



# Plugin User Guide

## **Instant Technologies**

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Version 5

**TACTICAL CHAT FOR DISTRIBUTED TEAMS**

Expand your IBM Instant Messaging Services - Leverage Lotus\IBM Sametime 8/9

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# Contents

- WELCOME TO INSTANT TEAM SESSIONS!.....4
- CONNECTING TO INSTANT TEAM SESSIONS SERVER.....5
- ENTERING INTO INSTANT TEAMSESSION PLACE(S).....6
- INSTANT TEAM SESSIONS WORK AREA .....7
- MANAGING ALERTS.....11
- SPECIFYING CHAT AREA PROPERTIES .....14
- SUPPORT FOR TRANSLATION SERVICE.....16
- INVITING OTHERS TO AN INSTANT TEAM SESSIONS PLACE.....18
- BRANDING INSTANT TEAM SESSIONS.....19
- PERFORMING GLOBAL SEARCH.....20
- PLACE SEARCH.....21
- TEXT COMMANDS TO TRACK PLACE LOGGER PRESENCE.....22
- SENDING US FEEDBACK AND SUGGESTIONS.....22

# Welcome to Instant Team Sessions!

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Welcome to Instant Team Sessions Plug-in for IBM Sametime Connect user guide.

Instant Team Sessions allows teams to instantly share ideas and content in a centrally managed, secure, and persistent real-time environment. Enable your team to quickly build a group community and communicate in real-time, without losing valuable information or discussions.

This User Guide is intended for typical users of Instant Team Sessions, and outlines how you can use Instant Team Sessions.

In this document we will outline and explain the various user interface (UI) elements provided as part of the Instant Team Sessions user interface. The client experience of Instant Team Sessions is provided as part of a Sametime 7, Sametime 8, or Sametime 9 extension plugin. This plugin installs seamlessly into the existing IBM Sametime client and provides a set of extensions to interact with the Instant Team Sessions server.

For example, a person using the Team Sessions plugin has the ability to:

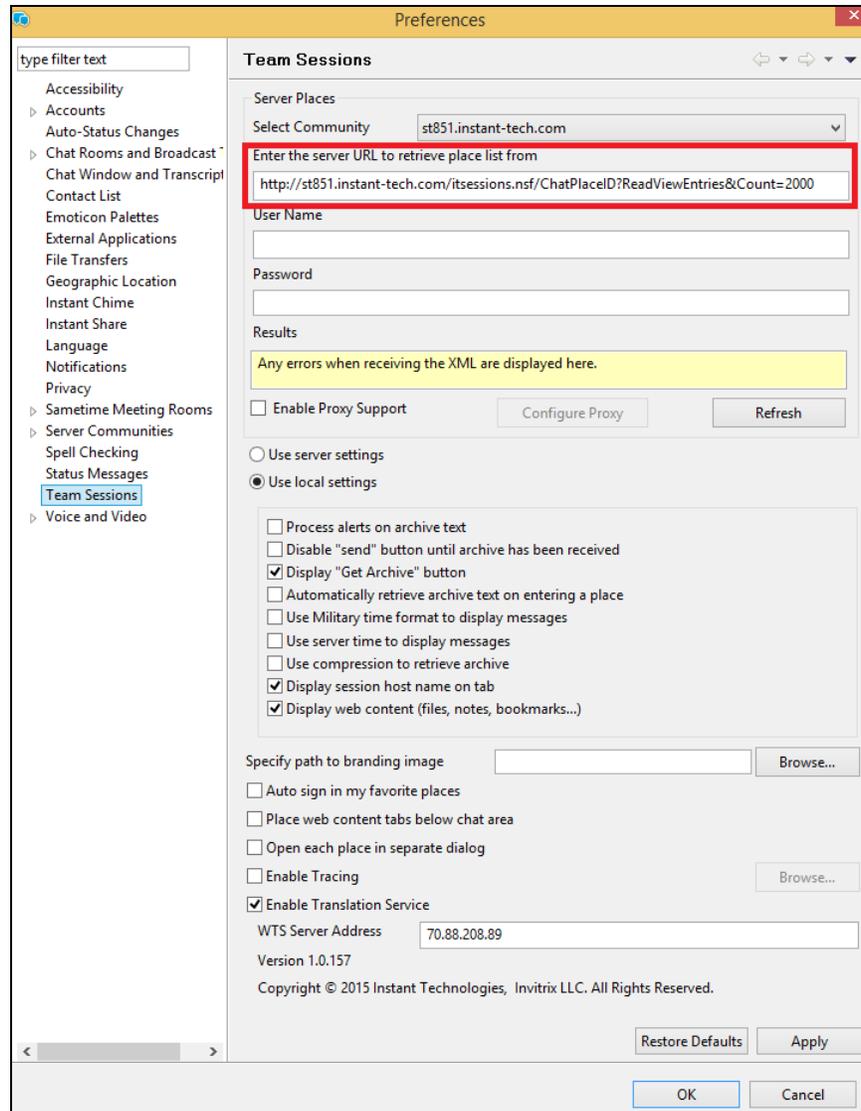
- Enter a room
- Retrieve conversation history for a room
- Enter/view chat conversations for a room
- Attach and view files within a room
- Attach comments and bookmarks to a room
- Set hotkeys
- Configure local alerts and notifications
- Assign a list of favorite rooms
- Specify text and display settings for a room

## Connecting to Instant Team Sessions Server

Within your organization, the Instant Team Sessions server application will have been installed on a server. Your Team Sessions administrator will be able to give you the URL, which will allow you to receive a list of places in which you are authorized to enter. Typically the URL is in the format:

HTTP://SametimeServer/ITSessions.nsf/ChatPlaceId?ReadViewEntries

You will need to specify this URL in the Team Sessions preference page in the Preference dialog.

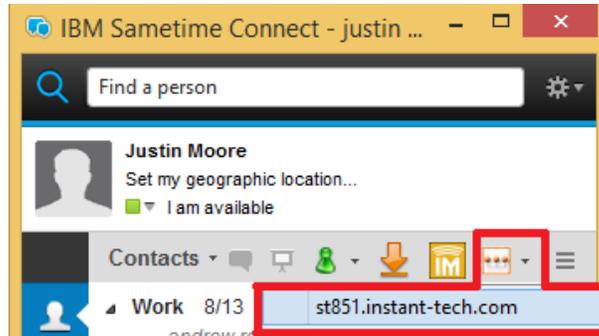


You will need to specify the URL for each Sametime community on which an Instant Team Sessions server has been installed. After entering the URL you can use the "Refresh" button to test the URL and retrieve the list of places.

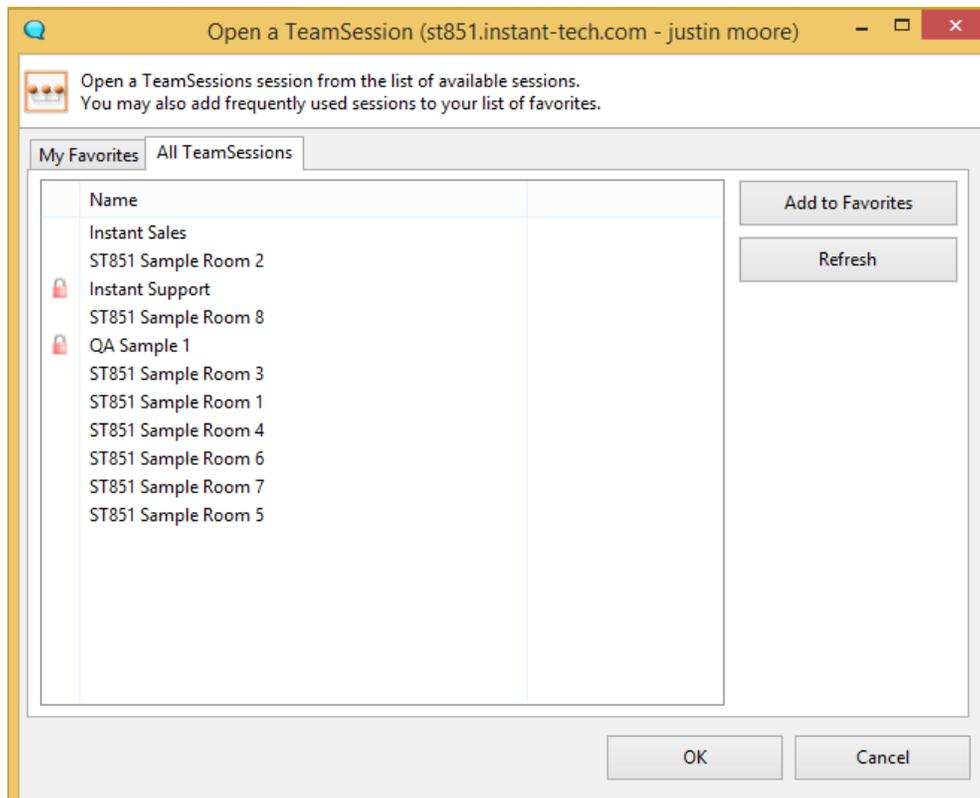
You can also specify a branding image, this image will be displayed in the Team Sessions Chat area.

## Entering into Instant Team Session place(s)

To see the list of available places, you will need to use either the menu item "Open Team Sessions..." located under the File menu or use the Instant Team Sessions icon located on the toolbar.



Both the menu option and the toolbar option will allow you to select a community in which you have successfully logged in. Next, you will see the list of places for which you are authorized to enter:

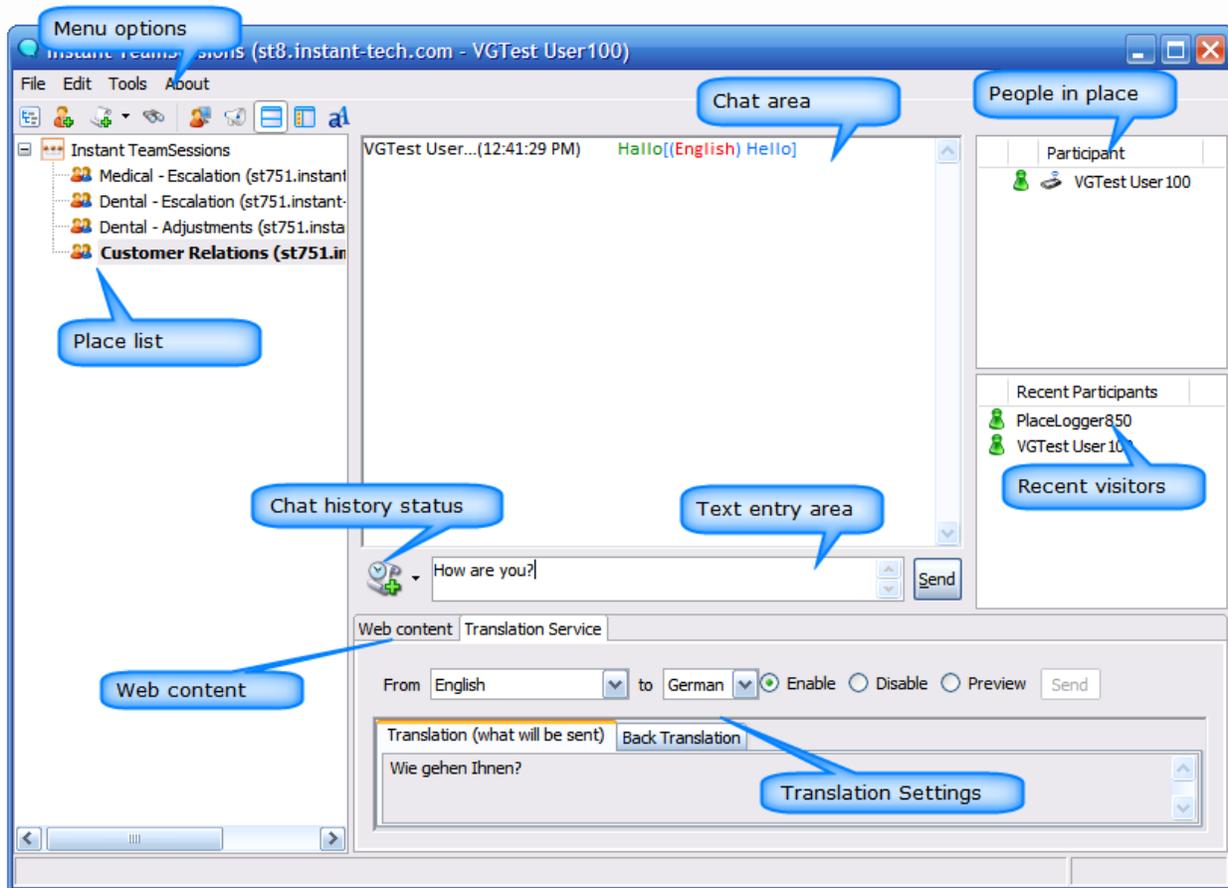


You can bookmark your favorite or most commonly used places. Bookmarked places will appear under the "My Favorites" tab. From the dialog you may select the places to enter. Multiple places can be selected using a combination of a mouse click and holding down the **Ctrl** key. When you have selected the places you wish to enter, click the "OK" command button.

# Instant Team Sessions Work Area

The Instant Team Sessions work area consists of a number of important areas. These areas are:

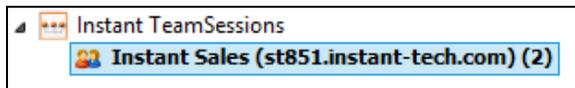
- **Place Node** - Each place/room that you enter is represented by a node in tree. Clicking on a tree node for a place will take you into the selected place.
- **People in Place list** - Displays which people are in the active place/room.
- **Recent visitors list** - Displays the last five users that were present in the room.
- **Chat History** - Displays chats that were recorded prior to the user entering the place and the chats since the user has entered.
- **Text Entry Area** - The text entry area is where the user can enter the text they want to send. The text is sent using either the enter key or the Send button.
- **Menu options** - These provide options to set **alerts**, **find text** in chat area, perform **global search**, and **invite** other people into the room.



Let's now cover each area and its functionality in more detail.

## Place List

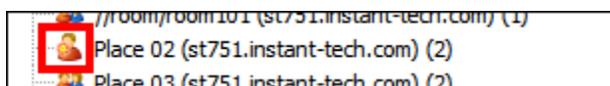
Place tree represent each place/room that the user entered. The name of the place/room is shown on the tree node. The number in parenthesis shows the total number of people in the place/room. The active tree node is displayed in bold. In the screen shot we can see that "Customer Relations" is the active place.



While a place is selected, the user is still active in the other places. If the chat is received in another place, the other place icon will change and flash to indicate that text was received, as can be seen here for the place "Place 01"



If a user has a custom alert on a place, then when an alert is received in an inactive place, the icon on the place tab will change and flash as can be seen here for the place "Place 02"



## Closing an active place

A user can right click on a specific place in a tree and select the menu option 'Leave' to exit from a place.

## People in Place list

The People in Place list displays the active users in a place/room. This list of users can vary from place to place, and is dynamic. If a user should enter the place or a user should leave a place it will be reflected in both the People in Place list and the counter in the place tab. The People in Place list also displays if a user is typing a message with a small icon, as shown here where Suzy Sparks is typing.

Participant	
	VGTest User2
	Suzy Sparks...

If the administrator has set up a moderator for a place, the moderator will also be shown in the People in Place list.

## Recent Visitors

Recent visitors list shows the last 5 people to enter the place. This list can contain users that are no longer in any place but may be logged into Sametime elsewhere. This list updates as people enter and leave the active places.

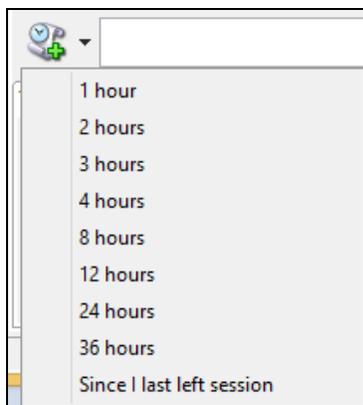
## Chat Area

The Chat History area is where prior chat history is displayed. It displays chats that were recorded prior to the user entering the place and the chats since the user has entered. The details for each chat line that are displayed are:

- Person who sent text
- Time text was sent (time zone can be either local or server as configured by the administrator)
- Text that was sent (The text also shows the date and time when people enter and leave the place)
- Chat History - This color is defined by the administrator
- Live Chat - This color is defined by the administrator
- People entering and leaving the place -This color is defined by the administrator
- Text that matches an alert - This color is defined by the user who created the alert

## Archive Options

The archive options allow the user to just retrieve the archive for the time that they want. By clicking the drop down arrow the user can select the number of archive hours to retrieve or the option to retrieve the archive since the user was last in the place. If the user has not been in the place for the number of hours specified in the general archive settings for the place, the entire archive in the memory cache of the Team Sessions server will be retrieved.



When the archive text is being retrieved, the icon changes to indicate to the user that the archive is being retrieved.

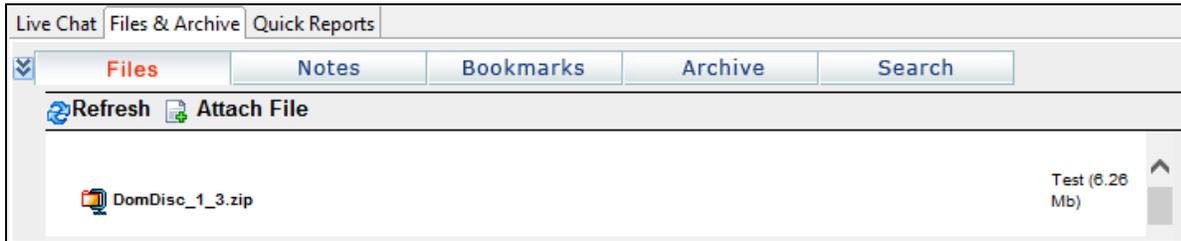


## Text Entry Area

The Text Entry Area is where a user can enter text to send to other people within the place. When a user enters text, they can send the text by either pressing the 'enter' key or selecting send with the mouse.

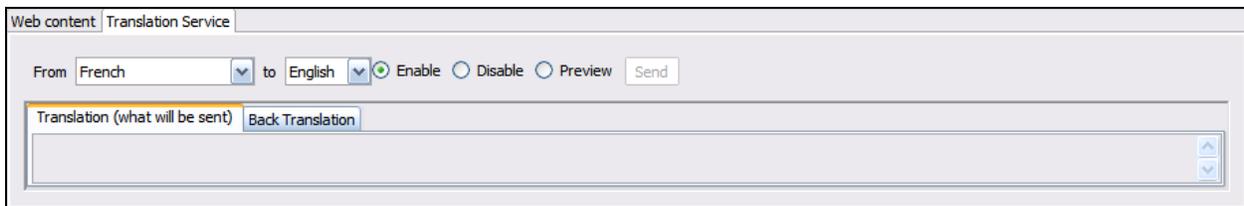
## Web Content

The Web content area allows you to share files, notes, and bookmarks with other room users.



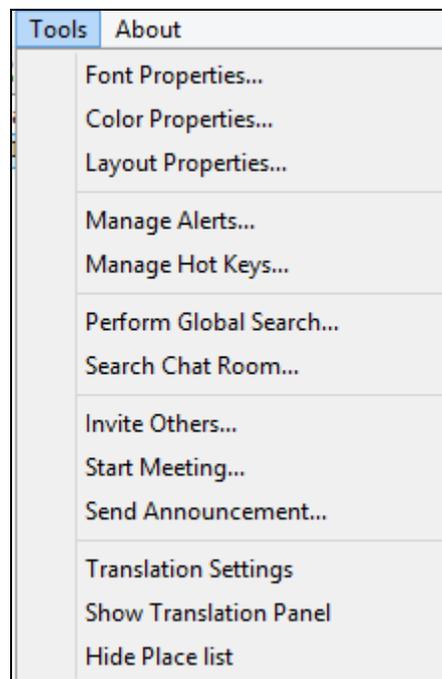
## Translation Service

This allows you to communicate with users using different languages. Places are language specific, it allows you to post messages in place specific language and view incoming messages in your native language.



## Menu Options

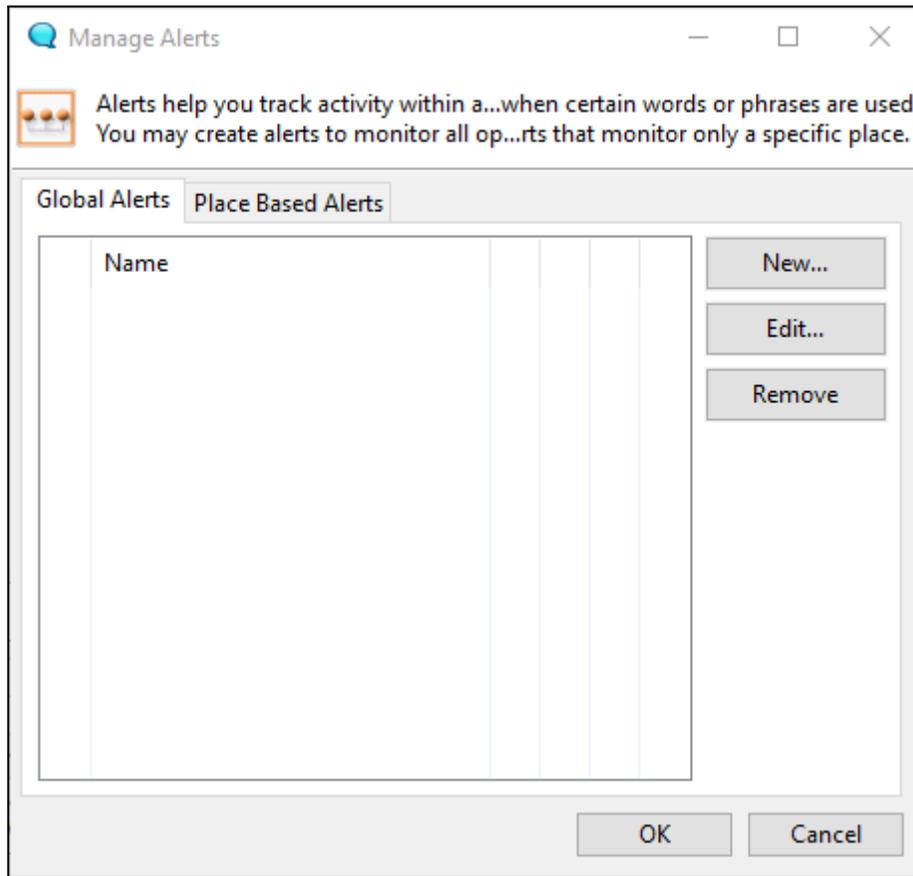
Options under the tools menu allow users to change chat area settings, manage alerts, performing global archive search, search chat room text, and invite other users to the place.



## Managing Alerts

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Alerts are personal to each user. Multiple alerts can be entered into places so that if certain criteria are met for incoming text, the user can be notified. Alert matching is performed on incoming text. A user can categorize alerts as Global and Place Based. Global alerts apply to all the places while place based alerts apply only to a specific place for which it has been created.



### Creating an Alert

To create a new alert, the user performs the following steps

1. Select the "New" button

2. User is then presented with the "Create/Modify Alert" dialog box

Create/Modify Alert

Create or modify an alert.  
Specify the alert type, the content for the alert and how the alert should be displayed.

Alert Name

Scope of the alert

Global: Operate across all open places

Specific to this place

Alert type

Raise an alert if any of the following keywords are used

Keywords or Person names

Add Text...

Remove

Alert Options

Bring the TeamSessions window to the front

Flash the tab containing the place

Display a Sametime notification popup. This will use notifications settings

Play a sound  Browse...

Display in color

Apply to complete message

OK Cancel

3. Enter a name for your Alert. This is the name used to represent the alert. Use a descriptive name for your alert.
4. Specify scope of alert. Global alert will apply to all the places while place based alert will apply only to a specific place.
5. Specify alert type. You can either monitor the text received in a place or raise an alert when a specific user or any user enters/leaves a place.
6. Enter the keywords you wish to match for your alert. Keywords are the power of alerts. Keywords are how the system knows when to notify you that one of your alerts matched. There are a number of search options that you can enter in the keywords section. See the section "Keyword Syntax" for the syntax of keywords.
7. Select the checkbox "Bring the Team Sessions window to the front" if you wish for the window to get focus when an alert is found.
8. Select the checkbox "Flash the tab containing the place" if you would like an 'inactive' tab to flash when it receives an alert.

9. Select the checkbox "Display Sametime notification popup" if you wish to receive an alert toast near the System tray when a place receives an alert.
10. Select the checkbox "Play a sound" if you want to play a sound when the alert is met. You can also specify the wave file path.
11. Select the checkbox "Display in color" to specify highlight color. This color will be used to highlight the text in the Chat History window.
12. After specifying alert properties, click on "OK" to save the alert.

### Keyword Syntax

There are a number of syntax options for searching and matching words within a Team Sessions alert. If you are familiar with DOS type searching, you will be very comfortable with Team Session alerts. The various keyword syntax are

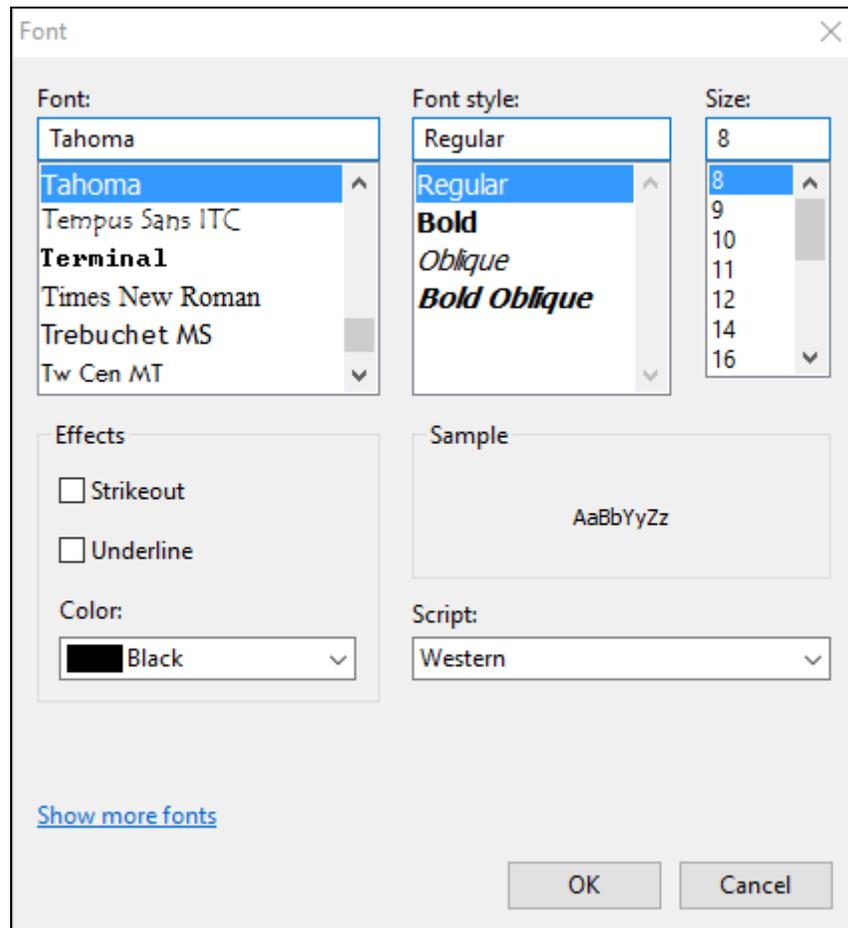
TYPE	EXAMPLE	RESULTS
<b>Word</b>	clock	Finds the complete word "clock". A word search is not case sensitive: clock, clocks cLoCks and ClOck are positive matches
<b>Partial Word</b>	*ock	Finds a word that ends with "ock": block, sock, dock and clock are positive matches
	clo*	Finds a word that begins with "clo": cloth, clot, clod and clown would all match are positive matches
	*oc*	Finds a word that contains "oc": clock, rock, Hock are positive matches
<b>Wild Cards</b>	?lock	Finds a word preceded with a wildcard character, so ?lock would match clock and block but not clocks or blocks
	cloc?	Finds a word followed by a wildcard letter, cloc? would match clock, and clocks but not aclock, bclock or dclock.
<b>Exact Match</b>	"ABC"	Finds an exact match in both case and length, "ABC" would match ABC, but not aBc, AbC, ABCDEF, BABC.

## Specifying Chat Area properties

By default, chat area properties are pushed by the Team Sessions server to the plug-in. However, users can override these settings and specify settings as per their choice. The following chat area settings can be customized:

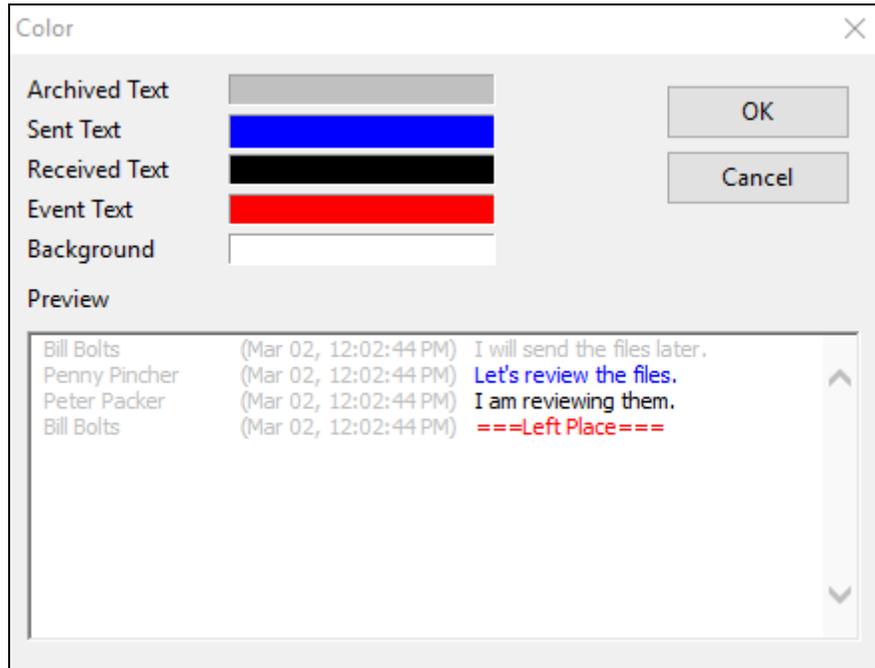
1. Font properties
2. Color properties
3. Layout properties

To modify font properties, click on the **Tools, Font properties...** menu item. This will then display the following dialog.



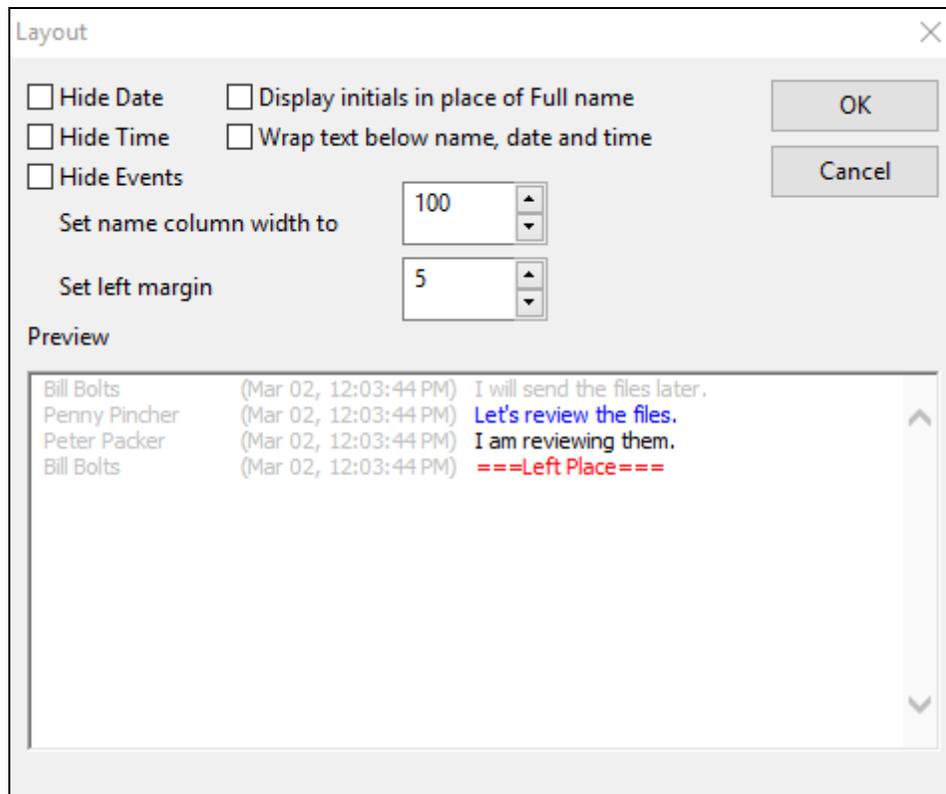
This will allow you to select Font and Font style for the chat area.

To modify color properties, click on the **Tools, Color properties...** menu item. This will then display the following dialog.



This will allow you to select colors for chat area background, event text, sent text, received text, and chat history text.

To modify layout properties, click on the **Tools, Layout properties...** menu item. This will then display the following dialog.



This will allow you to show/hide various items like message date, time etc... on the chat area.

## Support for Translation Service

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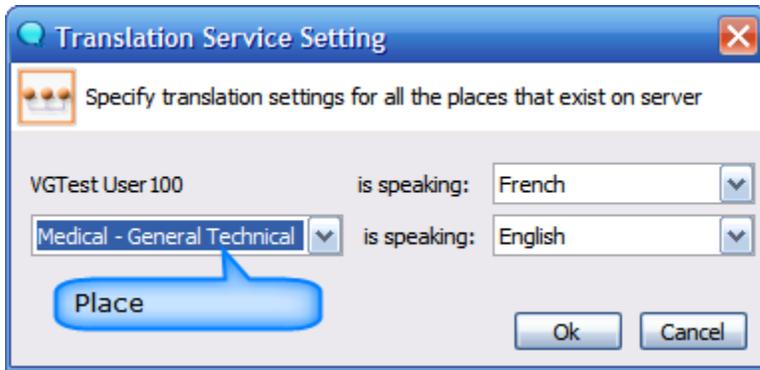
Instant Team Sessions Plug-in supports IBM WebSphere Translation server. This allows users from all across the world to communicate effectively in their native language.

Each place can be assigned a specific language. Users can then send translated text supported by that room and get messages in their native language from the place.

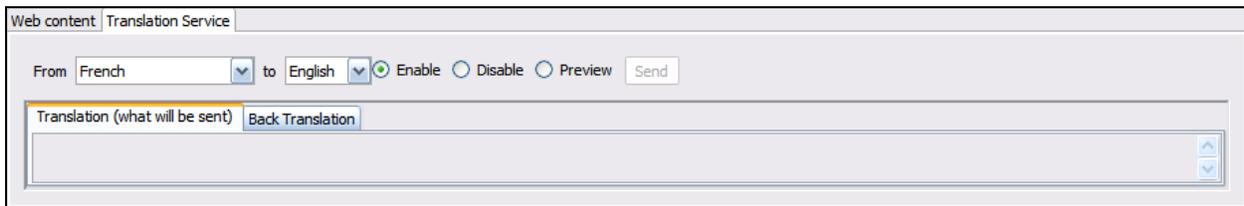
You will need to enable the support for translation service by specifying the translation server IP address on the preference page.

Next, you will need to specify your native language and assign each place a language using the Translation Service toolbar option as specified in the following screenshot:

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While a user is in place, he can also modify the translation settings for that specific place using the following panel:

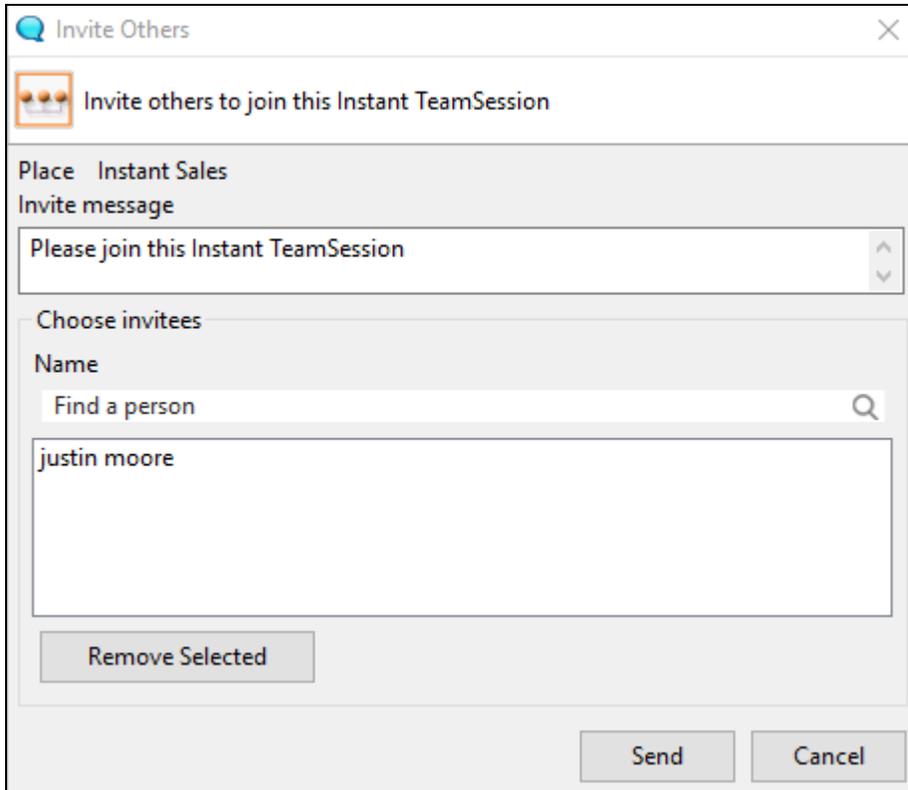


Users can also disable translation or just enable translation preview for a place as per their requirements.

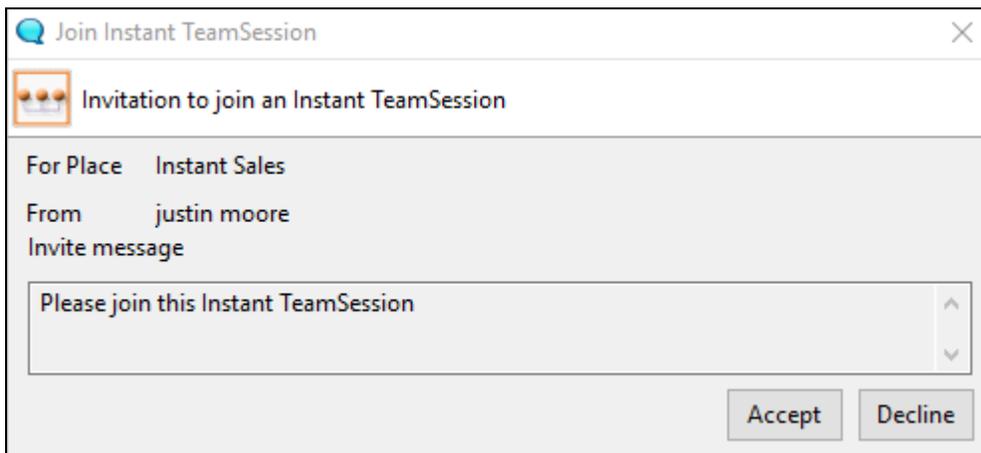
## Inviting others to an Instant Team Sessions place

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Instant Team Sessions plug-in allows you to invite other users in a specific place, even if they are not authorized for that specific place. To send an invitation, you will need to click on the **Tools, Invite Others...** menu item. This will then display the following dialog:



An invite can be sent out to multiple users at the same time. When a user receives an invitation, they get prompted with the following dialog:

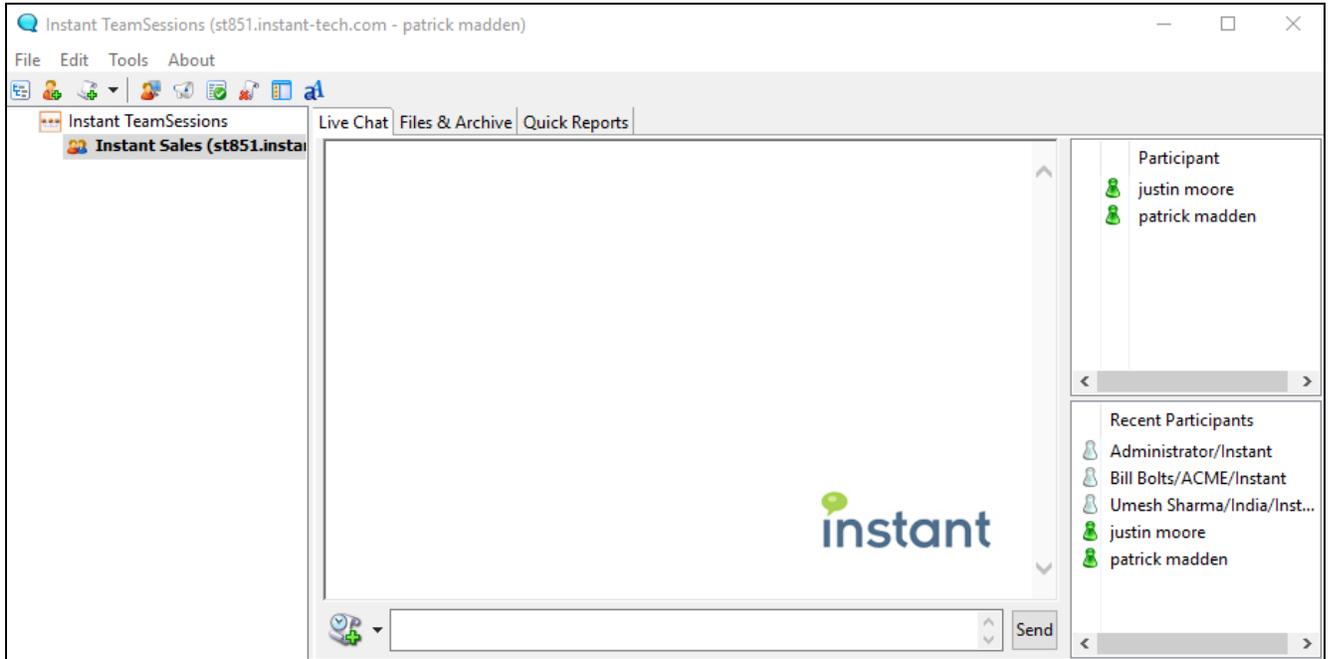


This dialog shows the place name, invite message, and sender details. Users' receiving the invitation have the option to either accept or deny the invite.

# Branding Instant Team Sessions

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Instant Team Sessions Chat Area can be branded to reflect your corporate identity. You can specify a branding image in the preference page. This image will be displayed in Team Sessions Chat area. After specifying an image path, the chat area will appear like the following screenshot:



## Performing Global Search

Global search allows you to perform an advanced search on a chat archive text for a specific place on server. To search, click on the **Tools, Perform Global Search...** menu item. This will then display the following dialog:

The screenshot shows a window titled "Instant TeamSessions Global Search". The dialog has a header with the "instant" logo and "Instant Team Sessions". Below the header is a "Search" section. It includes a "Date range" section with "From:" and "To:" input fields. A "Names to search" section contains a list of "Available names" (ABTest User1, ABTest User2, ABTest User7, Administrator/Instant, Bill Bolts/ACME/Instant, Jim Rogers, JVTest User8, mquinlan) and a "Must contain names" input field. There are navigation arrows between these two lists. Below these is an "Additional search options" section with a "Search for" input field, a "Sort results by" dropdown menu (set to "Keep current order"), a "Return a maximum of" dropdown menu (set to "All"), and two checkboxes: "Use word variants ('cat' will also find 'cats')" and "Fuzzy search". A "Search" button is located at the bottom right. The status bar at the bottom left says "Page Loaded".

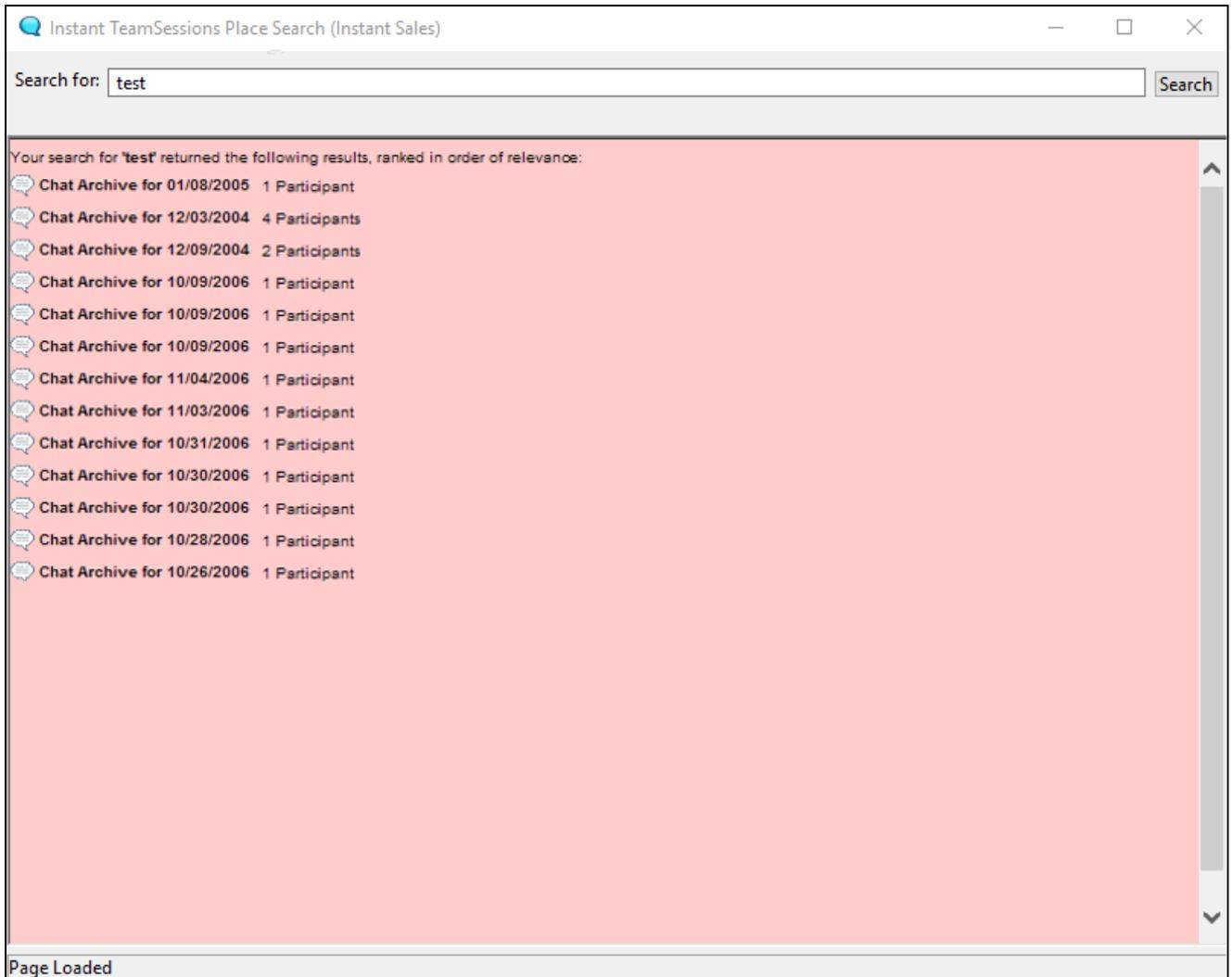
Specify values for various fields as per your requirements, and then click on the Search command button to view results. Results will appear like the following screenshot:

The screenshot shows the results page of the "Instant TeamSessions Global Search" window. It displays the search query: "Your search for: '([archiveParticipantList] contains Peyton McManus/US/Instant)'". Below the query, it states "returned the following results, kept in existing sort order". The results are listed in a table with columns for the archive name and the number of participants. The first three results are: "archive - 06/08/2005" with 1 Participant, "archive - 02/15/2005" with 2 Participants, and "archive - 02/15/2005" with 2 Participants. The status bar at the bottom left says "Page Loaded".

## Place Search

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This allows you to search chat history text for a specific place. To search, click on the **Tools, Search Chat Room...** menu item. This will then display the following dialog:



Specify the text to search for in the text field and click on the Search command button. The dialog will then display the search results.

## Text Commands to track Place Logger presence

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While in a chat room, a user can issue the following commands from the text typing area to track Place Logger presence:

**!!Help:** Use this option to view a list of supported commands

**!!ShowStatus:** Use this command to view the archiving status

**!!GetArchive:** Use this command to retrieve a chat archive

**!!ShowUsers:** Use this command to view all of the users present in this room, including place loggers

**!!ShowLoggerName:** Use this command to view the active place logger name

**!!ShowLoggersInList:** Use this command to view all the place loggers in a participant list

**!!StartCount:** Use this command to automatically post messages to the room (every second)

**!!StopCount:** Use this command to halt the automatic message delivery process

Results are displayed in the chat area that display's incoming messages from participants.

## Sending Us Feedback and Suggestions

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We value your suggestions and product feedback. As a design and development team, we recognize that most of the great ideas and suggestions come from our customers using, and extending, our products. If you have a product idea or suggestions, please take the time to compose a short email and send it to:

[support@instant-tech.com](mailto:support@instant-tech.com)

Thank you for taking the time to share your ideas and for using Instant Team Sessions Plugin.