



USER GUIDE
INSTANT MESSAGING

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Instant Messaging Basics (Beta)

The instant messaging (IM) feature lets you exchange messages in real time with your friends. When you write a message and send it, the text displays immediately in the recipient's mailbox.

You can use IM in MeritMail Web Client to:

- Create a list of contacts, also known as buddies, to communicate with in real time. (See *next page for 'Adding Buddies' information*).
- Interact with your buddies by setting up individual IM chats. (See *Starting an IM chat on page 5*).
- Save your chat transcripts (See *IM Preferences on page 6*).
- Integrate IM messages with email (See *IM Preferences on page 6*).
- Set your desired IM preferences (*IM Preferences on page 6*).
- Login to external IM Clients such as Yahoo! Messenger (*Log into Other IM clients on page 6*).

Accessing Instant Messaging

To start an instant messaging (IM) session, you click on the IM tab. From here you can start a chat, see your buddy list and change the status of your IM session.

Click on the IM tab.

Check to see if you appear online when you log in by confirming your status in the IM toolbar. If the status shows  , you are ready to begin using IM.

If it shows a different status, click on Online to open the drop down menu and change your status to online or available to chat.

You are now ready to start adding buddies.

Adding buddies

To use IM, you must have at least one buddy added to your buddy list. Buddies can be added from your Address Book or you can enter them manually. The buddy name appears on your buddy list in the Navigation pane when added.

To add a buddy:

Click on the arrow on **New** to open the drop down menu.

Select **New Buddy**. The **Create New Buddy** dialog box appears.

Enter the email address of the contact you want to add as a buddy. If you are logged into an external service (see next page for *Logging into other IM clients*), you have the option to add friends to that service too.

Enter the **Buddy Name** as you want it to appear on your list. If you do not enter a buddy name, the contact's email address appears as their name on the list.

The buddy is automatically notified and given the option to allow or deny your add request.

If you want to organize your buddies in to groups, choose a group for your new buddy. The default group is **Buddies**. To assign a new group, type in the name of the new group and click **OK**.

When you want to add a second buddy to the same group, click on the arrow beside the Buddy Groups field and choose the desired group.

If you do not want to assign a group, click **OK**. The new buddy appears under the Buddies group by default.

You can also add a new buddy by right-clicking in the white space in the navigation pane on the left and selecting New Buddy.

Alternatively, right-click on the grey bar that says Buddy List in the navigation pane, and select New Buddy.

Starting an IM chat

Once you have added buddies, you can start an IM chat with them.

To start a chat:

1. Double-click on the name of the contact you want to chat with. An IM chat window appears with the buddy's name in the header.
2. In the bottom of the chat window, type text that you want to send and hit the **Enter** key or click **Send**. The message appears in the chat window under your name.
3. When your friend sends you a reply message, you can view it in the IM chat window under their name.
4. To end a chat, press **Esc** or click on the red X to close the window.

Your chat transcript gets saved by default under the Chats folder that you can access in the navigation pane under the Mail tab. To change save settings, see Setting IM Preferences on next page.

Using Emoticons in your IM

You can also use Yahoo! emoticons in your IM chat. Click on the arrow on the yellow smiley button to open the emoticons drop down menu.

Click on the desired emoticon to insert it in the text field. Type text to accompany the emoticon or simply hit **Enter** or click **Send** to just send the emoticon. You can see it appear in the chat window.

Some other ways to start an IM chat

- Right-click a buddy's name and select **New Chat**.
- Click **New** in the IM toolbar.
 - The **Select Buddy** or **Contact** dialog box appears.
 - Select a contact from your Buddy list. Click **OK** to open the chat window.

You can also type a contact in the Search box to start a chat with someone who is not in your buddy list. Type the email address of the contact and click **OK**.

Setting IM preferences

You can set desired account preferences for accessing and using IM in MeritMail Web Client from the **Preferences > IM** tab. Be sure to click **Save** to save any changes you make to your preferences.

Login

Check the box if you want to login to IM automatically when you sign into the MeritMail Web Client. The box is checked by default to ensure automatic login to IM.

If you uncheck the box, you will have to manually sign in by changing your status from offline to online from the status drop down menu.

Notifications

You can choose options for seeing IM notifications in this section.

- **Enable instant notifications** shows brief pop up messages to notify other's of your contacts' status.
- **Display presence notifications** displays a brief pop up to notify you if a buddy is online or offline.
- **Display notification** when a buddy changes status displays a brief pop up to notify you if a buddy changes their status in MeritMail IM.

When a Message Arrives

You can choose the settings to be displayed on IM when you receive a new IM message.

- **Play a sound** plays sounds when a message arrives. You need the Quicktime or Windows Media Player plug in installed to hear sounds.
- **Highlight the IM tab** flashes the IM tab if you are working under a different tab and receive an IM message.
- **Flash the browser title** flashes the browser title if you are working in a different browser tab or browser window and receive an IM message.

Chat

Under this section, you can set preferences to customize your chat experience in MeritMail IM.

- **Save chat history** saves your chat transcripts. You can access saved chats in the Chats folder under the Mail tab
- **Report idle status** reports you as idle to your buddies if you are away from MeritMail Web Client for the amount of time specified in **Idle timeout**.
- **Idle timeout** lets you choose the amount of time to pass before changing your status. Your status changes according to your specifications under the **Set presence** option.
- **Set presence** lets you choose the status to be displayed when you do not access IM. The status changes according to the amount of time specified under **Idle timeout**.

Log into other IM clients

MeritMail IM lets you sign into external IM clients from the MeritMail Web Client interface. Currently, it supports only Yahoo! Messenger.

To log into Yahoo! Messenger:

1. Right-click Buddy List in the Navigation pane and select Log in to External Service.

Alternatively, you can also click on the red Y! icon to log into Yahoo! Messenger

2. In the dialog box that appears, enter your screen name and password for your Yahoo! account and click OK.
3. An IM chat window appears to confirm successful login.

Your contact list from Yahoo! Messenger appears in the navigation pane on the left. Status of your Yahoo! Messenger buddies and groups, if you have created any in Yahoo! Messenger, appear as they do in Messenger.

To start an IM chat with buddies from your external service, follow the steps outlined under Starting an IM Chat on the next page.

To log out of the external IM client:

1. Right-click **Buddy List** in the navigation pane and select **Log in to External IM Service**, as you did to log in.
2. In the dialog box that appears, click **Log Out**. An IM chat window appears to confirm that you have logged out.

Your buddy list from the external IM client disappears from the navigation pane once you log out.

Alternatively, you can also click on the red Y! icon on the bottom right corner to open the same dialog box to log out.

IM Chat options to customize your chat experience

You have a number of options to customize and improve your chat experience in MeritMail Web Client.

Changing text format

To customize your text options:

1. Click **Change Format**. A formatting toolbar appears in the chat window.
2. Choose the font, font size, text appearance (bold, italic or underlined), and text color as desired.
3. Click **Change Format** once more to close the formatting toolbar. You can leave it open if desired. The text now appears customized to your requirements.

Emailing chat transcripts

You can email a chat transcript to your contacts through the IM window. To email a chat:

1. Click **Send by email**. A new compose email window opens with the chat transcript in the body of the email.
2. Complete the necessary fields. You can also add text in the body of the email to reference a point.
3. Click **Send** to email the chat transcript to the contact(s).

Alternatively, you can also forward a saved chat from the Chats folder in the navigation pane under the Mail tab. Select the chat transcript that you want to email and click **Forward** to send the email.

Marking a chat as important

You can mark a chat as important by clicking the star in the IM window so that it turns green. Click on the star again to remove the marking.

Creating a sticky window

A sticky IM window enables you to see the chat window even when you are out of the IM tab.

- To create a sticky IM window, in the IM window, click on the push pin icon on the top right so that it turns colored and horizontal.

You can now access other tabs and still see the IM chat window on top of the MeritMail Web Client interface.

- To turn off the sticky window, click on the push pin icon again regardless of the tab you are under, and the IM window goes back under the IM tab.

Changing status and availability

To use IM, your status has to be **Online** or **Available to Chat** so that your buddies can see you online and start a chat.

To set your status in MeritMail IM:

1. Click the **Online** drop down box in the toolbar to open the status drop down menu. You can set the any of the following statuses for yourself:

- Offline
- Online
- Available for chat
- Do not disturb
- Away
- Extended away
- Do not disturb
- Will be right back
- New status message

2. Select the status that you want to show your IM buddies.

Alternatively, you can also click on the status display beside your name in the navigation pane on the left and choose a status from the drop down menu.

Creating a new status message

MeritMail IM gives you the choice of creating your own customized status messages.

To create a new status message:

1. Click the **Online** drop down menu or the status display beside your name in the navigation pane on the left.
2. Select **New Status Message**. The New Status Message dialog box appears.
3. Enter the message that you want to set as your new status. An example is “Will be right back”. Your status appears customized to your changes.
4. To change your status to the default options available, click the Online drop down menu again and select your desired status.

Status messages you create are stored for future use and cannot be deleted. MeritMail Web Client saves the five most recent status messages that you create for IM.

Setting up desktop alerts and reminders

You can create desktop alerts for new email notification, appointment reminders, and instant message notification. To receive alerts, your mailbox must be opened.

- **Email message alerts.** You set your preferences in the Preferences>Mail tab. Following are the alert options:

- **Play a sound.** You are notified by a beep when a new email arrives in the Inbox. If you have your volume set to mute, you will not here a sound.

- **Flash the Mail tab.** The email tab is highlighted when new email arrives in the Inbox if you are not working in the Mail tab.



- **Flash the browser title.** When new email arrives in the Inbox, the browser flashes until you open the Mail tab.

- **Appointment Reminder alerts.** You set your preferences in the Preferences>Calendar tab. Before you can set an alert, set the time to be reminded of your meeting. This can be up to 60 minutes before the meeting. A reminder dialog appears at the designated time before the meeting. If you set reminders to **Never**, you are not reminded of the meeting even if you have the reminder options enabled.

The MeritMail Web Client reminder does not pop up on the top of the page if you are not in MeritMail Web Client Calendar, enabling one of the following options helps to alert you of the pop-up:

- **Play a sound.** You are notified by a beep when an appointment reminder pops up. If you have your volume set to mute, you will not here a sound.

- **Flash the browser title.** When an appointment reminder pops up, the browser flashes until you close the pop-up

- **IM alerts.** You set your preferences in the Preferences>IM tab. You must enable instant notification to get an alert. Following are the alert options:

- **Play a sound.** You are notified by a beep when an IM is received. If you have your volume set to mute, you will not here a sound.

- **Flash the IM tab.** The IM tab is highlighted when new IM is received to the IM tab.

- **Flash the browser title.** When an IM is received, the browser flashes until you open the IM tab.