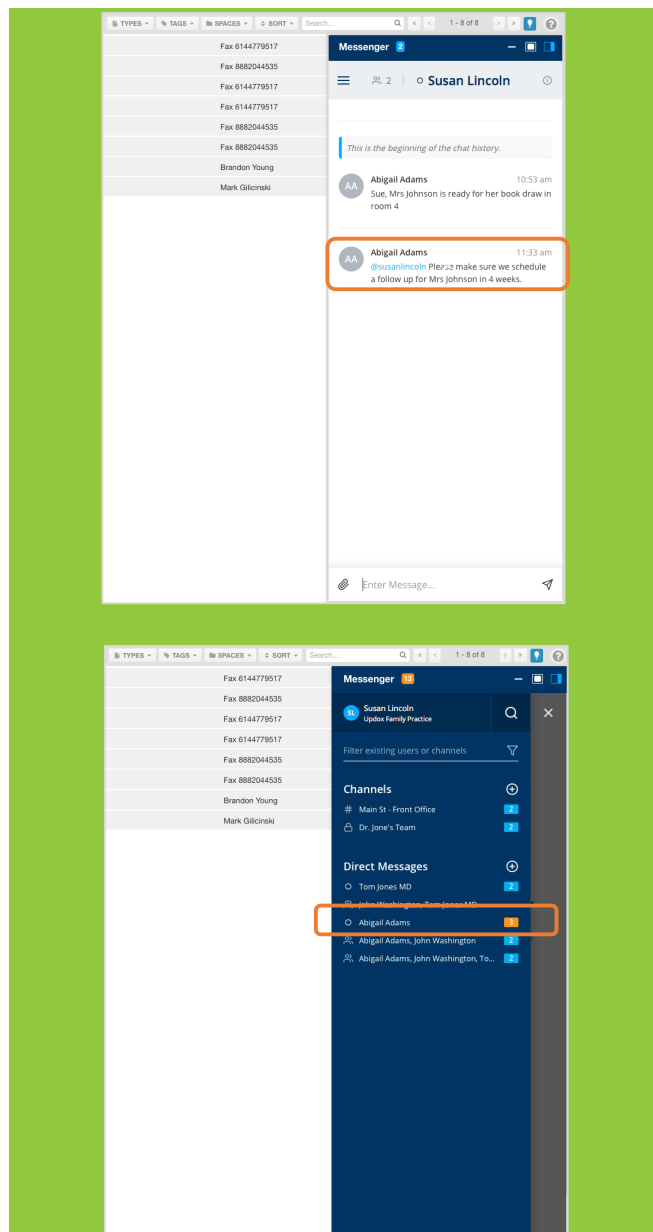
NOTE: Private channels are displayed with a lock in the Messenger menu.



4. To add a member to an existing channel, go to the Messenger menu and select the channel.
5. Select the people icon at the top of the screen.



6. All the current members of the channel will display. Select Invite People.
7. Search for the members you want to add. Select Invite to add the new members to the channel.

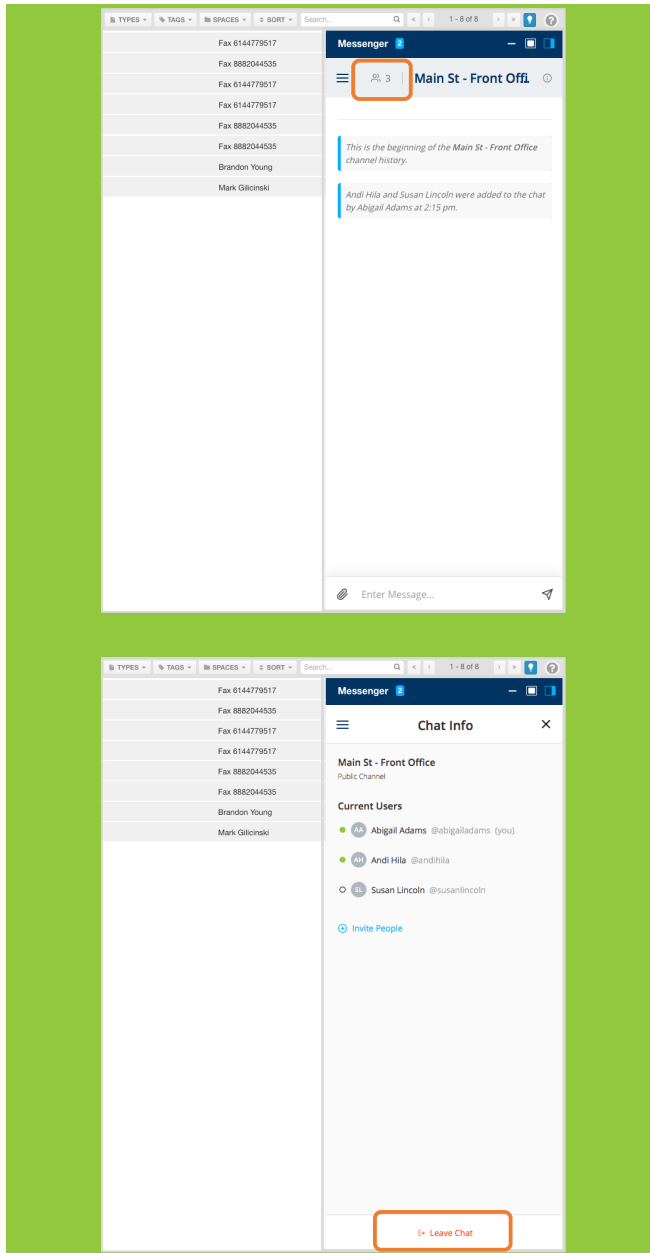


TIP: Another feature of channels is the ability to create an *@mention*. To get the attention of a channel member, use an *@mention* in your message. *@mentions* are entered with an *@* sign followed by the user name.

@username

NOTE: An orange icon will display on the Messenger menu to alert the user there is an important message they should view.

NOTE: Using an *@mention* in a message will also invite a user to a private channel.



8. If you want to leave a channel, go to the Messenger menu and select the channel. Select the people icon at the top of the screen.
9. Scroll to the bottom of the screen and select Leave Chat.

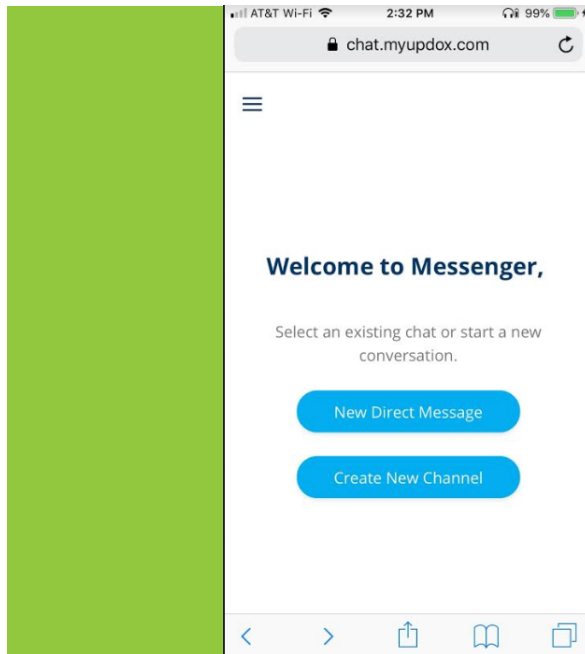
NOTE: If you want to rejoin a channel, you would need to be invited by a current member of the channel.

NOTE: Only the member themselves can elect to leave a channel. There is no concept of a channel admin.

How to: Use Messenger on your mobile device

When using Messenger on your mobile device, you have access to all the same features that are available on the desktop version. The interface is the same so this section of the job aid will focus on using attachments on your mobile device.

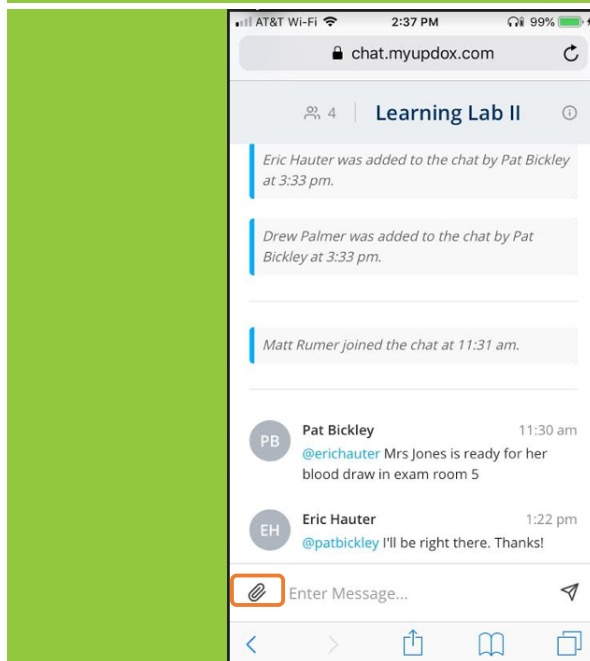
Browse to **chat.myupdox.com** on your mobile device. Use your Updox username and password to log in.



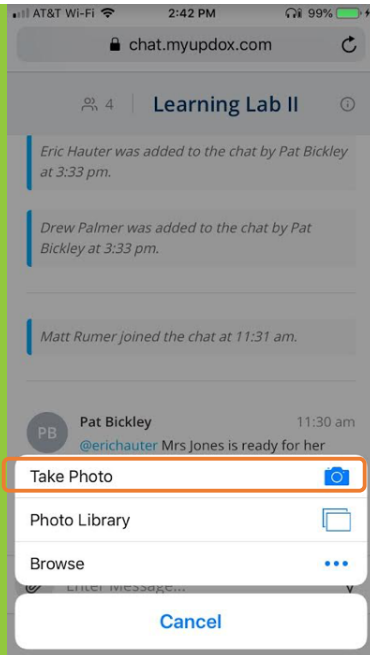
1. The mobile landing page is the same as working from your desktop. You have the same options to start a new message, create a new channel or go to the Messenger menu to see existing activity.

NOTE: All your activity displays on all your devices.

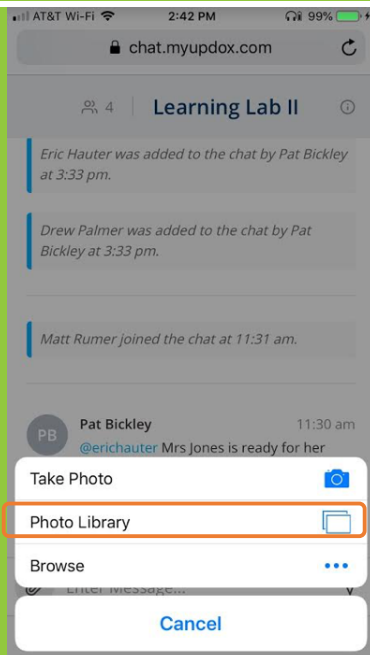
Attachments



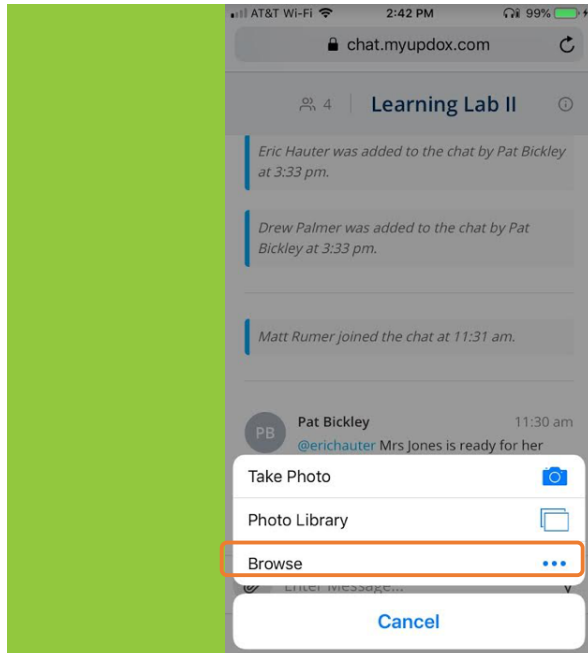
2. To attach a file or image to your message, select the paperclip. You will have the option to take a picture with your camera, add an image from your photo library or attach a file.



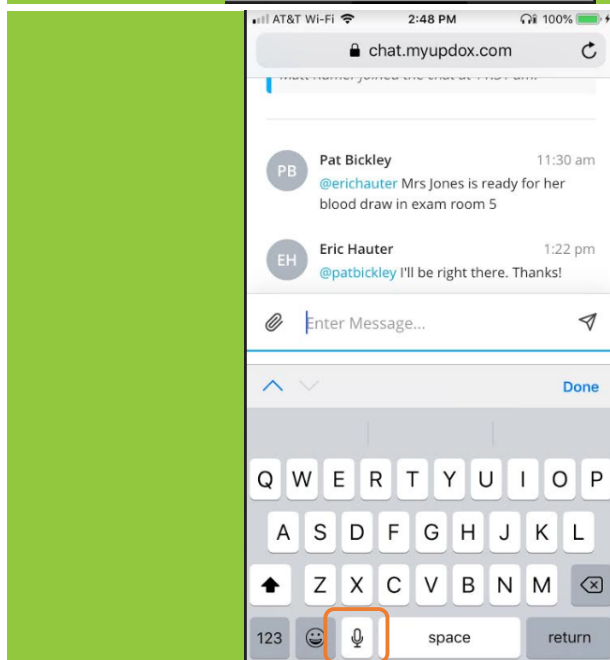
3. When you select the paper clip, this menu pops up. Take Photo will access the camera on your device. Take a picture and select Use Photo. The image will attach to your message.



4. If you choose Photo Library, we will access the photo library on your device. Select an image and it will attach to your message.



5. The last option allows you to attach files. The Browse option will look for folders on your device where you have saved documents.



TIP: Speech to text is an especially powerful feature for staff who are constantly on the go, whether moving from exam room to exam room or even when you need to communicate with staff from the hospital during rounds.

6. Select the microphone on your device and begin speaking. You will see your speech convert to a text message.

For more information, contact Updox at:

Sales@updox.com
614-798-8170 x1

Support@updox.com
614-798-8170 x2

Updox Learning Center
<http://help.myupdox.com>