TAKE CONTROL OF
SLACK

Covers Slack for
Mac • iOS • Web
Windows • Android

by GLENN FLEISHMAN
$14.99

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Welcome to *Take Control of Slack*, version 1.2.2, published in October 2020 by alt concepts inc. This book was written by Glenn Fleishman and edited by Kelly Turner and Joe Kissell.

This book teaches you the ins and outs of using Slack efficiently and effectively—and joyfully. It explains how to find channels, start conversations, post messages, set notifications, interact with bots, and more. It covers Slack on the web and in macOS, Windows, iOS/iPadOS, and Android. In the appendix, you learn the basics of administering a Slack workspace.

If you want to share this ebook with a friend, we ask that you do so as you would with a physical book: “lend” it for a quick look, but ask your friend to buy a copy for careful reading or reference. Discounted classroom and Mac user group copies are available.

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### Updates and More

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- Read the ebook’s blog. You may find new tips or information, as well as a link to an author interview.
Slack Terms

Slack uses a number of particular terms for aspects of its ecosystem that you will encounter again and again in this book and in using Slack. Here are the most common:

- **Conversation:** Slack is effectively a collection of “chat rooms,” each of which is either a channel or a set of direct messages between two or more people. Collectively, these are *conversations*.

- **Member:** Someone with a registered account that’s part of a Slack workspace.

- **Workspace:** A single set of Slack conversations and members is a *workspace*. Some large companies have many workspaces linked together via a high-end, paid Slack service tier. Most Slack setups consist of a single workspace as part of a “Slack for Teams” tier.

- **Group:** To have a generic term to refer to all Slack tiers, I’ll use the phrase “Slack group.”

- **Single-channel guest:** A member whose access is limited to a single channel (applicable only to paid plans).

- **Multi-channel guest:** A member whose access is limited to a selected set of channels (applicable only to paid plans).

- **@mention:** Slack lets you tag other people using a display name (see next) or their full name so that they can opt to be notified about you referring to them. I use “@mention” in the text to mean whenever Slack allows or expects an @ sign followed by someone’s name.

- **Display name:** A different way for people to @mention you in Slack than your full name. If this option is left empty at signup and never changed, then when people @mention you, Slack relies on your full name. The display name also appears in your profile.
What’s New in Version 1.2.2

Slack performed a little reorganization that requires explanation and added a new feature since the previous update:

• New personal menu relocates preferences and status: Everything profile-related, including your current workspace status, was relocated in the desktop and web apps. It used to appear as part of the workspace menu, which was frankly a confusing place for it to be. Now, it’s on its own. A new personal setting menu appears at the far right of the navigation bar, which is your profile thumbnail and a presence indicator. If you have an emoji set with your status it appears to the left of your image. This is noted throughout the book, but read particularly Navigation Bar and Set Your Status.

• Custom notification schedule: You can now set a schedule for when you want Slack notifications active with unique ranges of time for each day of the week. See Control Slack Notifications.

• Top of main sidebar reorganized (again): Slack tweaked how you control and display what appears in desktop and web apps at the top of the main sidebar. See Main Sidebar for all the details.

What Was New in Version 1.2.1

Slack made two minor but significant changes in its desktop and web apps since version 1.2 appeared:

• You can resize the width of the main sidebar at left and the Details sidebar at right. This may let you free up more screen real estate for the main messaging timeline or display longer channel names in the main sidebar. See Resize the Main Sidebar.

• If you want to receive simultaneous notifications in both mobile and desktop and web apps, Slack has added a very odd menu item in Notifications preferences that is literally contradictory. I explain how to find it, configure it, and why it’s so weird in When Mobile Devices Get Alerts.
What Was New in Version 1.2

Slack never stands still. The company believes in continuous improvement, and that means regular updates. In March 2020, Slack revealed a major interface redesign for desktop and web apps that they rolled out to workspaces over a few weeks. Then, in May 2020, they released overhauled mobile apps that had the same slow release to workgroups.

This was confusing, because if you were logged into multiple workspaces, you had some using the old interface and some with the new across the rollout. Because Slack released desktop updates first and then mobile, some people had to deal with multiple versions of workspaces across three months. Not ideal.

However, the improvements have finally eliminated a number of differences among apps, moved some items that were harder to find into more prominent positions—and arguably added wasted space.

This version of the book is updated to cover the many many many (many) small and large changes introduced in those interface overhauls. To wit, as follows!

Slack dramatically simplified the main window view, while also allowing better grouping and organization of the main sidebar, which could previously become long, cluttered, and somewhat randomly ordered as workspaces added channels and you had conversations with other members. See Master the Interface.

But the main sidebar now includes mandatory items and requires configuration on each app you use to remove items you don’t want. I presume Slack will continue to evolve and improve. See Main Sidebar.

A brief list of changes in desktop and web apps include:

- The toolbar has been split and reworked into new elements that break out into three areas:
  - The navigation bar includes workspace navigation arrows and a history menu that reveals all channels and conversations across
all your workspaces, listed from newest to oldest. A search field and a help button are also relocated here. See Navigation Bar.

- The channel header includes the channel or conversation name, number of members, and topic. (This item used to be nameless.) See Channel Header.

- At the far right above the message timeline, a new Details link now opens a sidebar filled with channel-specific information. (This was formerly called Channel Details.)

- Several items formerly in the toolbar have been shifted into the main sidebar at its top. These include “Mentions & reactions” and Files. Some new items appear there, too, gathered from elsewhere in the interface.

- The main sidebar now allows sections to be collapsed. The top section of new items has a “Show less/Show more” link. Below that, items like Starred and Channels can be collapsed by clicking a disclosure triangle, common to file-system interfaces.

- In paid plans, you can create custom sections in the main sidebar in which you group items together that are useful to you, and expand and collapse them. You can also opt to delete sections.

- When you create a reminder, a dialog appears where you can fill in details, eliminating the need for a full invocation from a message.

Mobile apps sport these changes:

- Mobile apps are generally now more aligned with desktop apps’ appearance and features. There are still differences I call out where appropriate.

- The workspace menu view now has four icons at the bottom: Home, DMs, Mentions, and You. This makes items formerly jumbled together in a settings menu more easily available. Preferences are found on the You tab. See Main Sidebar.

- If you liked mobile apps’ darker color scheme, too bad! The new apps have stark white backgrounds as you navigate through views
(Figure 1). A workspace theme you’ve chosen appears only as a color bar in the main sidebar view.

![Figure 1: A little glaring, folks!](image)

In all versions of Slack’s apps:

- Messages no longer have to be composed in the message area at the bottom of a channel or conversation. Instead, there’s a big New Message button that you can click or tap to create a message and decide to whom or for which channel it’s intended. See Create and Post a Draft.

- In-progress messages may be saved as drafts. You can complete them later or delete them without posting.

- A new shortcuts icon in the message area lets you access a number of scattered features, including reminders and integrations, as well as create all sorts of native items in Slack, like posts. See Write a Message.
Introduction

Slack fills an awkward gap in modern business and social-team communications by combining informal chat, private messaging, file transfer, and a collective memory of what’s taken place.

The service lets you create a public focus around a topic—a dedicated conversation space called a *channel*—as well as create purely private discussions as needed. You can upload images, add formatted text, and link in third-party cloud services.

Using Slack can sometimes feel a little like a group text chat, but with nested discussions (*threads*), channel- and workspace-wide search, and integration of third-party apps, it’s far more powerful and useful. It excels as a single repository of the wisdom (and data) of a group.

**Note:** Slack was originally developed incidentally as a communication tool for developers and staff making the game Glitch. Glitch didn’t catch fire, but the company and their investors thought they had something amazing in what ultimately became Slack.

Other tools and ecosystems exist that manage part of that ball of wax or cover the same territory and more—often adding “wiki” features for collaborative editing and website publishing for internal projects. But Slack’s particular set of choices, including a robust free tier of service and support across major platforms and the web, seems to have fit the need best for many millions of people.

Or at least, it fit best in the opinions of the hundreds of thousands of folks who chose Slack for a personal, professional, or social purpose, and set it up and asked millions of other people to join.

Therein lies the rub for many Slack users: we didn’t choose to use Slack, but we’re required to in order to participate in the interactions necessary for a full-time job, a contract position, a sports team, or a high-school “friends of the band” parental support group.
This book is for a few different kinds of people:

• If Slack is a requirement for your workplace, nonprofit group, or other organization, I want to help you learn enough to take the frustration out of it.

• If you use Slack already and want to get more out of it, this book will guide you to more efficient and more sophisticated use and control.

• Finally, if you’re interested in or tempted by Slack, this book will help you get started.

Many more Slack groups rely on the company’s free tier than any of Slack’s paid subscription offerings. The free tier has a number of limitations, but it’s quite remarkable in its own right. In this book, I always highlight differences between what you will find if you’re in a workspace that isn’t paying to use Slack and one that is, including what’s available at the several tiers of paid subscriptions.

**Note:** This book covers all production versions of Slack available: macOS, Windows, iOS/iPadOS, and Android. It also includes the web app, which is restricted to desktop users and blocked from mobile browsers.

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Read this book front to back, and you’ll gain knowledge in the order it’s most useful in Slack. However, you can also dive into topics if you’re already familiar with the system, and want more advice on particular tasks. Here’s a roadmap to the book:

**Get up and running:**
- Create or join a workspace, and install the Slack apps that work best for you. See *Make a Slack Workplace* and *Start Using Slack Apps*.
- Learn to work within Slack and post messages. See *Master the Interface* and *Post Basic Messages*.
- Understand how conversations work in channels and direct messages. See *Work with Channels* and *Conduct Direct Message Conversations*.

**Dive in depth on Slack:**
- Understand how Slack lets you know what’s going on, and customize it to avoid too many alerts. See *Configure Notifications*.
- Send messages with attachments, rich text, and formatted text. Read *Work with Attachments* and *Go Beyond Basic Messages*.
- Participate in calls, video conferencing, and screen sharing. See *Connect by Voice, Video, and Screen*.
- See whether your teammates are available in Slack—and set your own availability status. See *Make Your Presence Known*.
- Dig into the past when you *Search Effectively*.
- Learn how to add apps that extend Slack. See *Appendix A: Install Apps*.
Make a Slack Workplace

While this book is about using Slack, not everybody has a workspace available to them yet, and you might have acquired this book to learn whether Slack is right for you. The best way to find out? Set up a team. It’s free!

Slack has a robust free tier that I mention throughout the book. This tier offers a fairly large array of features, and you can create multiple “fake” accounts using different email addresses if you want to play around with interactions with other users. It’ll help you get a feel for what it’s like. You can also request a free trial of a paid plan, so you can test features only available in those higher-tier offerings.

Starting a workspace is completely straightforward. Visit Slack’s Create a Workspace page, where you begin by entering an email address and then confirming the address with a code sent to you. You then pick a name and Slack.com address for the workgroup, invite initial members, and get started.

A few years ago, you might have required a lot more help in proceeding. But Slack has matured, and the default settings offered for a new group are well set. For many situations, you may never need to monkey with administrative settings or preferences at all.

Slack has also done a great job with documentation for workspace administration. You can find help on the most trivial and most sophisticated tasks. In fact, their admin guides are quite a bit more complete than their support pages and guides aimed at regular users. (Not shockingly, that gap is why I wrote this book.)

**Note:** You could also consider joining a public Slack workspace, although you need to find one that meets your needs. Take care that your testing has no effect on other users. (You can “talk to yourself” in a direct message channel, as I explain in Conduct Direct Message Conversations.)

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Learn Slack Basics

Many people wake up one morning to a message. “Hello! We’ve decided to move [our company of a million employees, our polka-festival steering committee, our snack-and-ride youth soccer coordination messages] to Slack! It’ll be great, and you don’t need to learn a thing!”

Those of us who are older, perhaps a little cynical, and have already mastered 100 to 1,000 applications across our lifetimes will sigh deeply, then dig in. We rarely have a choice to not become part of the new way of things.

Other folks hear about Slack and wonder whether using the service could improve communication in their work group, nonprofit or academic organization, or social club. Slack, in contrast to email, group direct messaging, and mailing lists/discussion forums like Google Groups, lets you pick a discrete set of people who can interact and keeps an archive of messages in a single place that anyone can reach for future reference.

This book will help you get your sea legs whether you’re asked (or told) to use Slack or choose to use it. Slack isn’t hard to master, but it’s deeply featured and sometimes offers complicated interactions to get a simple result—like, stop pinging my phone with updates about messages! That has definitely improved over time.

This chapter provides a high-level overview of how Slack works and helps you understand what you can get out of it. I explain what makes Slack special and where its strengths lie.

If you’re already familiar with Slack and want to move on to more intermediate and advanced topics, skim or skip this chapter.
Working from Home Means More Slack

The shift to working from home for hundreds of millions of people during the 2020 pandemic—some temporarily, some long-term, some permanently—has likely led to your company either adopting Slack or dramatically increasing its use as coworkers and managers try to keep a business running. You might even miss your colleagues and use work Slack for more personal communication than you would in an office.

This book helps you both feel more comfortable with heavier or more intense use of Slack and the etiquette of mixing personal and business use of this communication tool.

If you’d like more advice on working from home in the current era, you can download my free book, *Take Control of Working from Home Temporarily*. It’s packed with tips from dozens of people who have worked remotely or as freelancers from home for many years.

Workspaces

Slack workspaces divide topics of discussion into separate channels, which may be public (any Slack member may join the channel) or private (only its members see the channel). Members create, pick, or are invited to those channels, which are typically broken up by topic, department, or task (Figure 2).
Understand Privacy Constraints in Slack

Before we dive into how best to use Slack, you should understand what steps Slack takes to protect your privacy—both as a company and within the product they make. You may wind up communicating in public and private ways within a workspace, and you should rightly be concerned about who within your workspace (from a technical standpoint) and within your company or organization can see your messages, as well as whether Slack (the company) or anyone else—such as government entities—can view your interactions.

The answer has a lot of nuance and complexity, because it depends partly on who owns and runs your workspace, and partly on the pricing tier of the workspace, no matter who owns it.

How Slack Stores Your Data

Slack encrypts all data, both in transit and at rest, which means that all connections from Slack apps back to the Slack mothership are protected, and when your messages and files land in central storage, they’re also cryptographically locked.

However, Slack can decrypt 100% of your data. They possess all the encryption keys, and use security to prevent unwanted parties from gaining access to your data.

Slack has made the legally binding, somewhat convoluted statement: “Individuals authorized by Customer to access the Services...may submit content or information to the Services, such as messages or files...and Customer may exclusively provide us with instructions on what to do with it.” Although I am not a lawyer—and this doesn’t constitute legal advice—the gist is that the “Customer,” or “the organization that you represent in agreeing to the Contract,” owns everything...
submitted to the workspace. All users of the workspace agree that that organization (or person) owns that content, too.

But the company also must comply with any legal processes that require them to disclose information to law enforcement or a subpoena in a civil lawsuit.

Slack complies with a variety of data privacy rules worldwide that govern how they disclose what data they collects, how they store this data, and which third parties they work with that may handle customer data. Slack may also have to let their customers retrieve a full copy of any account-related data and request its disposal.

These rules are many and varied. The best known is the European Union’s General Data Protection Regulation (GDPR), in effect since May 2018, and which companies that do business in the EU and with EU citizens and residents have to meet. There’s also the California Consumer Privacy Act that went into effect January 1, 2020, that requires compliance for companies offering services to consumers in that state. Many countries and U.S. states have their own rules.

Slack stores their data for most customers largely in the United States and has some operations in Ireland. This doesn’t put it out of the reach of authorities outside the United States and the EU, but it does set a higher bar for pursuing access to customer data.

However, starting in late 2019, Slack began allowing customers at the Plus and Enterprise Grid tier to store their own data on servers in certain regions, which makes this issue much more complex.

Slack May Retain Editing History and Deleted Content

Paid plans offer retention policies that can either routinely delete old messages and files, or retain a history of all edited and deleted messages as well as all deleted files.

These kinds of options may be required by certain industries or businesses to meet regulations, customer requirements, or internal notions of secrecy and disclosure. For more granular details about message and file options, read Slack’s retention policy page.
Slack offers a set of regularly updated—some say, too frequently updated—client apps for all major desktop and mobile platforms, and for the web. The Slack apps talk to Slack’s back-end servers, retrieve data, and update what appears in the apps, like messages and images, in real time. Unlike a platform like Twitter, there are no third-party apps that mirror the functionality of Slack’s apps.

As you’re likely to be using Slack on multiple platforms, it’s worth noting that Slack’s native apps for macOS, Windows, iOS/iPadOS, and Android (plus betas for Linux platforms) receive updates on different schedules. Some changes may even appear in an app you use before you install an update from an app store or the Slack website. This can manifest itself in different text labels or icons within the app.

Slack didn’t harmonize their Android, iOS/iPadOS, and mobile/web apps very well for most of the company’s lifetime. That’s finally (mostly) a thing of the past in the updates released in March and May 2020 to desktop, web, and mobile apps. There are still a few rough edges, but they are relatively few compared even to 2019.

Note: Slack’s Linux support has remained in beta for years.

Before you can interact with Slack, you need to join a Slack workspace. Thus, the first thing this chapter looks at is handling a workspace invite along with how to Fill Out Your Workspace Profile and Set Up Two-Factor Authentication.

With those important steps out of the way, I then examine the pros and cons of using the web app, as well as covering how to Use the Web App, how to Install a Native App, and how to Sign In to a Workspace that you’ve joined.
Handle a Workspace Invite

If you haven’t created a workspace, you’ll be invited to join one via a message with an invitation link, which opens in the Slack web app. You’re allowed to use the same email address with as many workspaces as you want.

You obtain this invitation in one of four ways:

- In most cases, your workspace’s administrator emails an invitation to you. (These can be reissued if lost.) In paid plans, the invitation may have a customized message. In Figure 3, you can see an invitation to a Slack workspace called Aperiodical LLC.

![Slack Invitation]

**Join Aperiodical LLC on Slack**

Glenn Fleishman (editors@the-magazine.com) has invited you to join the Slack workspace Aperiodical LLC. Join now to start collaborating!

![Join Now Button]

**Figure 3:** A Slack invitation can be customized on paid plans, but the Join Now button is the important element.

- Some workspaces allow anyone with a given domain name in their email address to create an account. If that’s the case for you, in your web browser’s address field, enter [workspace-name.slack.com/signup](http://workspace-name.slack.com/signup), then enter your email address and click Create Account. Slack generates an invitation email message and sends it to you.
Master the Interface

In this chapter, I cover the many Slack interface controls that you see often. Once you are familiar with their functions, where to find them, and how to use them, you are ready to dive into the next chapters.

Most desktop apps take advantage of interface conventions and system menus provided by the operating system, but for the most part, Slack’s desktop apps don’t: they’re very much like the web app. Thus, a Control-click or right-click in Slack’s Mac and Windows apps has no real effect—though it may bring up a Back or Copy command, as if you were in a web browser. The system menus, such as File and Edit, contain almost nothing. Choose Slack > Preferences in macOS, and it opens the custom settings view in the native app. Most of the controls are found within the Slack window.

The upside of this is more consistency across every platform, including the web. The downside comes when you click and stare at interface elements, wondering how you get to options and settings. That’s especially true as you work back and forth between the desktop and mobile apps, since the mobile apps—particularly when viewed on a phone-sized screen—lack the space for the same interface elements. Most of the functionality does exist in the mobile apps, but accessing it tends to require an additional tap or swipe.

Examine the Slack Window

Although what you see where depends on which Slack app you are using, Slack’s interface has, at its heart, three elements: the Workspaces sidebar, the Main Sidebar, and the Messaging Area (Figure 12). Desktop and web apps also display a fourth area at times: a right-hand pane that shows up when you select certain items on the toolbar in the upper-right corner of the messaging area.
Figure 12: A typical Slack desktop window (middle). At top: The Workspaces sidebar with the current workspace outlined in white; in the messaging area (right), Slack discussion takes place. At bottom: The main sidebar highlights the active channel (left) and the Details sidebar (right) reveals specifics about the channel. At upper-right: The user avatar that, when clicked, reveals the personal settings menu. (Assembled from a screenshot from Slack.)
Post Basic Messages

The atomic unit of Slack is the *message*, a chunk of text with a unique time stamp that appears chronologically in a channel or conversation. In this chapter, I look at the basics of messages, ranging from the etiquette of what you say to the practical issues of composing, editing, deleting, and responding.

**Note:** In *Go Beyond Basic Messages*, I look at adding and managing message attachments, plus I cover two special kinds of text you can insert in the message timeline: snippets and posts.

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**Write a Message**

It’s easy to write a message in Slack! You can either enter it directly into an existing channel or conversation, or you can draft a message that you can revise later or post into any location.

**Post into the Message Timeline**

In any channel or conversation, with the insertion point or focus in the Message field, type some text: *Hello, world!* In a desktop or web app, press Return or Enter. Or, in any app, click or tap the send ➤ icon.

**Note:** As much as Slack regularized all its interface elements across platforms with March and May 2020 updates, the send icon remains slightly different. In all apps, it’s dimmed if there’s no text in the message field. Start typing, and on mobile, it lights up blue; in desktop and web apps, turns into a square green box with the paper airplane knocked out in white.

To put a line break within a message without posting it, press Shift-Return/Enter in desktop and web apps, or tap the Return key in mobile apps. Combining multiple paragraphs in one message minimizes notifications for people who receive an alert for everything that
happens in a channel. It also reduces the number of messages “consumed” for a free-tier account against the 10,000-message limit.

You can also paste text into the Message field. Rich-text formatting, including links, carries through.

Need to communicate more text or include more formatting than a message can contain nicely? Use a snippet or a post, discussed in Go Beyond Basic Messages.

**Tip:** If you mention a public channel in a message by typing a hashtag followed by its name, like `#general`, the name becomes a link in the posted message. Anyone with access to that channel can click the link to switch to it. (Slack has no equivalent to the hashtags used in Twitter or Facebook—if you prefix a word that’s not a channel name with a pound sign, nothing happens.)

**Tip:** If you’ve entered text into the Message field in one conversation, then switch to another conversation, Slack puts a pencil icon to the left of the conversation name in the main sidebar to indicate you’ve left unsent text there. This doesn’t sync across apps, however: it shows unsent text only within the Slack app in which you’ve typed it. In desktop and web apps, it also shifts the channel in the main sidebar to appear under a Drafts heading.

**Create and Post a Draft**

The addition in the March and May 2020 app releases of a “New message” button and a Drafts category allow you to compose messages you can post later. Drafts are held in individual apps, so messages you draft on your office Windows machine and your iPhone aren’t synced before posting.

To create a draft message without being in a channel or conversation:

- Click the “New Message” button in the workspace menu in a desktop or web app or tap the button in the main sidebar in a mobile app.

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Connect by Voice, Video, and Screen

Slack used to be all about text, images, and files. But, starting a couple of years ago, the service went multimedia and more. You can place audio and video calls and (in paid plans) share screens. Slack added these options for parity with other platforms and alternatives people have to staying entirely within Slack, like Skype and Zoom.

The options available depend on your workspace’s plan. Audio and video calls can be made in free plans within a two-person DM conversation. Only workspaces on paid tiers can initiate calls from a channel or a group DM, and those calls can have up to 15 participants. Screen sharing is available only in paid plans.

**Tip:** You can also incorporate apps for video-conferencing and VoIP services—including using some services that ostensibly compete with Slack! See Appendix A: Install Apps for more about apps.

Configure Your Hardware

Make sure you have the right headset, earbuds, or microphone in place before you get started.

Slack doesn’t let you configure video, microphone, and headset options until you’re engaged in your first call. Slack defaults to your system preferences; for instance, on the Mac it uses the input and output selected in System Preferences > Sound.

When your first call starts, click the gear ⚙ icon in the upper-left corner of the window right away to open the Settings popover and specify which audio and video input and audio output you want. *(Figure 61).*
Figure 61: If your system default choices aren’t what you’d like to use, select your preferred options.

To confirm that your mic works, speak into it while watching the volume in the Audio Settings popover, which appears as a dashed line. The more green dashes that appear as you talk, the louder you’re speaking. (These dashes are supposed to look like rectangular green LEDs, typical on audio equipment, but they aren’t sufficiently skeuomorphic enough to make that clear.)

To check that you’ve chosen the right headphones, earbuds, or speakers, click Test.

**Note:** Slack doesn’t let you configure what your audio input and output options are when you place a call using the web app or a mobile app. If you’re using an external device, plug it in and make sure any relevant audio system settings are in place, ideally before you start the call.
Work with Channels

Channels fall just below workspaces in the Slack hierarchy, letting workspace members communicate in a topic-based structure. I would wager that despite a lot of communication in conversations, the vast majority of interaction in Slack happens in channels.

A channel has either a hash # or a lock ⚠ icon to the left of its name wherever it appears in Slack, which respectively indicate whether a channel is public or private.

**Note:** Private channels appear in your list only if you’re a member of that channel; even workspace admins don’t see private channels unless they’re a member.

Every Slack workspace starts with two channels populated by the system: `#general` and `#random`. From there, workspaces chart their own course.

**Note:** Some workspaces may change the names of these initial channels to something more descriptive.

In this chapter, I’ll explain how to join an existing channel, how to Create a Channel, and how to Interact in a Channel.

Join a Channel

As noted just above, Slack has both public and private channels. You can search through a directory for public channels to join, or you can be invited by someone who is part of a channel already. You have to be invited to a private channel.

**Find and Join a Public Channel**

You can find available public channels in several ways, depending on the Slack app you’re using.
Use the Channel Browser
At the top of the main sidebar in desktop and web apps, click Channel Browser. In mobile apps, tap it in the Workspaces view. The list includes all public channels you can join and all private channels you are a member of. The default view is in alphabetical order.

Tip: You can also click the icon next to the Channels category label in desktop and web apps and select Browse Channels.

Each app shows something slightly different:

- **Desktop and web apps:** Slack displays the number of members and the channel description (Figure 71). At the top of the directory, the Search field, Sort pop-up menu, and Filter button let you customize the view. For instance, use Sort and Filter to show the newest channels created of which you are not a member. You can also click create Channel to make a new one, discussed later.

![Channel browser](image)

**Figure 71:** The channel directory shows each channel you can join along with its description.
Conduct Direct Message Conversations

In Slack, direct messages, also called DMs, are used for one-on-one conversations and for group conversations with up to nine people total.

Unlike a channel, which has a descriptive name—like #acct-general or #edit-general—the title of a DM conversation in the sidebar is based on the people with whom you’re conversing—like Josh Centers, Adam Engst—and always remains the same. DM conversations are analogous to instant messaging or group messaging. In fact, these conversations can replace your use of an instant-messaging (IM) service, such as SMS, Signal, iMessage, or Google Hangouts.

Slack suggests, and I agree, that group DMs are best suited for brief interactions among a static group of people. If you want to add or remove people, a channel works better (see Work with Channels).

Tip: If your DM conversation persists, you can convert it to a private channel in a desktop or web app. Click the channel header, click the More icon, and choose “Convert to private channel.” Confirm, then name the private channel.

All DMs may be viewed and searched only by the participants, a fact that may be incidental for some interactions but essential for others—in fact, only members can even see that a DM conversation exists. If privacy is paramount, you may prefer to set up a private channel, which offers more flexibility; for details, see the sidebar DM Conversations vs. Private Channels, earlier.

Note: A file uploaded to a DM may be viewed only by the participants in that conversation. After it’s uploaded, the file appears with the label “Private file” underneath its name when you view it.
Guests Have DM Limits
If you are a single-channel guest, you can communicate via direct messages only with people who are participants in the channel to which you belong. The exception is #general, which lets you message with everyone—except other guests who aren’t joined to #general.

Multi-channel guests automatically belong to #general, so they can start conversations with all regular members, multi-channel guests, and single-channel guests joined to #general.

Start a DM Conversation

Start a DM conversation by clicking or tapping the “Open a direct message” icon next to Direct Messages in the main sidebar to open the Direct Messages dialog.

You can also use the Quick Switcher. Press ⌘-K/Control-K (desktop, web) or click or tap in the “Jump to” field (mobile apps) and start typing the name or handle of a person in the DM conversation to find matches. Click the conversation name once you find it. Using general search in every app works, too.

Tip: These searching methods also reveal older conversations that may have scrolled off the main sidebar’s list of recent conversations.

While viewing the Direct Messages dialog (or New Conversation view in iOS and iPadOS):

• **Desktop and web apps:** Select, type, press ↑ or ↓, or use auto-complete to add people to the “Find or start a conversation” field. Click Go when you’re ready to start (Figure 81).

![Direct Messages](image)

**Figure 81:** Select participants and click Go.

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Configure Notifications

Slack has a fine array of options to notify you about things that happen in channels and conversations. The service also supports the notion of presence, a term for how your availability appears to other people on your workspace. Slack adjusts how it notifies you depending on your presence, and people in your workspace can view your status to determine whether you’re likely to see a new message in Slack or be notified of one. The presence-related features in Slack are not as rich as in some other messaging systems, but presence is a key part of Slack interaction, so it’s worth mastering the nuances.

I’ll begin by explaining how your presence is determined, and then help you Control Slack Notifications so that you receive precisely the kind of visual indicators and notifications that match your needs, workspace by workspace and channel by channel. The chapter ends with directions for overriding Slack’s notifications at the operating system level, in Control Slack Notifications on Your Device.

Make Your Presence Known

Presence is a techie term that combines both “where you’re at” and “what you’re doing.” It’s used by systems to make a determination about when to avoid bothering you, as well as by people who want to know what’s up with you.

If you have more than one device signed in to the same Google account, or have multiple iOS, iPadOS, and macOS devices that share the same Apple ID for iMessage and iCloud services, you probably know what I’m talking about. When you receive a message, all your devices and computers may alert you at once—terrible! But if everything is configured and the system obeys your settings, only the hardware you’re actively using pings you. The other devices remain silent or display a quiet notification.

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In Slack, your presence can let other group members know whether you’re available, though Slack doesn’t offer enough gradations to be as useful as most other messaging systems.

The four presence modes—explained in depth below in Set Your Presence—are: active, away, inactive, and Do Not Disturb. (Slack sometimes refers less formally to Do Not Disturb as snoozing.) In some cases, Slack will automatically switch you into a different mode, while in others, your actions set your mode.

You can also set a custom status field to tell people what you’re currently up to; it expires after a period of time you choose.

What Your Presence Reveals

Slack indicates presence for each member of a workspace with a small round ○, square □, or right-triangle △ icon that appears to the left of their name in the main sidebar’s Direct Messages list and on the right in their profile, among other places. This icon lets you see at a glance what someone’s current state of activity is in the workspace.

To see your current presence in desktop and web apps, look to the right of your profile picture at the far right of the navigation bar (Figure 84). If you choose an emoji it appears here as well; hovering over the area reveals the current status, described below in Set Your Status. In mobile apps, tap the You ▼ button, and look at the overlay on your avatar.

![Figure 84](image-url)

**Figure 84:** Your presence appears to the right of your picture. Here, I’m an active member who is away.
Search Effectively

Because Slack works quite a bit like a message-based social network or instant messaging system, important information often scrolls off the top of the screen quickly in active conversations.

Finding that information later has a high value, and this short chapter covers some important ground by detailing how to get the most out of Slack’s Search feature. Unlike a typical search engine, Slack provides context around search results, making it easy to see the portion of the discussion in which they occur.

What Text Does Slack Search?

Slack’s search finds matches from within your personal set of searchable content:

✦ All public channels (active and archived). Full members can restrict searches to only public channels they’ve joined, while guests see only results from those channels.
✦ All active private channels in which you remain a member, or, for archived channels, were a member at the time they were archived.
✦ All your direct messages and group DMs.
✦ The contents of all files uploaded or linked for indexing (via Google Docs and other services) that are accessible to you.

**Note:** As always, this only applies to the most recent 10,000 message in free plans.

Compose Queries

Every Slack app has a search option in the messaging view, whether it appears as a full Search field or a Search icon you tap (in the mobile apps). You can type /s in the Message field.

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Tip: You can also invoke it in desktop and web apps via ⌘-F/Control-F. However, when you use a keyboard shortcut, Slack constrains the search to the current conversation, as discussed later.

**Query Any Terms**

Slack lets you type freeform queries. For instance, if you search on *apple*, the app sends a query to its central store of your workspace’s messages and brings up every message and uploaded or directly linked file that contains *apple*—but only from conversations to which you have access, which can include all public channels.

Tip: As you start typing in a query in a desktop or web app, Slack tries to match it against the channels, workspace members visible to you, and previous searches, and shows those.

You can enter more specific search terms to refine your search. This is useful when you’re looking for something particular or when you get too many matches from a general search query—or not enough.

You can start by restricting matches to phrases by putting a set of words in quotation marks, like "*iPhone malware*".

To make a broader match, try wildcard matching by adding an asterisk (*) at the end of a full or partial word. The word stub has to have at least three letters before the asterisk. For instance, if you want to find *detail, detailed, details*, and *detailing*, you could search on *detail*.

**Stop Words**

Like many systems, Slack has a set of words their apps ignore in general searches because they occur too frequently; these are called *stop words*. Slack no longer publishes their list, but it used to comprise *a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, s, such, that, the, their, then, there, these, they, this, to, was, will, and with*.

Slack matches these words when they’re used as part of a phrase in quotation marks, however.

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Chat with Slackbot

Although Slack workspaces are primarily populated with real people, every Slack workspace includes a *bot*, a non-human automated interaction system, called Slackbot. With a presence icon in the shape of a heart 💚, Slackbot is your plastic pal who’s fun to be with (to quote *The Hitchhiker’s Guide to the Galaxy*).

**Note:** Slackbot isn’t an app as such, even though other bots you can install into a Slack workspace are, because it’s part of Slack and can’t be removed. It also isn’t configured in the same way as third-party connections to your Slack workspace.

When you join a workspace, Slackbot welcomes you and offers some introductory topics about which you can learn (Figure 98). It’s your concierge in conversations, too, talking to you privately when you paste in a link (such as to Google Drive) or use an app to certain external services for the first time, like the project-management system Asana: Slackbot asks about your preferences for how Asana works with Slack and stores your answers in your Slack account in that workspace.

![Figure 98: Slackbot says hello and offers suggestions.](image)

Slackbot was designed to be fun and not annoying, but it’s also useful: Slack relies on Slackbot to send you alerts, and you can ask Slackbot to set reminders.

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Slackbot’s Public and Private Voices

Slackbot has two kinds of interactions with workspace members: public and private. When there’s a channel reminder (described below) or a sassy automated keyword response (also described below), Slackbot posts a public message. These public messages are things that everyone in a channel or conversation sees, and they appear in the same type style as members’ messages.

However, when Slackbot interacts with you directly, those messages are private. To emphasize that, Slack puts the note “Only visible to you” above or to the right of its name in the message. Slackbot messages to you are further highlighted by either a gray tone appearing behind its private messages or the text appearing in gray.

Watch for Alerts

When something happens in Slack that you should know about, you get a message from Slackbot, typically in the channel or conversation in which you’re already focused.

However, events can happen elsewhere, and Slackbot tracks those too. A notable case is when someone else @mentions you in a channel in which you are not a member. Slackbot asks them whether to invite you or send you a link. In a private channel, the Let Them Know option to share a link doesn’t appear (Figure 99). For any action other than Do Nothing, you hear from Slackbot (Figure 100).

Figure 99: When I @mentioned Joe in a channel that he hadn’t joined, Slackbot asked ask me what to do.
Appendix A: Install Apps

Slack wants to provide more features—way more features!—than the company could ever create on their own. Their approach is to be a platform upon which other services can build. This commitment, and third-party developers’ embrace of Slack, has become one of the best things about the service.

Making conduits to other ecosystems possible, and providing access to extra single-purpose tools, even tiny ones, makes Slack richer and more useful. Slack calls these third-party connections apps.

**Note:** Slack’s previous development approach was called “integrations,” and some legacy integrations may still be found in older Slack workspaces. Slack recommends replacing them.

For example, your workspace may be using an app that ties into a task-management system like Trello or JIRA to push certain notifications into a Slack channel or to you via a direct message. Apps also include automated-response systems, or bots. A bot appears like another workspace member, and can respond to a variety of requests, from ordering a pizza to updating a linked calendar.

All workspaces include Slackbot, which is built by Slack and a key part of how Slack “talks” to you privately about things happening in Slack. I discuss Slackbot earlier in Chat with Slackbot.

**Note:** Paid workspaces can install unlimited apps; free workspaces can add up to 10. With free workspaces, the Google Drive, Dropbox, Box, and RSS feed options count as apps, and are added the first time they’re invoked. With paid plans, several apps, including Google Drive, are shown as available even before they’re linked to a remote account, as they’re so commonly used.
Explore Common Slack Apps

You might assume that certain apps are just part of Slack if you belong to multiple workspaces, because so many Slack workspaces install the following apps:

- **Giphy**: With Giphy installed, type `/giphy` followed by one or more words and the animated GIF site’s extensive archives are combed for keyword matches, and an “appropriate” randomly selected entry is previewed for you to select from. Click Send to post, Shuffle to find another one, or—often—Cancel because the result wasn’t appropriate or germane. It’s like visual punctuation.

  **Tip:** If you find animated GIFs annoying or inappropriate, use `/collapse` or lobby your group to remove the Giphy integration.

- **Google Calendar**: With Google Calendar, you can push calendar events and reminders from a shared calendar into a channel, helping people remember what’s coming up (**Figure 103**).

![Image of Google Calendar event reminders]

**Figure 103**: Google Calendar can remind you of upcoming events, among other things.

- **Slack for Outlook**: You can bridge email from Microsoft Outlook with this tool, which lets people essentially forward email and email threads into Slack for a different mode of communication.

- **Zoom**: The extraordinarily popular videoconferencing service Zoom can create sessions through its Slack integration. Type `/zoom` by itself, and Slack collaborates with Zoom to create a new meeting and corresponding password (**Figure 104**).

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About the Author

Glenn Fleishman has written thousands of articles over decades for publications like the *Economist, Macworld, TidBITS, Atlas Obscura,* and *Smithsonian.* He’s also written dozens of editions of books for Peachpit Press and in the Take Control series, and writes regularly about printing and type history.

Glenn has devoted his career to writing that helps people understand and better use technology. He lives in Seattle with his wife and two children and many, many mobile devices and computers.

(Thanks to Jeff Carlson for my author photo.)

Shameless Plug

Glenn’s most recent print book is a deep dive into the past, both in content and form. *Six Centuries of Type & Printing* tracks the development of moveable type from before Gutenberg, through his invention of a consistent, reproducible printing process, and on to the modern digital era. The 64-page book was set in hot-metal type, printed by letterpress by a printer with decades under his belt, and bound in hardcover with foil stamping by a family-owned firm in Germany near the Black Forest. You can order a copy from a limited edition; it’s also available as an ebook. Glenn wrote and produced this book as part of his Tiny Type Museum project. You can help support his historical writing via his Patreon page.

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alt concepts inc. 4142 Adams Ave. #103-619, San Diego CA 92116, USA

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