

Welcome to Ipswitch Instant Messaging

What is Instant Messaging (IM), anyway?

In a lot of ways, IM is like its cousin: e-mail.

E-mail, while it's certainly much faster than the traditional post office system, works like a normal mail delivery system in that you must send a message with no way of knowing when the message will be delivered or retrieved.

IM allows you to get an instant response to your sent message; for this reason, IM varies significantly from e-mail because it allows you to engage in an online conversation. Sending a message opens up a window in which you can type messages that both you and your contact, or contacts, can see and read. And, because Ipswitch IM provides an Online Status indicator, you always know who's logged on and ready to receive a message.

Logging On

For most users, the IM network will start when the computer is turned on; however, there are several other ways to log on to the Ipswitch Instant Messaging network. For simplification, the following instructions demonstrate how to access the IM network through the Windows Start menu.



Your user name is your complete email address.

Your password should have been given to you, if not, please contact the MIS Department

To log on, complete the following steps:

1. Click Windows Start, Programs.
2. Scroll up to and select **Ipswitch IM**. The IM Logon dialog displays.
3. Enter your account and password information and click OK.
4. Stored Conversation message telling you how long your messages will be saved on the server displays. Click OK.
5. The IM network's Main Window displays.

Main Window



After Logging on to the system, Ipswitch Instant Messaging's primary or Main Window displays. The Main Window contains the Public and Personal Contacts lists. Additionally, the Main Window provides central access to all application functionality and options.

Menu Items

Action: This menu list allows you to select Send Messages , New Contact , Edit, Delete and View Contact, New Group , Log on , Log off, Log off with Status , Refresh Online Status of the Public Contacts list, and to Close the IM Client.

View: This menu list contains Show only Online Users , Offline Messages and system Options .

Help: This menu list includes Help topics and Ipswitch's Instant Messaging support items.

Contact Lists

Comprising the largest area of the Main Window, these are expanding topics or sections that reveal both the system administrator's assigned Public Contacts and your Personal Contacts lists.

Public Contacts is a public list that contains all users who have been granted access to Ipswitch Instant Messaging. Only the system administrator can add new users to the Public Contacts List. This listing does not, however, contain the names of all users.



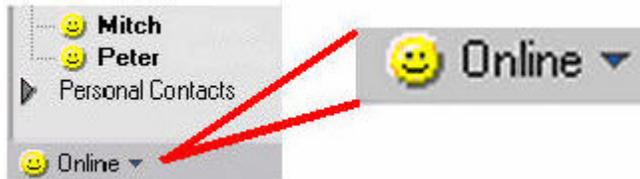
Personal Contacts is the section that contains your Personal and Group Contacts Lists. Contacts listed on this list appear only on your Personal Contacts List.



Online Status

Displayed at the lower left-side of the Main Window, this drop-down menu provides a way to indicate to other IM users about your Online Status. That is to say, this is an indicator of your availability to take part in an IM conversation.

IM Courtesy: An Online Status indicates you are available to receive and participate in IM conversations.



Conversation Window

The Conversation Window's primary purpose is to allow you to participate in an IM conversation. It's comprised of an upper and a lower window.

Upper Window is the top panel of the Conversation Window.

The upper window, the larger of the two windows, contains the Conversation Read window. This window displays the full context of your IM conversation; to include: conversation text, attached files, and Emoticons. The upper window also contains actions, formatting, file attachment, and help options menus.

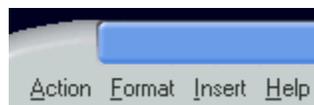
Minimize, Maximize, and Close or Hide buttons



Minimize This sends the Conversation Window to the Windows tray. In the minimized state, the conversation is still active.

Maximize Pressing this button causes the conversation window to fill your monitor's screen. Pressing it again causes the Conversation Window to return to its previous size.

Hide or Close Hide or Close **will not end the IM conversation**. Pressing this button only closes Ipswitch's IM Conversation Window. As long as some part of the conversation is kept active on the IM server or on another user's computer, the conversation can be reactivated.



Conversation Window Menu

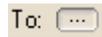
Action contains the options you need to Send a message, Add a User to the conversation, Block a user from further IMs, permanently end a conversation (select Goodbye or leave), or Close the Window.

Format contains the items used to change the appearance of your typed message's text.

Insert contains the file attachment and Emoticon options. (Also see: Conversation Tools.)

Help is provided for the Conversation Window dialog (Note: you can press F1, too.) Access to the system's user's guide is also provided in this menu item.

To or Add user button This is one of your options for Adding Another User to your active conversation.



Conversation Read This window, within the upper window, is where the context of the entire IM conversation displays. From here, you can scroll back through the conversation or download attached files. All conversations are stored, for a period of time determined by your IM Server's administrator, on the IM Server. And, as long as the conversation is kept active by at least one online participant or stored on the IM Server in an offline message, the conversation (in its entirety through use of Full Context Messaging) can be reestablished and continued.

Lower Window is the bottom panel of the Conversation Window. The Lower Window, the smaller of the two windows, contains Conversation Write window, the Conversation Tool set, and the Send message button. The Lower window is where you type your message.

Conversation Tools provide you with another way of inserting a file or editing your text.



Conversation Write. The larger part of the lower panel, the Conversation Write window is where you type your message, attach a file, or insert an Emoticon.



Send Button. After typing your message, click Send to insert your message into the IM conversation. Send is not enabled until you type a message.

Sending an Instant Message (IM)

After **Logging on** to Ipswitch's Instant Messaging network, you can easily send an IM to any Ipswitch Instant Messaging user.

Things to know:

- Your message can, for all intents and purposes, contain an unlimited number of characters; however, your IM administrator may set a limit.
- While a user's Online Status indicates whether he or she is available to actively receive and participate in IM conversations, you have the ability to send your contact an Offline Message.

To send an IM, complete the following steps:

1. From the Main Window, select a contact or contact group from the Public or Personal Contacts List.
2. On the toolbar, select Action.
Then select **S**end Instant Message.
OR, **right click** the contact or group and select **S**end Instant Message.
The Conversation Window displays. From there, you can write and send your message.
3. In the Conversation Window, type your message in the Lower Window and click Send.
4. When your message is sent. A copy of it displays in the Conversation Window's upper window.

Send an IM to More Than One Person

Ipswitch Instant Messaging makes it easy to send an IM to more than one person. After **Logging on** to Ipswitch Instant Messaging, you can send an IM to as many people as you want to include in your conversation.

To Send an IM to Multiple Contacts, complete the following steps:

1. From the **Main Window**, select a Contact or Contact Group from the Public or Personal Contacts list.

How to select multiple contacts:

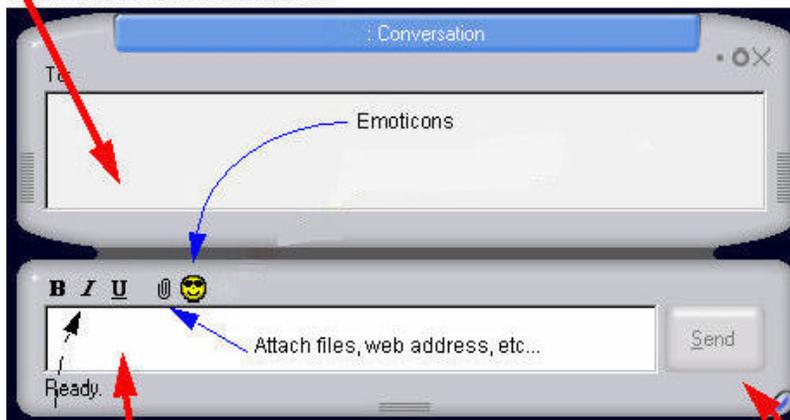
- a) Click **Ctrl** and then, using your mouse, select each person, group, or combination thereof you want to include in the IM.
- b) If contacts are listed consecutively, highlight the first contact's name and then click the **Shift** + either of the  or  keys.

2. From menu items on the toolbar, select **Action**.
3. Then select: **Send Instant Message**.

OR, after making your selections, **right click** on (one of) the intended contact (s) or group (s) and select: **Send Instant Message**.

4. The **Conversation Window** displays; now, you're ready to write and send your message.

Conversation Read Panel: This is where the content of the entire conversation is listed.



Message Text Formatting

Conversation Write Panel: Enter your message, here. This is where you talk.

After keying in your message, send it by pressing the Send button.

5. Type your message into the Lower Window and click Send.
6. When your message is sent, the original text disappears from the bottom panel, and a copy of it appears in the Upper Window.

IM NOTIFICATIONS – Receiving an Instant Message (IM)

IM Notification While Logged On

When an IM user sends a message to you, the system can notify you in two ways:

1. **Visual:** Flashing: The system starts a flashing Conversation tile on the task bar when a message is received.
To open the IM, click the flashing tile. The Conversation Window appears.
2. Bring window to front on new message: When selected in the General Options page, this option causes the Conversation Window to appear in front of all running applications on your desktop.
3. **Sound**: The system causes your operating system's default sound to play when a message is received. Sound notification is a user function set on the General Options page.

To open the IM Click the flashing tile. The Conversation Window appears.

IM Notification While Not Logged On

If you are not logged on to the Ipswitch Instant Messaging network when another user initiates an IM conversation, the next time you log on to the network you will receive a system generated message notifying you that, while you were logged off, you received an Offline IM conversation.

Opening an Attached File

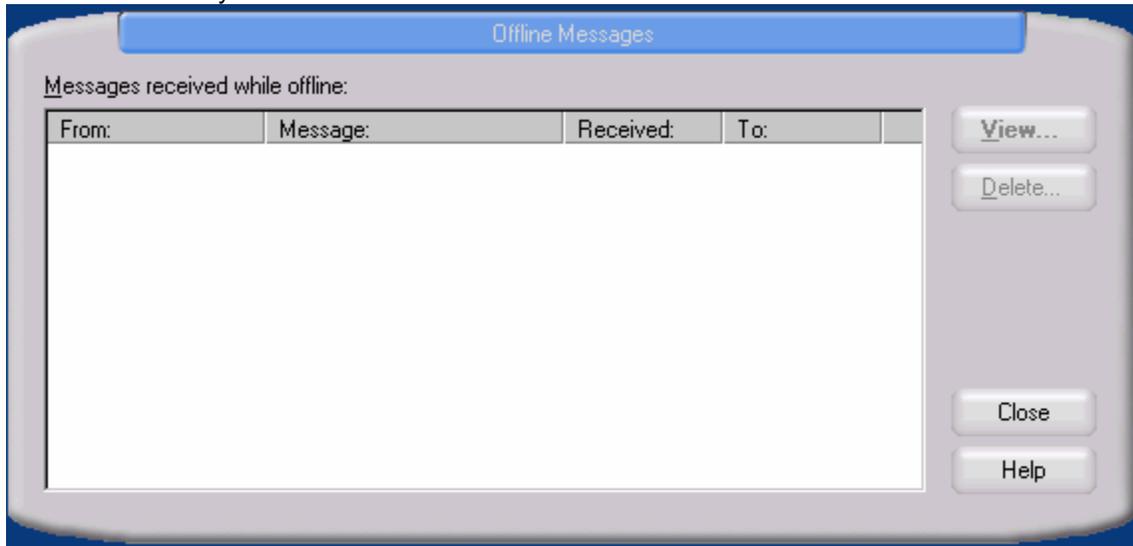
Attached files display in the Conversation Window's Read or Upper Window. These attachments are in-line (embedded in the conversation); because of this, attachments are easy to retrieve.

Two Methods of Opening an Attached File:

- 1 Right click the attached file.
 - a. A menu listing containing download options displays.
 - b. **Run** is the system's default action, but you can **Save** the file or tell it which application to use to **Open**.
- 2 Access the attachment as if it were a hyperlinked item by double-clicking the attached file. The attachment downloads to the Windows Temp folder and launches itself on your desktop.

Offline Messages

Even when you aren't logged on to Ipswitch Instant Messaging, it's possible for a user to initiate an IM conversation with you.



An offline conversation is stored on the Ipswitch Instant Messaging Server and, after you log on, the system will generate an Offline Message notification letting you know an offline IM message has been received and saved. The stored message is contained in the Offline Messages page.

To Accept and Continue the Conversation:

Select one of the following two ways to accept and view Offline messages.

- a. Just after logging on, select **Yes** on the system generated Offline Message notification.
- b. Or, if you chose to view the message later, go to the Offline Messages Page. This dialog is accessed from the Main Window through the **View** menu. Once there, select the conversation from the list box and click View

Then, providing, of course, that the user who sent the message is online, the conversation will become a live conversation. If, however, that user \ contact is not online, then he or she, upon logging on, will receive an Offline message notification telling them of your message.

If You Do Not Want to Accept or Continue the Conversation:

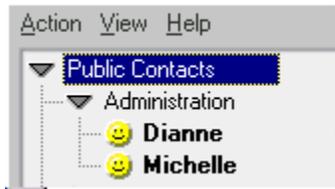
Select the conversation from the list box and click **Delete**. The selected conversation will be deleted.

The contact user who initiated the IM conversation will not know if you received the message, deleted it, or whether you just chose not to respond.

Public Contacts List

Generally, the Public Contacts List is catalog or directory of all public users who have access to the Ipswitch Instant Messaging network. The Public Contacts List is very much like a public telephone book. That is to say, in a public telephone book most telephone numbers are published; however, some, of

course are not. And, the same principle applies to the IM Public Contacts list, too. Not all IM users must be listed on the Public Contacts List.

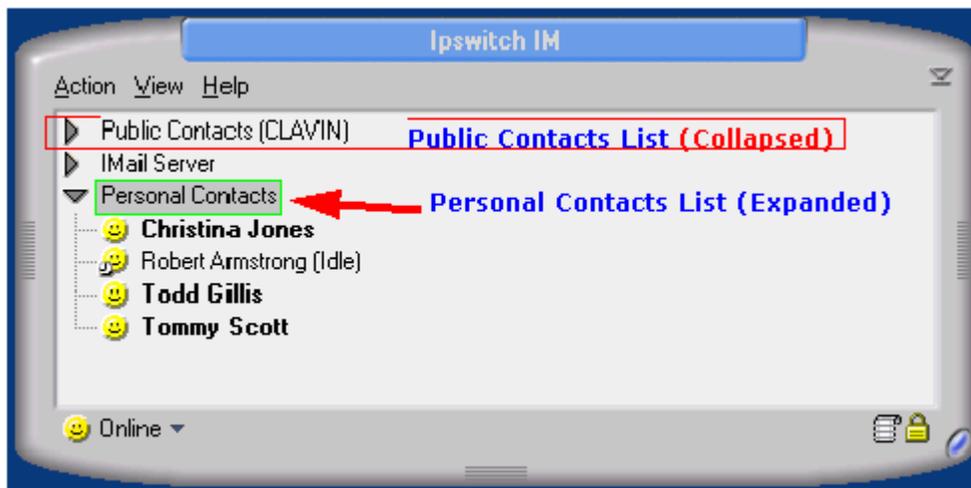


Things to know about the Public Contacts List:

- You can't add, edit, or delete any information on this list. Only the IM administrator has the ability to add or edit Public Contacts List information.
- If you want to contact an unpublished user, you'll first need to obtain the contact address information and add the unlisted user as a Personal Contact
- The Public Contacts List is the primary section (contact grouping) on the **Main Window**.

Personal Contacts List

This list displays below the Public Contacts list on the **Main Window** of the Ipswitch Instant Messaging network, and it contains the contacts or groups you've added to your Personal Contacts list. The ability to add or edit a new Contact or Contact Group is highly useful because you can organize your contacts into groupings and associate additional information with each contact in a way that works best for you.



Think of the Personal Contacts list as a private address book.

Remember: The Personal Contacts List is not the same as the Public Contacts List. Only the IM system administrator can add or remove a contact or group on the Public Contacts listing, but you, however, have total control over your Personal Contacts List. And, your Personal Contacts List is completely private.

Adding an IM Contact

Ipswitch Instant Messaging enables you to easily add a new contact to your Personal Contacts List. The ability to add a new contact is beneficial because it allows you to organize unpublished or existing contacts listed in the Public Contacts list into groupings that work best for you. To Add an IM contact, complete one of the following two processes:

Manual Process:

1. From the Main Window , select or highlight the Personal Contacts.
2. On the toolbar, select Action.
3. Then select:  **+ New Contact**
OR, right click on Personal Contacts and select:  **+ New Contact** .
4. The New Contact dialog window displays.
5. Next, in the contact address text box, type the new contact's location information. This is the contact's user account.
6. After typing the location information, click **Next** .
7. The **Contact Information** panel displays. You can accept the name, as provided by the system, or alter it to reflect your own preferences.
8. When you've finished entering or altering your new contact's information, click Finish .
9. The Main Window displays. Under Personal Contacts, your newly added contact is now visible

Drag and Drop Process:

Click and hold the person or group listing in the Public Contacts List.

1. Drag your selection to and over the Personal Contacts section heading.
2. Release your selection over the Personal Contracts section heading.
3. Under Personal Contacts, your newly added contact is now visible

Adding an IM Group

Ipswitch Instant Messaging allows you easily create a group (folder) in your Personal Contacts list. The ability create new groups (or associated folders) is beneficial because it allows you to organize unpublished or existing contacts listed in the Public Contacts List into groupings that work best for you.

To Add a New Group, complete the following steps:

1. From the Main Window, select Personal Contacts.
2. On the toolbar, select Action.
3. Then select: 

OR, right click on Personal Contacts and select: 

4. A New Group dialog window displays.
5. Key in the name of the group and click OK.

Note: Group names are limited to 64 characters.

6. The Main Window displays. And, under Personal Contacts, your newly added group is now visible.
7. Next, you must add your contacts to this group. (Follow instructions for adding a contact provided in: **Adding a New IM Contact**.)

Contact Address

Contact Address is an Ipswitch Instant Messaging dialog used to create a new or edit an existing contact's location or account information. The Contact Address information is usually entered in a standard e-mail like address format.

To Add a New Contact's Address:

1. From the Action menu, select New Contact. The Contact Address dialog displays.
2. Enter the location or account in the Contact Address text box.
3. After entering in the address information, click **next** .
4. If the entered location information is correct, the Contact Information dialog displays; from there, you'll be able to complete the Adding a New Contact process.

To Edit an Existing Contact's Address:

1. From your Personal Contacts List , select the contact's address you want to edit.
2. From the Action menu, select Edit Contact. The Contact Address dialog displays.
3. Alter the location or account information in the Contact Address text box.

4. After making your changes, click **next** .
5. If the entered location information is correct, the Contact Information dialog displays; from there, you'll be able to complete the contact's information edit process.

Contact Information

The Contact Information dialog allows you to create and save additional information about people you've added to your Personal Contacts List. This dialog is used to create and edit telephone numbers, additional e-mail addresses, cell phone or beeper numbers, and any additional information associated with each contact address or account.

Display Name is an optional text box in which you can enter a text description. (usually your contact's first name)

Contact Properties is the area containing all previously saved information that has been associated with the contact address or account; for example: home e-mail address, cell phone, and any other relevant contact information.

Note: The Contact Information dialog can only be accessed by pressing Next on the Contact Address dialog.

To Create New Contact Properties Information, complete the following steps:

1. From the Contact Information panel, click New .
2. The New Property dialog panel displays.
3. In the Property Name list box, type, or select from the list, the name of the item you want to associate with the contact; for example: e-mail, telephone, cell phone, or pager.
4. Next, bring the Property Value text box into focus. It's in this text box where you actually enter the information associated with the description listed in the Property Name text box.

If, for example, the Property Name is "Home e-mail," the associated Property Value would be entered in an e-mail format; for example:

ContactsName@herhomeEmail.com.

5. Click Ok .
6. The Public Information dialog displays. And, the newly created information is now listed in the Contact Properties container.
7. When you've finished creating New Properties, click Ok to save your changes.

To Edit Existing Contact Properties Information, complete the following steps:

1. From the Contact Information panel, select an item in the Contact Properties container.
2. Click Edit.
3. The Edit Property dialog panel displays.
4. Make your changes to the property and its associated value, and click Ok .

5. The Public Information dialog displays. And, the newly edited information is now listed in the Contact Properties container.
6. When you've finished editing, click Ok to save your changes.

Online Status

Online Status is a visual representation of your online presence. That is to say, your online status signals to other users whether or not you are online and, if so, that you are available to **start an IM conversation** session.

Ipswitch Instant Messaging also allows you to log on **invisibly**. Logging on invisibly means that, although you have logged on to the system, your status, as it appears to other users, shows that you are offline.

And, Ipswitch Instant Messaging allows you to be creative, too. You can select a pre-set status message or **Create or Edit** your own Status message.

IM Courtesy: An Online Status indicates you are available to receive and participate in IM conversations.

To Change your Status While Logged on, complete one of the following actions:

1. From the Main Window, under the Public and Personal Contacts lists on the lower left of the screen, click the Online option list.
2. The Status option list displays.
3. Scroll down the list and select one of the options from the listing.
4. The new Status displays on the Main Window.

Or

1. From your computer's task tray, right click on the Ipswitch Instant Messaging icon.
2. A list displays. Scroll up the list and select **Change My Status**.
3. The Status option list displays.
4. Select an option and release.
5. The new Status displays on the Main Window.

Offline Status

This is a message you want associated with your off line status. In other words, this message is displayed to other Ipswitch Instant Messaging users after you log off. The Offline Status feature is useful when you want to provide a short explanation about why you are not logged on.

Examples of Offline Status message include the following:

- On vacation until July 25
- Traveling to the Winnipeg office

- At customer location until Friday

Note: The Ipswitch Instant Messaging Server remembers your last entered message.

To Change your Offline Status:

1. From the Main Window, under the Action menu, select **Log Off with Status**.
2. The Offline Status dialog displays.
3. Type your message in the text box and click **OK**.

Or

1. From your computer's task tray, right click on the Ipswitch Messaging icon.
2. A list displays. Scroll up the list and select **Log Off with Status**.
3. The Offline Status dialog displays.
4. Type your message in the text box and click **OK**.

Remember: You will not see your status change; your offline status is visible to other Ipswitch Instant Messaging users only after you've logged off.

Creating and Editing Status Messages

While Ipswitch Instant Messaging comes with a list of pre-set Online Status messages, you may easily edit the pre-set messages or create your own.

IM Courtesy: An Online Status indicates you are available to receive and participate in IM conversations.

To Create a Status Message, complete the following steps:

1. Found on the lower-left of the Main Window, click the Online status icon.
2. An Online Status list displays.
3. Scroll down the list and select Edit Status Messages.
4. The Custom Status Messages dialog displays.
 lick New.
5. The New Status Message dialog displays.
6. In the Status Message text box, type your message. **The maximum length of a status message is 80 characters.**
7. Select an icon to go along with the new message.
8. Assign a hot key o your new Status Message. (Optional)

9. Click **Ok**.
10. The Custom Status Messages dialog displays.
11. Click **Ok** to save your changes.
12. The newly created Status Message is added to your Status list.
13. The Main Window displays.

To Edit a Status Message, complete the following steps:

1. To Edit an existing Status Message, select it from the Custom Status Messages list and click **Edit**.
2. Make your changes and click **Ok**.
3. The edited Status Message is added to your Online Status list.
4. The Main Window displays.

Being Invisible (Appearing to be Offline)

This option gives you the ability to appear, to other users, as if you are not logged on to the system. Ipswitch Instant Messaging provides you with two ways to set your status to invisible.

To Log on Invisibly, or change your status, complete one of the following actions:

A. Logging on invisibly.

During the Logon process, as shown in the following graphic, select **Log on Invisible**, and then click **Ok**.



B. Changing your status while logged on.

To do this, complete the following steps:

1. From the Main Window, under the Public and Personal Contacts lists on the lower left of the screen, click the Online option list.

2. The Option list displays.
3. Select the Invisible option.

Blocking a User

This feature is useful if you receive lots of unwanted IM messages from the same user. Ipswitch Instant Messaging gives you the ability to stop a user from sending you further messages.

What should you know about blocking a user?

- Users can only be blocked from the Conversation Window during an active conversation in which the user you want to block is the IM originator.
- Blocked users may continue to send messages, but the server will block those messages from being delivered.
- The IM system will not notify you of any received Offline messages from anyone on your Blocked Users list.
- The IM system will notify the blocked user that his or her messages are being blocked.

Blocking a User is a Semi-permanent Action.

This option works like a filter. Once you block a user, he or she will not be able to send an IM to you until you remove him or her from your Blocked Users list on the Privacy Options page.

To Block a User, complete the following steps:

1. From the Action menu on the Conversation Window's Upper Window, select **Block all Message from...** (the person you want to block). A confirmation box displays.
2. Click **Yes** to block the user or click **No** to stop the block process.
 1. **Yes** blocks the user from contacting you and closes the conversation window. The blocked user's name now displays in My Blocked User's list on the Privacy window under Options .
 2. **No** cancels the action and returns you to the conversation.

Closing the Conversation Window

Closing the Window doesn't end the conversation. Each time a participant sends a new message line as part of an existing conversation, the IM conversation will reactive and continue, through Full Context Messaging, on your desktop. Unlike the Goodbye (Leave an IM Conversation) option, closing the Conversation Window only minimizes the conversation.

Remember: When you Close the Conversation Window, the actual conversation is not ended. Only your Conversation Window is closed.

To Close the Conversation Window:

From the Action menu, select **Close Window**. The Conversation Window closes

Goodbye (Leave an IM Conversation)

Part of the Conversation Window's functionality, the Goodbye (Leave an IM Conversation) option is accessed from the Action menu. The Goodbye/Leave Conversation is used to sever or halt all connection to a conversation.

Leaving a Conversation in this way is Permanent.

Leaving a conversation is not the same action as Closing the Window. Other users may continue the conversation well into the future, but you will not be notified of additional conversation context.

To Leave a Conversation:

From the Action menu, select **Goodbye/Leave Conversation**.

Note: Once the selection is completed, all active conversation participants will see a message notifying them that you have left the conversation.