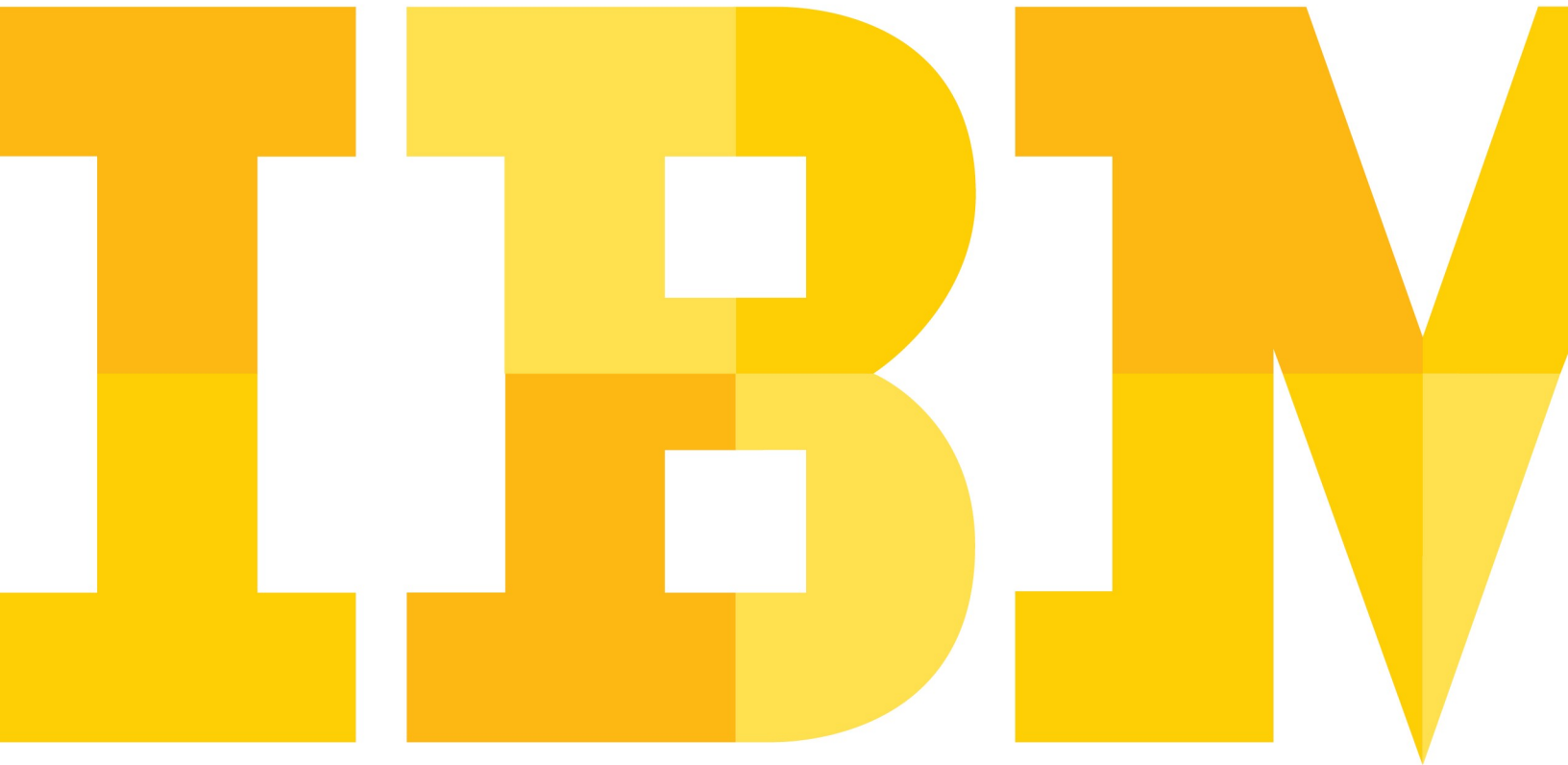


# Discovering the value of IBM Lotus Sametime 8.5

*Lab Exercise 1: Exploring the Sametime Connect Client*



# An IBM Proof of Technology

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# Table of Contents

<b>OVERVIEW.....</b>	<b>4</b>
<b>LAB 1 DISCOVERING INSTANT MESSAGING THROUGH SAMETIME CONNECT CLIENT.....</b>	<b>6</b>
1.1 CONFIGURING THE LOTUS SAMETIME CLIENT.....	6
1.2 GETTING FAMILIAR WITH THE SAMETIME CONNECT CLIENT.....	10
1.3 STARTING A CHAT SESSION.....	21
1.4 WORKING WITH REAL-TIME AUDIO AND VIDEO.....	30
1.5 LAB 1 REVIEW.....	34

## Overview

Enterprise instant messaging (IM) is often the first point of contact when reaching out to colleagues. Quick text chats can answer simple questions outright. People don't have to wait for the response to an email or a phone call, so they can be more productive. Text chats and built-in voice and video can eliminate calls and reduce your telephony expenses. IBM Lotus® Sametime® software delivers enterprise instant messaging with the security features, reliability and scalability that enterprises require.

IBM Lotus Sametime 8.5 software gives you award-winning and market-leading instant messaging capabilities that help you collaborate and keep pace with your real-time work environment. The software includes several Instant Messaging clients, all to help your employees to connect and collaborate from their choice of software.

Clients include:

- **Lotus Sametime Connect Client** - a stand-alone Eclipse application;
- **Lotus Notes embedded Sametime client** - an Instant Messaging client embedded in the sidebar of Lotus Notes Software;
- **Lotus Sametime Web Client** - an Instant Messaging client available on the web;
- **Lotus Sametime Mobile Clients** - support for the Lotus Sametime client on your mobile phone, whether it's a BlackBerry phone, Windows Mobile, iPhone, Symbian .etc;
- **Integrated clients** - integrated into different applications, such as Microsoft® Outlook®, the Microsoft Office tools, and other business applications.

This lab will cover the *Lotus Sametime Connect 8.5 Client* .




*The Lotus Sametime Connect client is a stand-alone Eclipse application. It contains a presence list or a contact list that provides an entry point to all collaborative activities in the Lotus Sametime application.*

By the end of this lab you should be able to:

- Configure the Lotus Sametime Connect Client
- Use the collaboration features available in the Lotus Sametime Connect Client
- Recognize the time savings that can be achieved with contextual collaboration.

## Icons

The following symbols appear in this document at places where additional guidance is available.

Icon	Purpose	Explanation
	Important!	This symbol calls attention to a particular step or command. For example, it might alert you to type a command carefully because it is case sensitive.
	Information	This symbol indicates information that might not be necessary to complete a step, but is helpful or good to know.
	Trouble-shooting	This symbol indicates that you can fix a specific problem by completing the associated troubleshooting information.

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## Lab 1 Discovering Instant Messaging through Sametime Connect Client.

In this section of the hands-on lab exercises, you will explore using the **Sametime Connect Client**.

In the following lab you will:

- Configure the Lotus Sametime Connect Client
- Get familiar with the Sametime Connect Client
- Start a chat session
- Start a voice chat
- Start a video chat

### 1.1 Configuring the Lotus Sametime Client

The Sametime Connect client is the entry point into the Sametime Community. Instant Messaging, Awareness, Web Conferencing, Telephony, Microsoft Office integration, and external chat communities can all be accessed through the Sametime Connect client. As using the Expeditor platform based on Eclipse, it is also highly manageable through update sites and policy controls. Let's go through some of the setup manually in order to see what can be configured.

- \_\_\_1. Start the client. On your desktop, double click on the following icon (this icon should be available after the Sametime Connect Client has been installed on your machine)



- \_\_\_2. The following log-in box will appear, enter the host name of your Sametime Community Server. In this case, enter stcomm.demos.ibm.com (as shown below)
- \_\_\_3. Enter the assigned user name provided to you and the following password “**lotus4me**”
- \_\_\_4. (Optional) Click *Remember password* to have your password saved. You may also then click '*Automatically log in*', which enables you to log in automatically once Connect is launched.

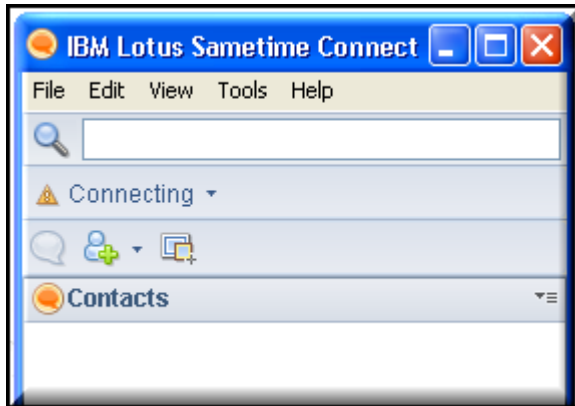


The screenshot shows a Windows-style dialog box titled "Log In to Sametime". The dialog has a blue header bar with a close button (X) in the top right corner. Below the header, there is a yellow and white decorative graphic. The text "Lotus. Sametime. 8.5" is displayed in a bold, brown font. The main area contains several input fields and options:

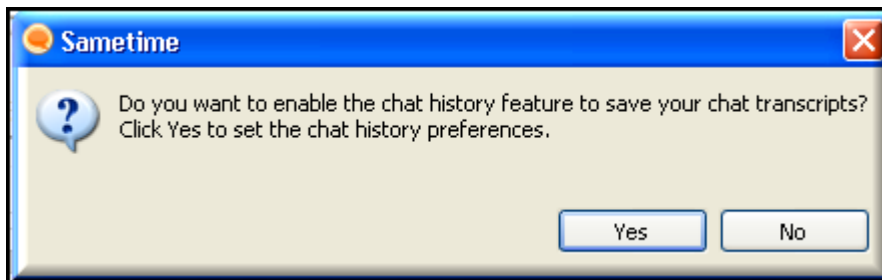
- Host server: A text box containing "stcomm.demos.ibm.com".
- User name: A text box containing "Assigned Name".
- Password: A text box containing "\*\*\*\*\*".
- Remember password: A checked checkbox.
- Automatically log in: An unchecked checkbox.
- Work online: A selected radio button.
- Work offline: An unselected radio button.
- Log in status: A dropdown menu showing "Available".
- Status message: A dropdown menu showing "I am available".

At the bottom of the dialog, there are three buttons: "Log In", "Connectivity...", and "Cancel".

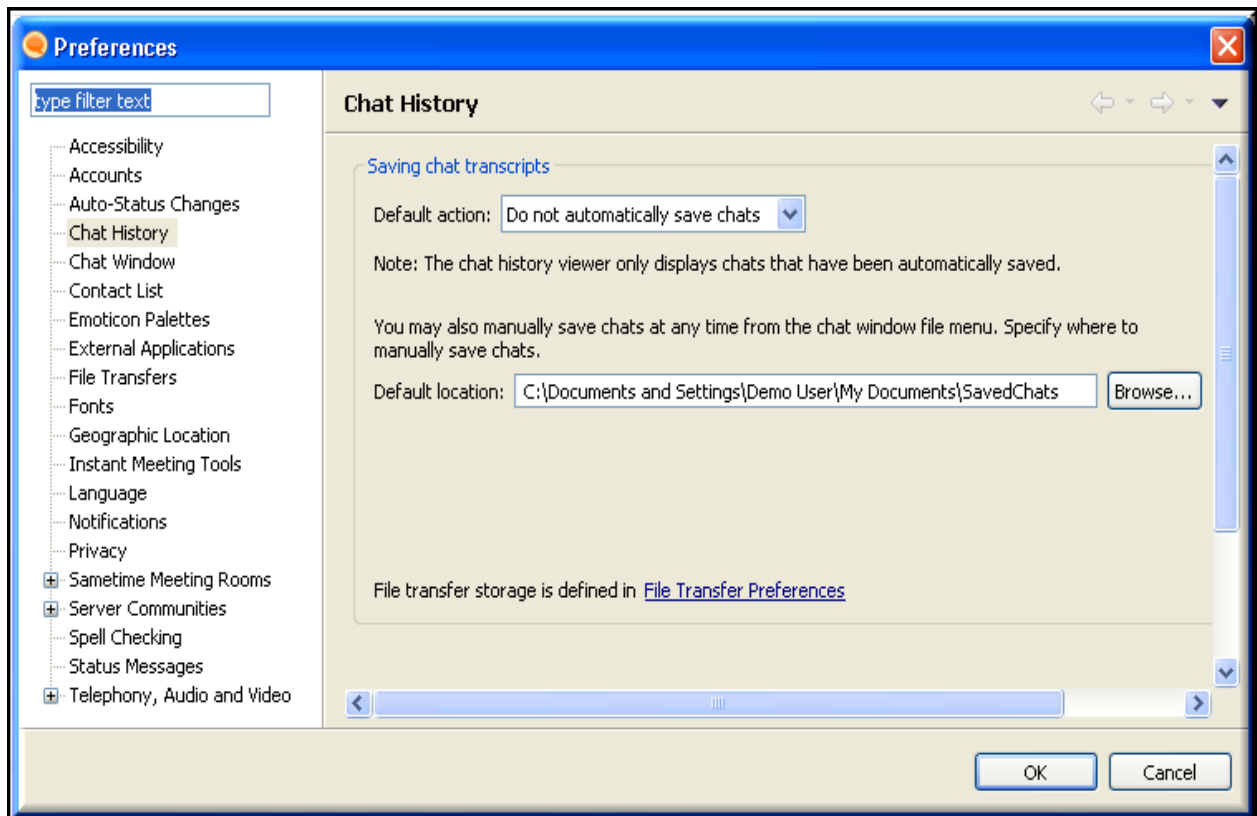
- \_\_5. Click the **Log In** button. Your Sametime Connect Client should show the following triangular icon as it is connecting.



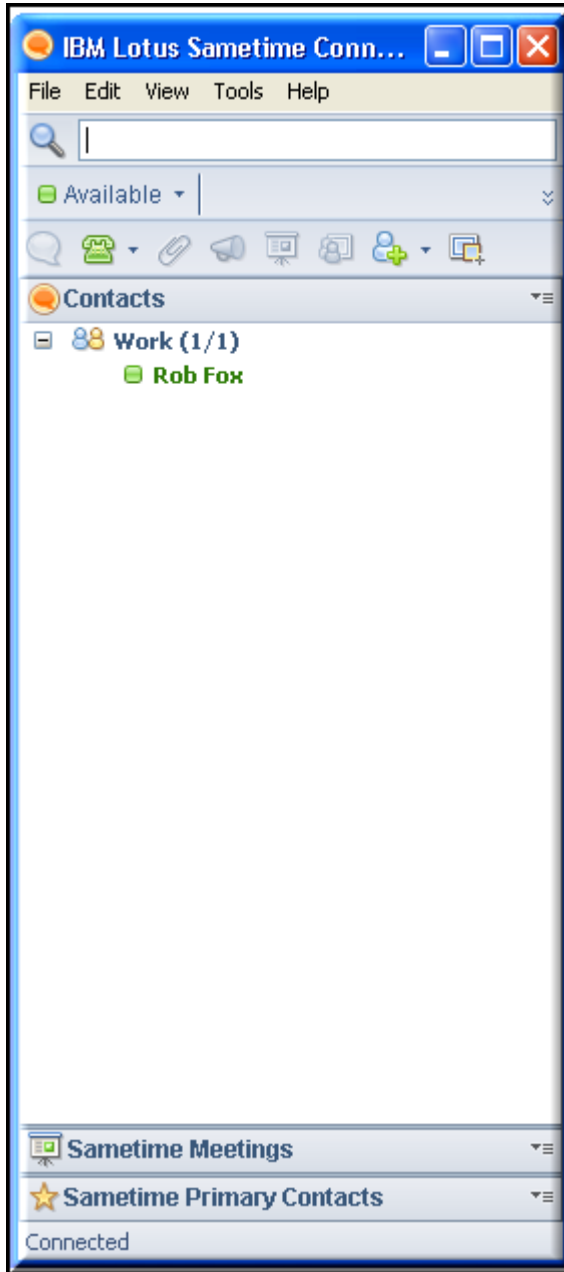
- \_\_6. Once you are connected, the following message box will appear asking you to save your chat transcripts. Click on **Yes**. Transcripts of your chats are useful references.



- \_\_\_7. The following pop-up box will appear. In the Default action combo box, select: *Automatically Save Chats*. It defaults to *Do not automatically save chats*.
- \_\_\_8. The panel will change to show the chat settings. Here you can select the path you want to save your chat transcripts, and the number of days you want to keep chat history. Also, you may select to display saved transcripts between two users in the chat display, and a background highlighting for the displayed saved transcripts. For this lab we shall leave it at the defaults and click **OK**.



- \_\_9. You have now successfully connected the Sametime Connect client to your Sametime Community and are ready to go to work.



## 1.2 Getting Familiar with the Sametime Connect Client

IBM Lotus Sametime Connect Client 8.5 is a stand-alone Eclipse-based client. The picture below shows some of the main basic features. In this lab we will cover the basic features of the Lotus Sametime Connect Client. We will start the lab by creating groups, then populating the contact list.

Take a quick look at the following graphic. This shows the major features of the Connect client and their purpose. Notice how much information is available visually. The business card shows a person's awareness state, their location, their online status, and how they can be reached all in one little window.

Knowing about a person before you contact them can help save time and effort in your daily work.

The screenshot shows the IBM Lotus Sametime Connect application window. The interface includes a menu bar (File, Edit, View, Tools, Help), a search bar, and a main contact list. A tooltip for 'Kelly Hardart' is displayed over her name in the list. Several yellow callout boxes with arrows point to specific UI elements, providing instructions on how to use them.

**Community Status**  
Your availability status shows here, one icon for each of your server communities. Click here to change your status. Other people see your status on their contact lists.

**Search**  
Type a name or telephone number here to quickly find someone to chat with or call.

**Geographic Location**  
Your geographic location shows others where you are. Click to change your location and related information.

**Icons**  
The icons in the action bar let you perform tasks. If any icons are grayed out, these tasks cannot be carried out with the selected contact at this time.

**Availability Status**  
An availability status shows for each online contact on your contact list.

**Options Menu**  
Right-click on a contact's name to display a menu of options.

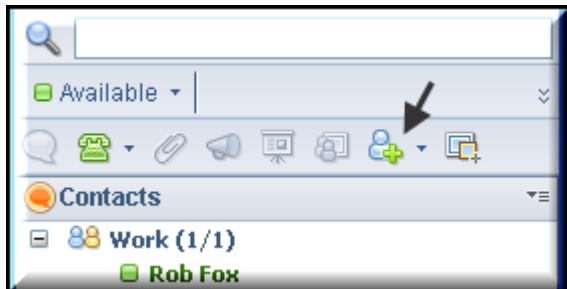
**Plug-ins**  
Installed plug-ins show here. You might have one or more plug-ins.

**Business card**  
Hover your mouse over a name to show the business card for that contact. Move your mouse away from the business card to close it or drag it elsewhere on the screen to keep it open.

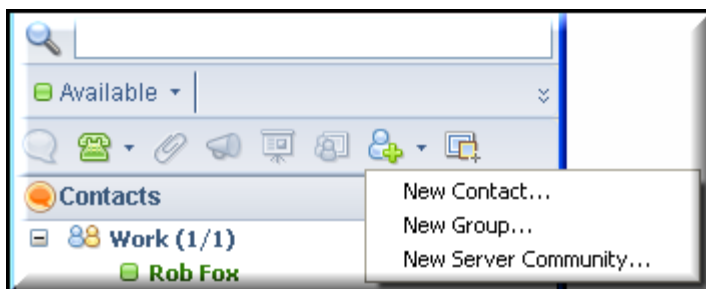
\_\_1. Let's add some people to your contact list.

\_\_a. Open the Sametime Connect Client.

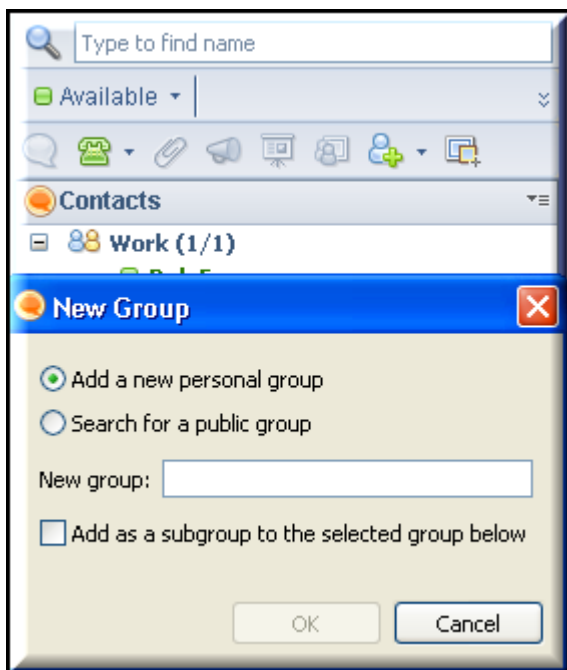
\_\_b. In the tool bar, click on the **Add new person/group** icon as shown



\_\_c. Select **New Group...**

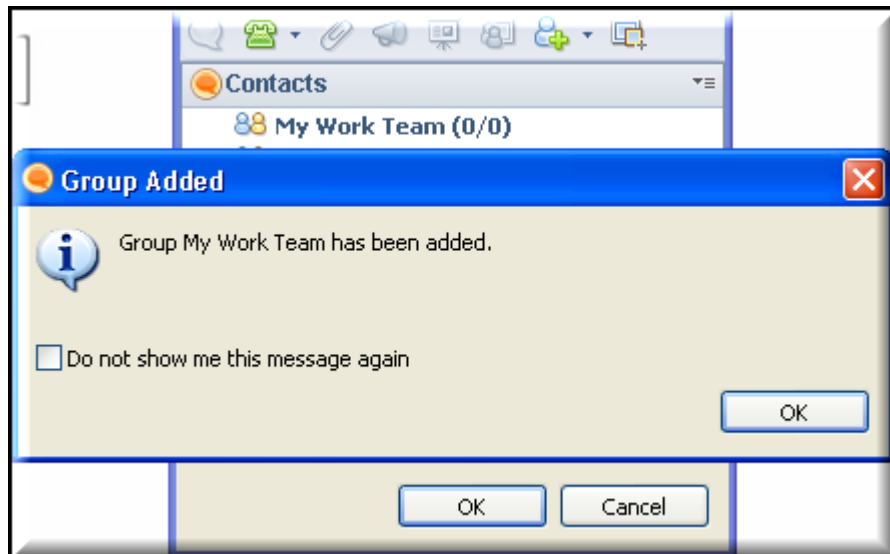


\_\_d. The following pop-up box appears. Select **Add new personal group**.



\_\_e. Enter the name for the group you want to add. For example, enter **My Work Team** to add a new personal group. This will allow the user to maintain a custom group with a custom list of users. Click **OK**

- \_\_f. The following message box appears, notifying you of the success of the operation. Click **OK**



#### Working with Groups



You can also add public groups supplied in your LDAP directory. For example, if in your directory there is a group called Sales, you can add this group to your contact list, and all contacts members in this public group will also be added to this group on your Sametime contact list.

Additionally you may add subgroups to groups, by selecting a group on your contact list then clicking the add group icon -> Check Add as a subgroup to the selected group below

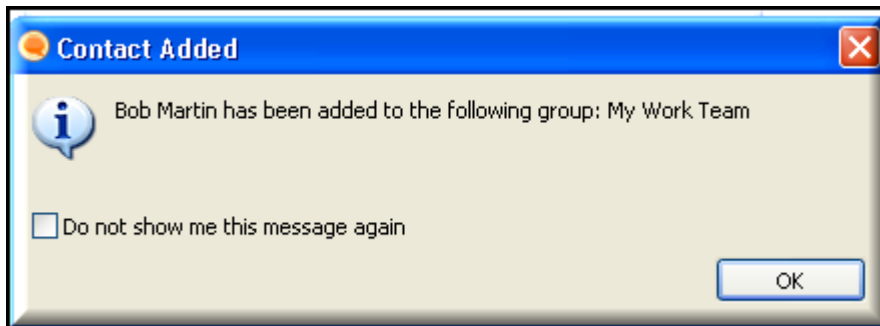
- \_\_2. Now that we have a personal group, we need to add some people to it. This can be performed in several different ways; it depends on your personal work style. You can use the menu options or you can use the Quickfind box to search for a user. We are going to use the toolbox item we have used in the previous steps. Now click on the **Add contact/group icon** to add a new contact. The following pop-up will appear



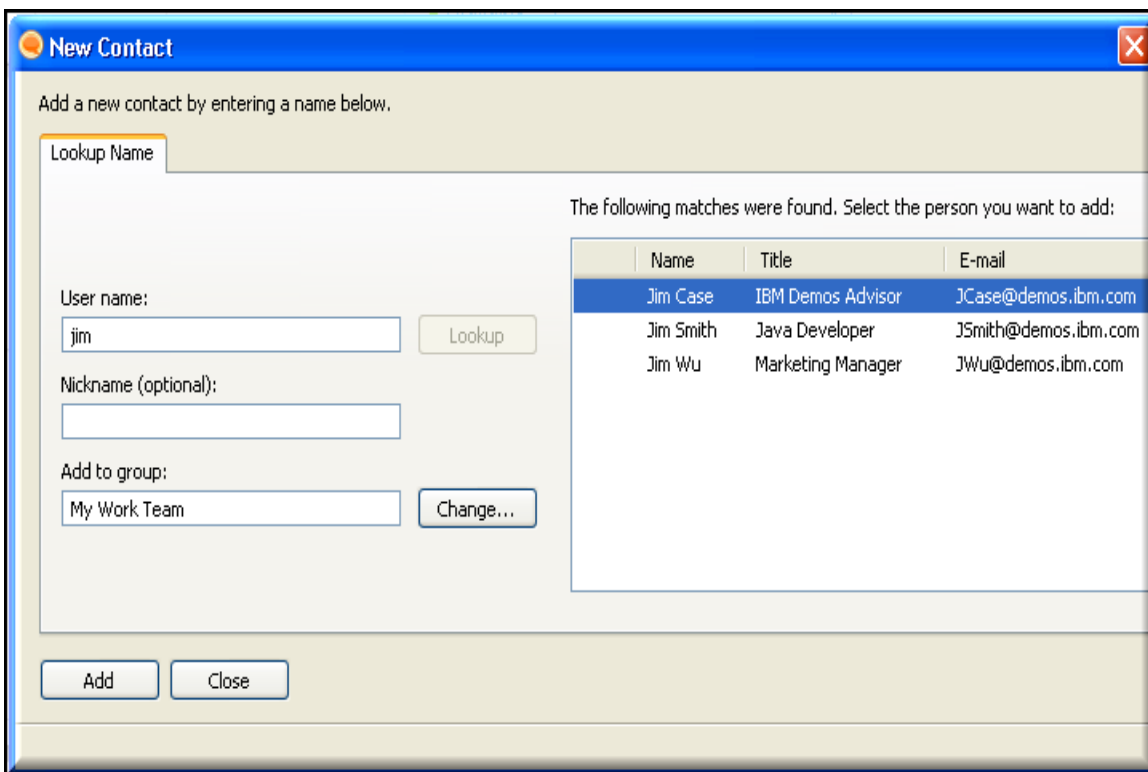
- \_\_\_a. Enter the user name to add to your contact list. For this example, you work with **Bob Martin** and want to have him in your personal group. Enter **Bob Martin** in the **User name:** field and click on the **Lookup** button.
- \_\_\_b. The search will return with all the results for Bob Martin, and you should see the business card of the user that was found. Notice the amount of information about Bob that shows up in the business card. We now know his phone number, whether or not he is online, and also his job title. This will help in determining if we have found the right Bob Martin.

- \_\_\_c. You can optionally insert a nickname for the user to be displayed on your contact list instead of his user name. Nicknames can also be leveraged for extra information at a glance. Perhaps we know Bob's personal cell phone number. We could add "Bob Martin – 888- 555-1212" as his nickname and that will show up in the contact list for Bob's name.
- \_\_\_d. If "My Work Team" is not in the '**Add to group:**' textbox as shown above, then select the **Change** button to change the group of the person to **My Work Team** and click **Add**.


- \_\_e. Click **OK** on the success message. You should now have Bob Martin on your contact list.



- \_\_f. Start adding additional users to your contact list and groups. Add more users to your list so that you will be able to start a collaboration session. Ask the persons next to you what their lab assigned name is and add that to your **My Work Team** group. If you search for a partial name and several results come up, you will be able to see the status of the user (whether online or not) and select the user to add.

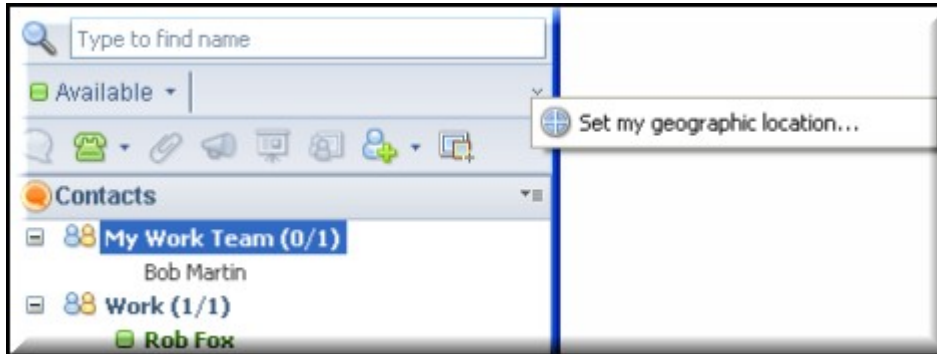


**Adding Contacts**



By hovering over the name in the search results, you may see the business card of the user. Also from the add a contact pop-up box, you can create new groups and subgroups.

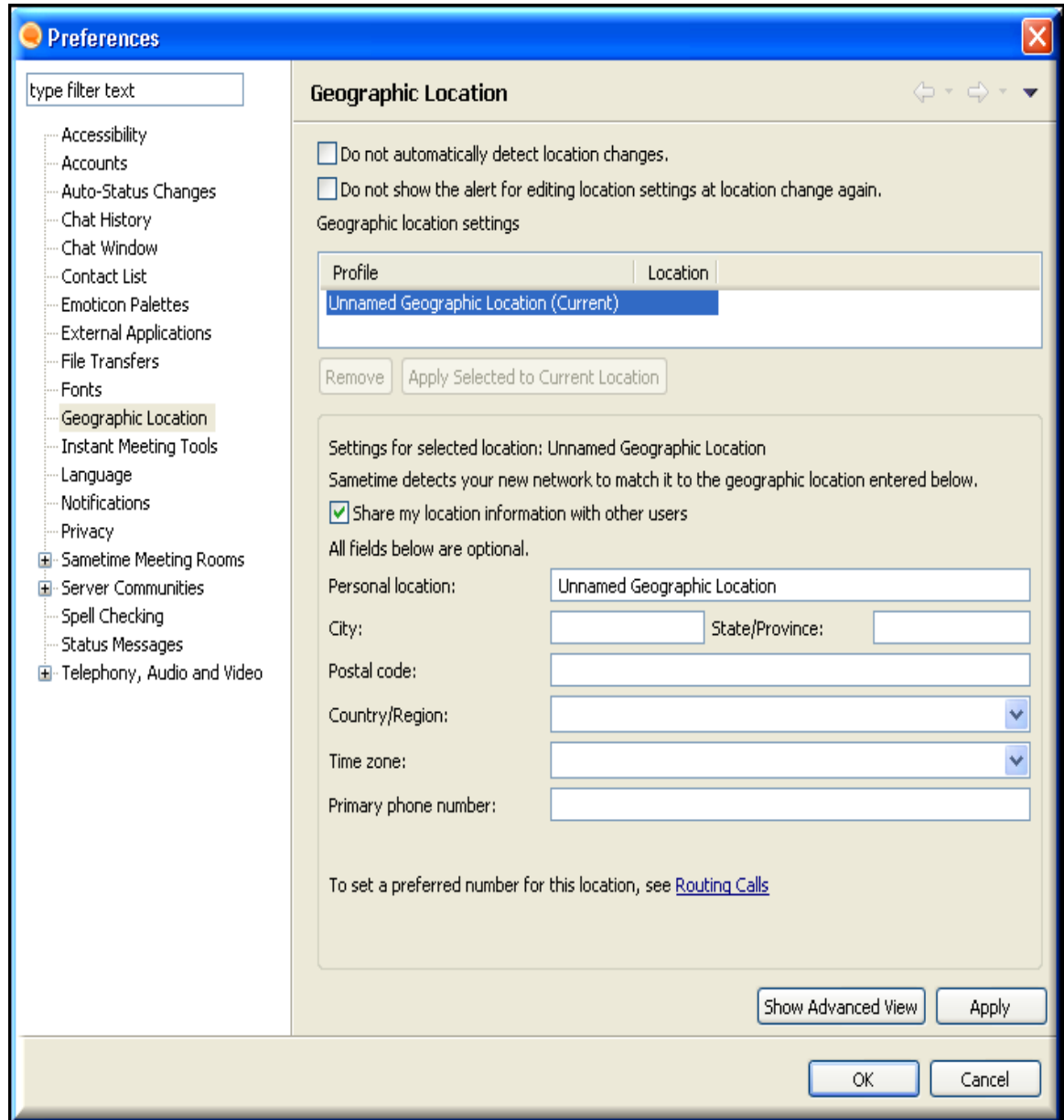
- \_\_3. One other useful feature on your Connect client is the geographic location. Click on the **Set my geographic location...** item located just below the **Type to find name** box.



#### Troubleshooting

If the location icon is not showing then you may need to resize your client. You can either click on the down arrows in the section next to your **Status** as shown in the following graphic and select **Set my geographic location...** or you can expand the size of your Sametime connect client.

\_\_a. The following screenshot shows the default profile and location.



\_\_b. The **Geographic Location** is pretty useful if you move from location to location with your Connect client. This feature lets people know where you are physically located and how they can contact you when you are online. This edits the business card settings, so when people hover their mouse over your name in the contact list, they will see your new settings and location. You can also specify several different locations, and Sametime will detect where you are each time you connect. It examines the network you are connected to and discovers the MAC address of the nearest router. This way if you return to a location where you have previously filled out *Personal Location* information, it will repopulate itself automatically.

\_\_4. Let's set this up for this location. Select **Share my location information with other users**

- \_\_a. For the **personal location** field, enter a description of where you are located, for example, "IBM Demo Location".
- \_\_b. (Optional) Complete the remaining fields, as appropriate.

Settings for selected location: Unnamed Geographic Location  
 Sametime detects your new network to match it to the geographic location entered below.

Share my location information with other users

All fields below are optional.

Personal location:

City:  State/Province:

Postal code:

Country/Region:  ▼

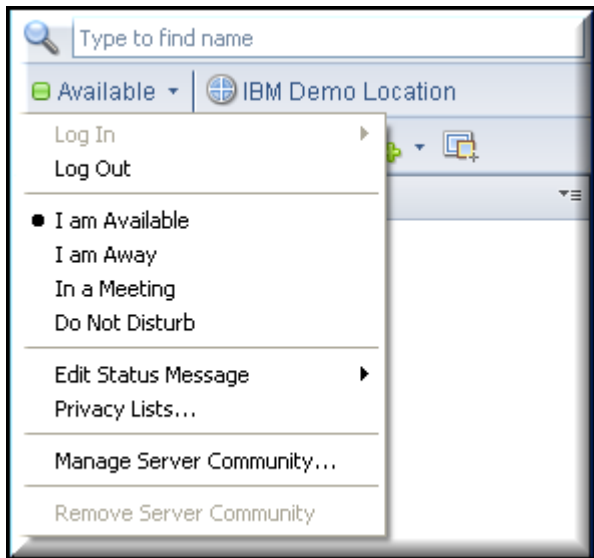
Time zone:  ▼

Primary phone number:

To set a preferred number for this location, see [Routing Calls](#)

- \_\_c. Select **Do not show the alert for editing location settings at location change again** if you do not want a message asking to change your location setting whenever you are in a new location to display
- \_\_d. Click **Apply**, then click **OK**.
- \_\_e. To re-edit your geographic location settings, click the location icon at the top of your contact list, then update the information you want to change.
- \_\_f. Now return to the Connect client list and hover over your own name. Notice the changes to the business card since adding the location information.
- \_\_g. (Optional) Click on "Show Advanced View" at the bottom of the location pane to see the MAC address of your current router.

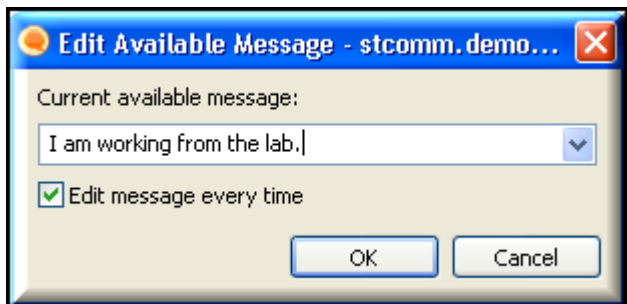
- \_\_5. Now people know *where* we are, but we need to also let them know *what we are doing*. The online status of a person lets you know if they are available, away, in a meeting or if they are wanting to not be disturbed. To change your online status, go to the Sametime toolbar and click on **Available**.



- \_\_a. As shown in the screenshot, you now can choose the appropriate status to match your current working state. If you refer back to where we logged onto the Connect client, it had an option to allow you to login to the community with a pre-chosen state.
- \_\_b. Click on **Edit Status Message** and select the status you want to update. For example, select the **Available message**. A pop-up appears.



- \_\_c. Enter your new status message as shown.

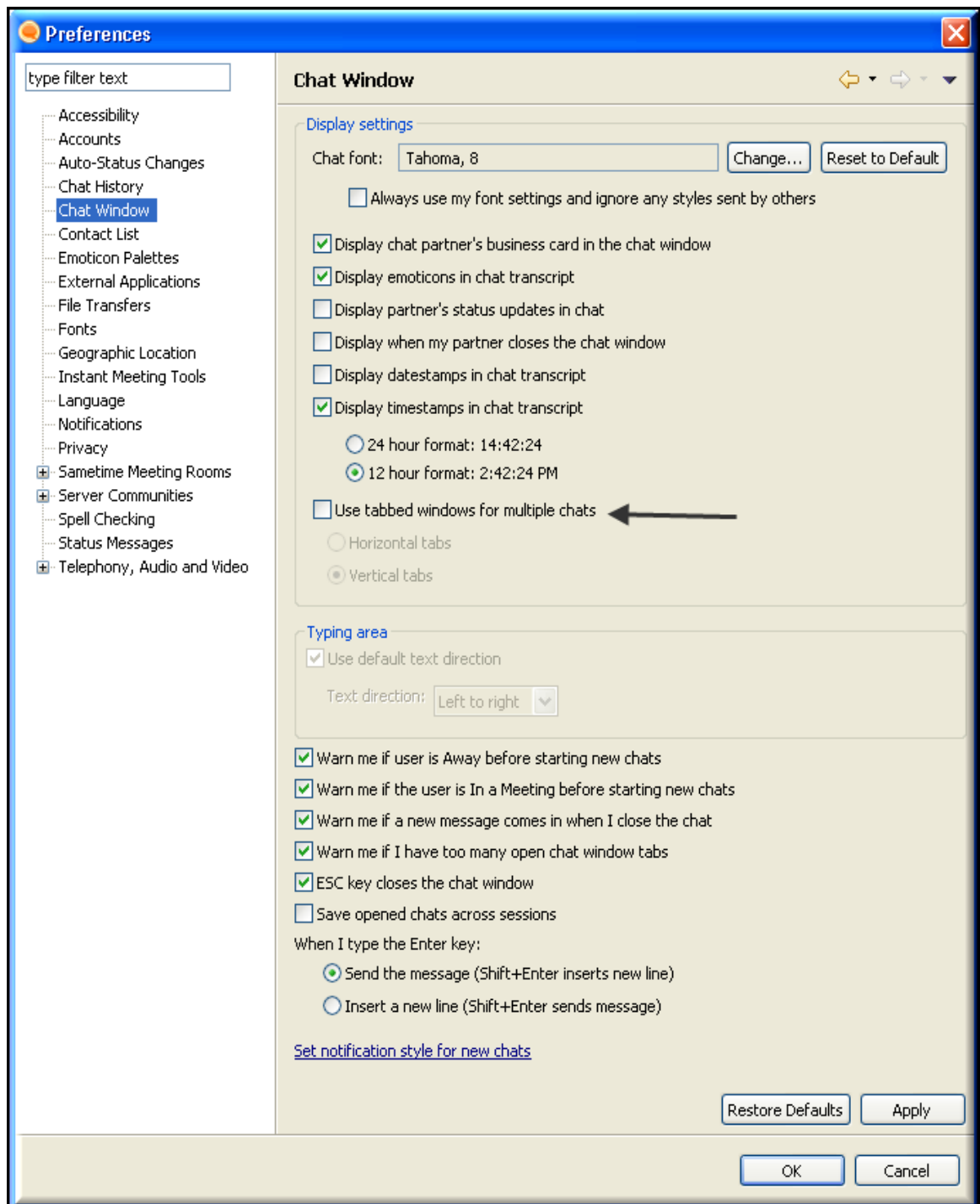


- \_\_\_d. Click **OK**.
- \_\_\_e. The status message can be a useful item for conveying additional information to other community members. For instance, let say you have to step out of the office for an appointment. You can set yourself to the *AWAY* state, and change your status message for *AWAY* to read "I am away from my computer until 4 p.m. Eastern Time." Now other users know not only that you are away, but that you will be back at a certain time. This saves tremendous amounts of personal time for individuals looking for resources. No more voice mail tag.
- \_\_\_f. It is also possible to have your availability-status automatically change to "In a Meeting" whenever you are in a meeting scheduled in your IBM Lotus Notes or Microsoft Outlook calendars.

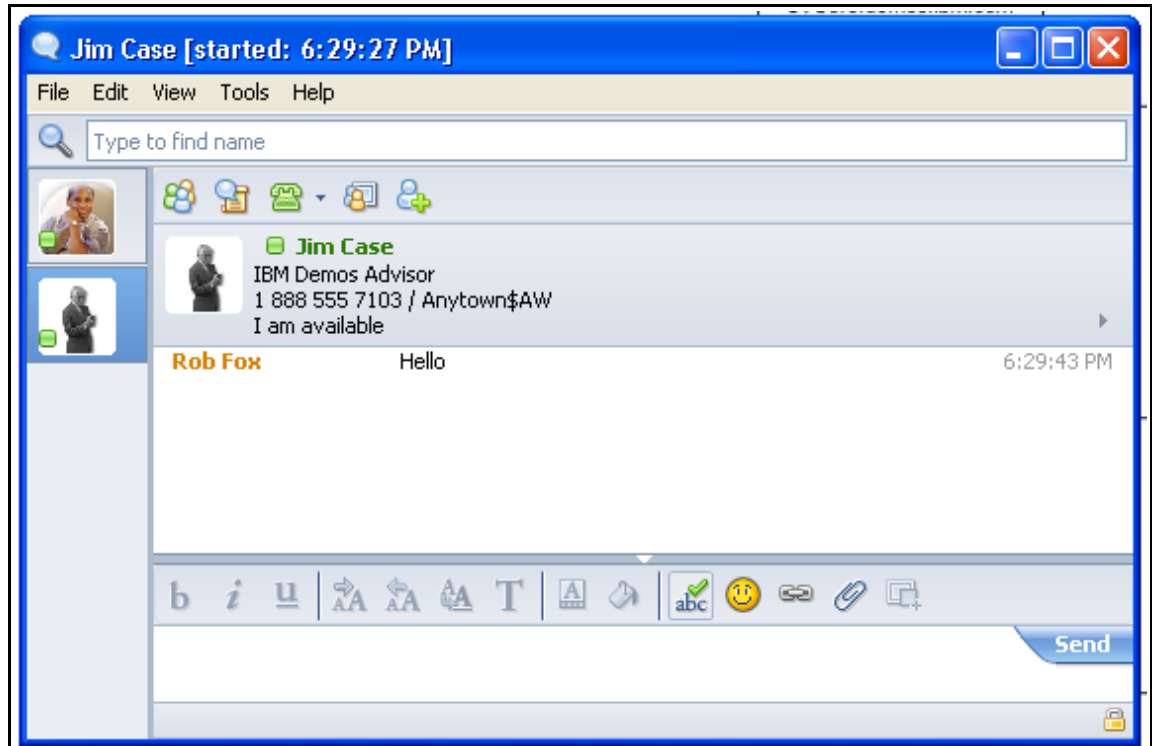
### 1.3 Starting a Chat Session

Lotus Sametime has several collaboration capabilities when it comes to Instant Messaging. The client is designed to help you collaborate and send information in the fastest and most suitable way. This lab will focus on the chat window. At first, we will set our chat window to display all the chat sessions in one window.

- \_\_\_1. Changing the chat window to use chat tabs.
  - \_\_\_a. Click on **File > Preferences** and then click on **Chat Window** in the navigator
  - \_\_\_b. Select **Use tabbed window for multiple chats** and then select whether you want your chat windows to display with horizontal or vertical tabs. If you select vertical tabs and you resize the width of these tabs, you can display on the tabs your chat partners' pictures, instead of their names.

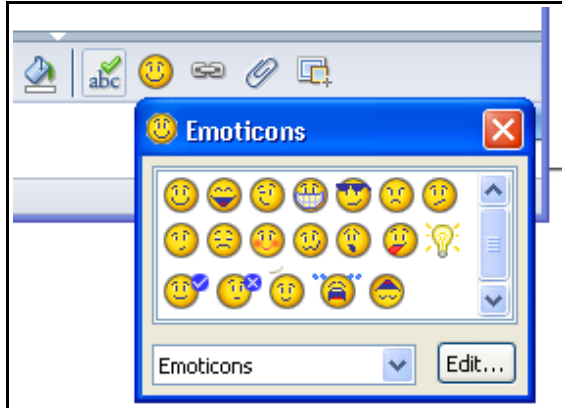


- \_\_c. Start several chat sessions with your colleagues and perform the following:



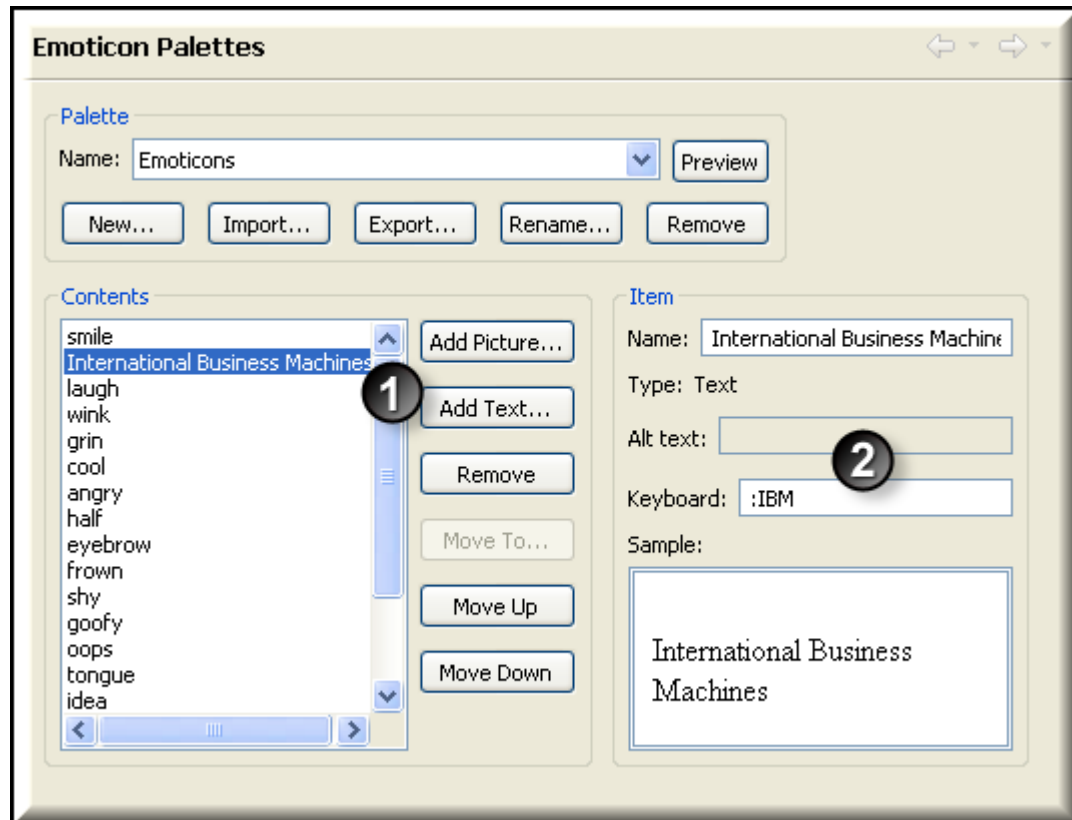
- \_\_d. Note that: When a chat partner sends new chat text, the tab for that chat window becomes highlighted
- \_\_e. Click that tab to put the highlighted chat in focus
- \_\_f. Resize the vertical space for the tabs to show your chat partners' photos instead of their names
- \_\_g. Click the **X** in a tab to close that active chat.

- \_\_2. Using emoticons when chatting with other users.
  - \_\_a. Start chatting with a contact. Write a message in the text box and click **Send** or press **Enter**
  - \_\_b. Send an emoticon to the user, by either typing one of the shortcuts such as :) or selecting from the emoticon palette on the chat window



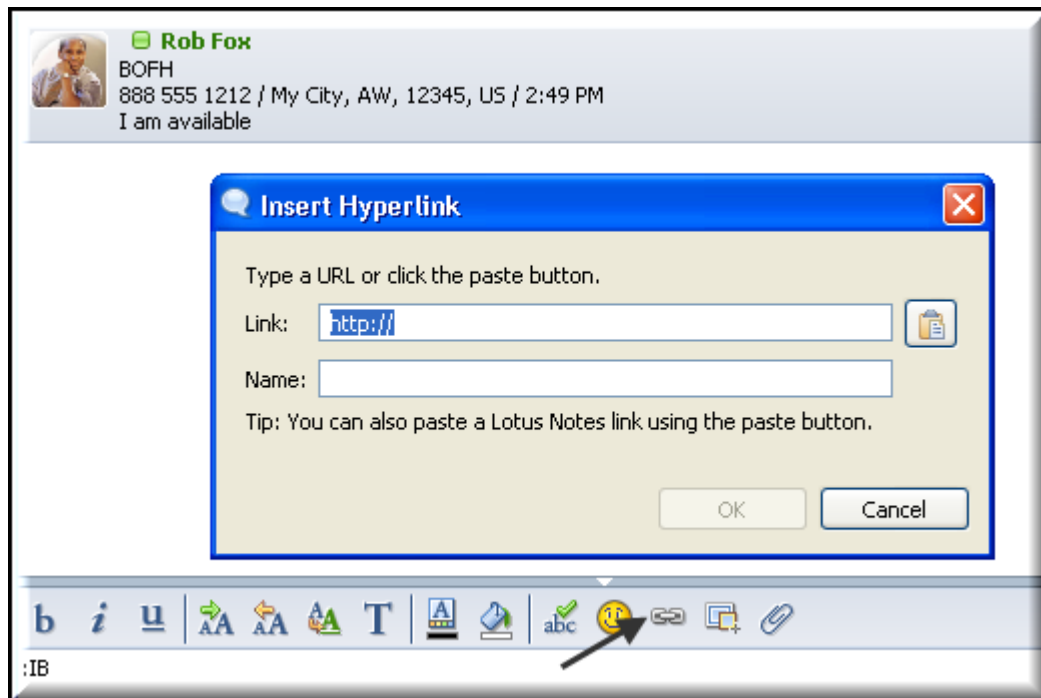
- \_\_c. You can also add new emoticons by clicking on the **Edit button**. You may think that emoticons are fairly silly but they can be used to save time typing. Let say that you frequently type out a long text string, for instance, *International Business Machines*. You can **Add Text**, name it *International Business Machines* and assign a shortcut to it such as **:IBM**

- \_\_d. Now when you type in that chat area, you can just type **:IBM** and it will automatically expand to *International Business Machines*. Try it.

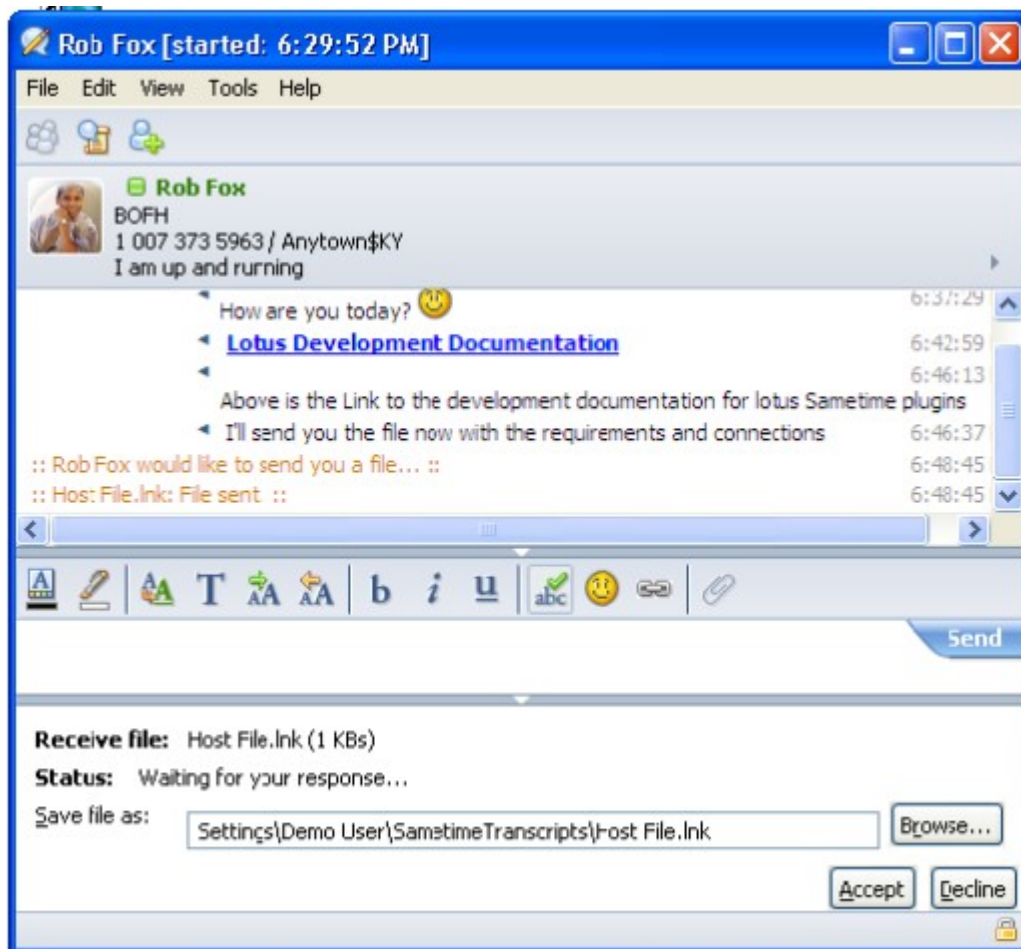


- \_\_3. If your chat partner sent you an emoticon you like and isn't available in your palette, perform the following steps to add to your palette:
- \_\_a. In an active chat window, right-click the emoticon that you want to save and click **Add to emoticon palette**
  - \_\_b. Select the palette to which to add the emoticon and then click **OK**
  - \_\_c. Update the fields under Item to identify this emoticon
  - \_\_d. Click **Apply** and **OK**

- \_\_\_4. Suppose you need to send a Notes document link or a link to a web page to a chat partner. To send a Hyperlink to your chat buddy...
  - \_\_\_a. Click the Hyperlink button as shown by the arrow.
  - \_\_\_b. Type the URL or click the paste button to paste a link you have copied to clipboard.
  - \_\_\_c. Write the name (optional) of the link to be displayed to the user. By typing the name, it is sent to your chat partner and they can just click it to go to the URL.
  - \_\_\_d. Click **OK**



- \_\_5. Sometimes you have documents that you want to share with your chat partner. You could email them, but Sametime Connect has a built-in file transfer feature. To send a file to your chat partner...
- \_\_a. In an open chat window, drag the file from your desktop or file manager to the message entry field in a chat window
  - \_\_b. Click **Send** to send the file to your chat partner
  - \_\_c. (Optional) You can send the file to your chat partner also by clicking on the send file icon, as shown by the arrow, and browsing to a file on your computer, then clicking **Send**.
  - \_\_d. When receiving a file, you can choose to accept or decline it. If accepted you can select a file name and location for the file.



\_\_6. Perhaps one of the best features of the last few releases is the ability to do screen captures. The tool works in a chat window context or as a stand-alone tool. To send screen captures of your desktop to your chat buddy...

\_\_a. Click the screen capture icon circled in red



\_\_b. Click and drag your mouse over the part of your screen you want to capture.

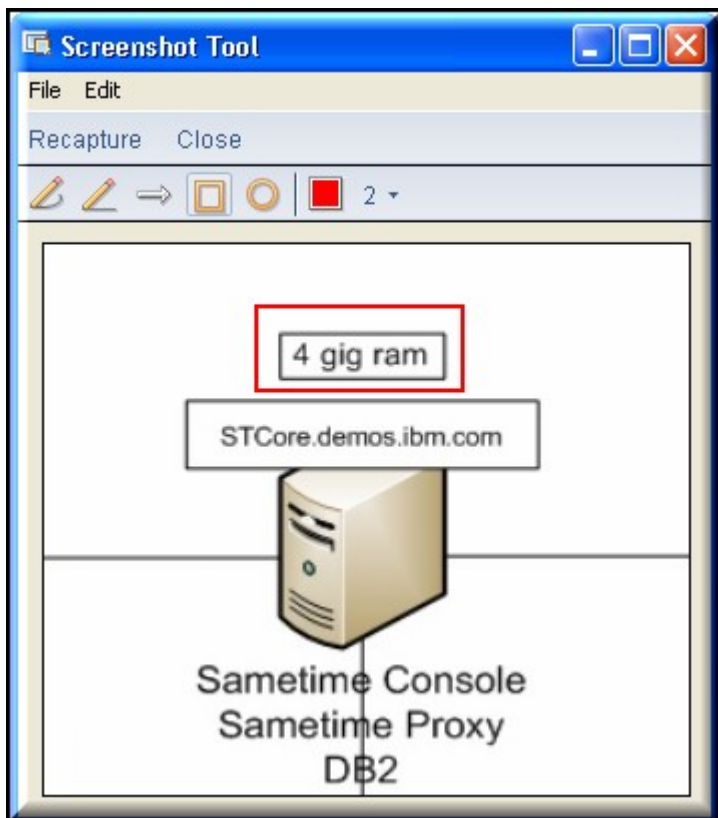
\_\_c. (Optional) In the Screenshot Tool window, click a color and line width for the shape you want to draw, then click one of the drawing tools and drag over the screen capture to draw the shape. You can draw additional shapes.

\_\_d. Click **Send** to paste the screen capture into the chat window and send it to your chat partner.

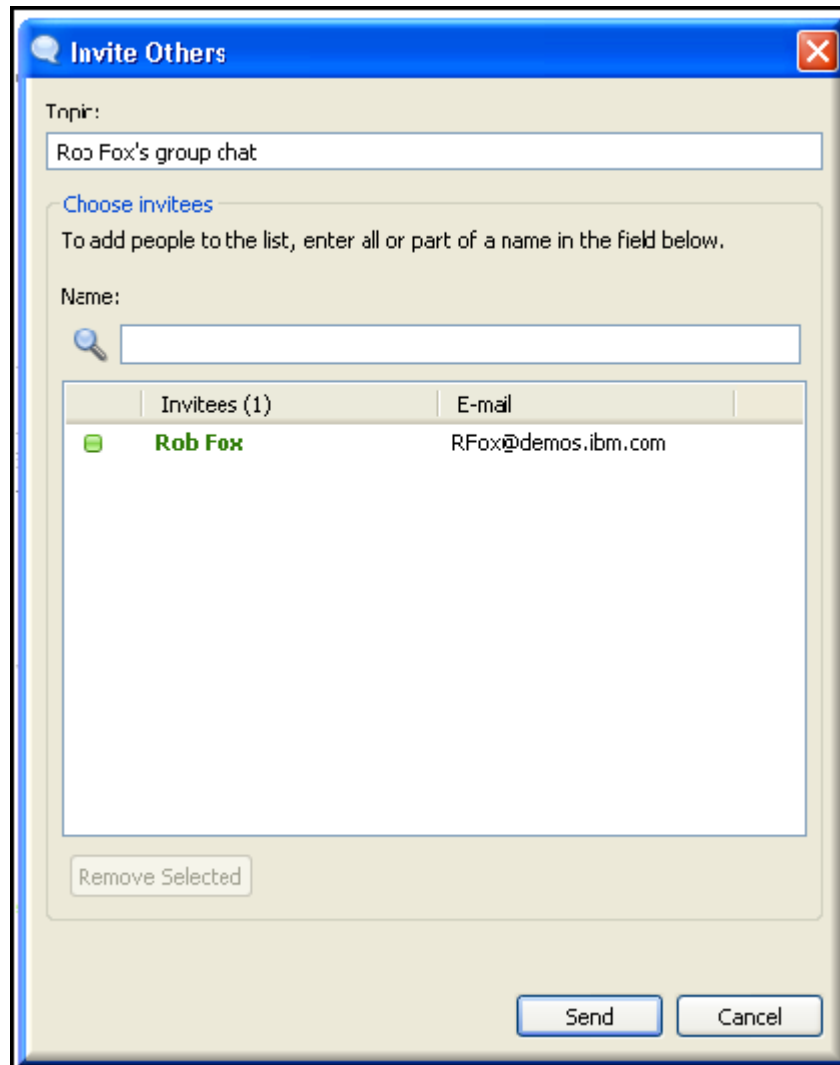
\_\_e. Click **Paste** into chat to paste the screen capture into the chat window without sending it to your chat partner. This is useful if you want to type in some additional information.

\_\_f. Click **Recapture** to abandon the current screen capture and take a new one

\_\_g. Click **Close** to abandon the current screen capture




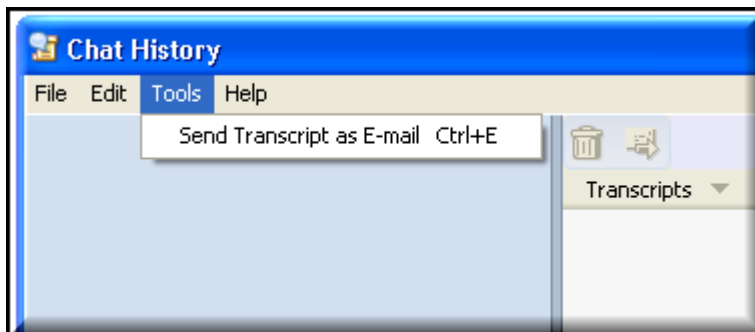
- \_\_\_7. At times you need to talk to more than one person.. With Sametime Connect, you can turn a one-on-one chat into a multi-person chat. To invite others to your chat...
- \_\_\_a. Drag the name of the person on your contact list who you want to invite to the message entry field of an open chat window. This person cannot have an availability status of "Do Not Disturb"
  - \_\_\_b. Click the name on the Invitees listed
  - \_\_\_c. Click Send to send the invitation to join the chat to that person.



- \_\_\_d. Optionally, you can click on the following icon at the top of the contact list to invite people to the chat



- \_\_8. Over time, a user will have many chats with users over various topics. Since we enabled the saving of chat transcripts at the beginning of the lab, we have been saving that information locally. To view the chat transcripts between you and another person..
- \_\_a. In your contact list, or chat window click **File > Show Chat History**
  - \_\_b. You can also right-click on a person and select **Show Chat History**
  - \_\_c. Or, from the chat window click on the following icon, at the top toolbar, to show the chat history
- 
- \_\_d. The Chat History window opens. On the left pane is the list of all the contacts with whom a chat has occurred with. On the top right pane are the dates of each chat session, and on the bottom right pane is the chat of the selected date.
  - \_\_e. To send a chat transcript by email, select the chat, then click the **Send Transcript as E-mail** button on the top toolbar.

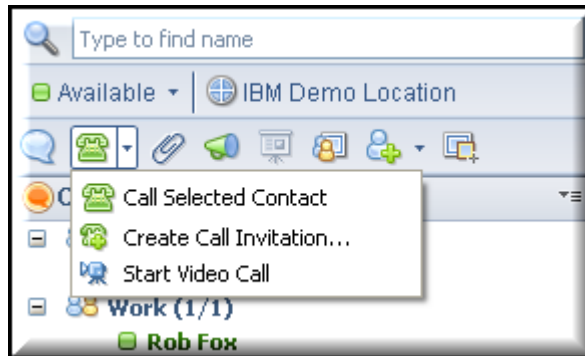


## 1.4 Working with real-time Audio and Video

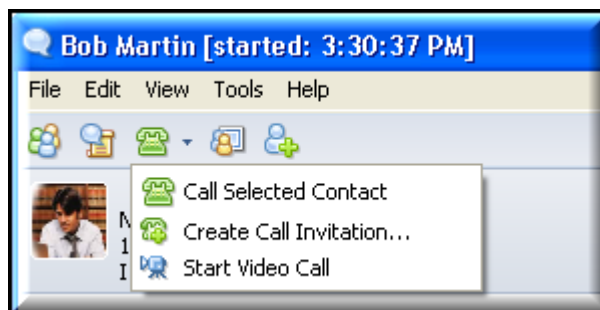
Lotus Sametime comes with built-in voice and video chat. With voice chat, you can place and receive audio calls with up to five participants, including yourself, using your computer's and your chat partners' computer audio capabilities. Your organization could also use an additional solution from a 3<sup>rd</sup> party telephony provider.

One of the advantages of a voice chat is that it is a *click-to-talk* solution. You do not have to know someone's telephone number. You just click on their name and start a call. Once you have a voice chat started, you can convert it to a video call so that you can both see and hear call participants. Only two participants, including yourself, can participate in the video call.

- \_\_1. To start a voice chat..
- \_\_a. Select one or more names from your contact list
  - \_\_b. Click the telephone icon at the top of the contact list.
  - \_\_c. Choose **Call Selected Contact**.



- \_\_2. To convert an existing text chat to a voice chat...
- \_\_a. In an active chat window click the telephony icon at the top of the chat window
  - \_\_b. Choose **Call Selected Contact**



- \_\_c. You will now see the voice chat appear. Once the person has accepted your invitation, all other persons in the call will have their business card photos in the window.

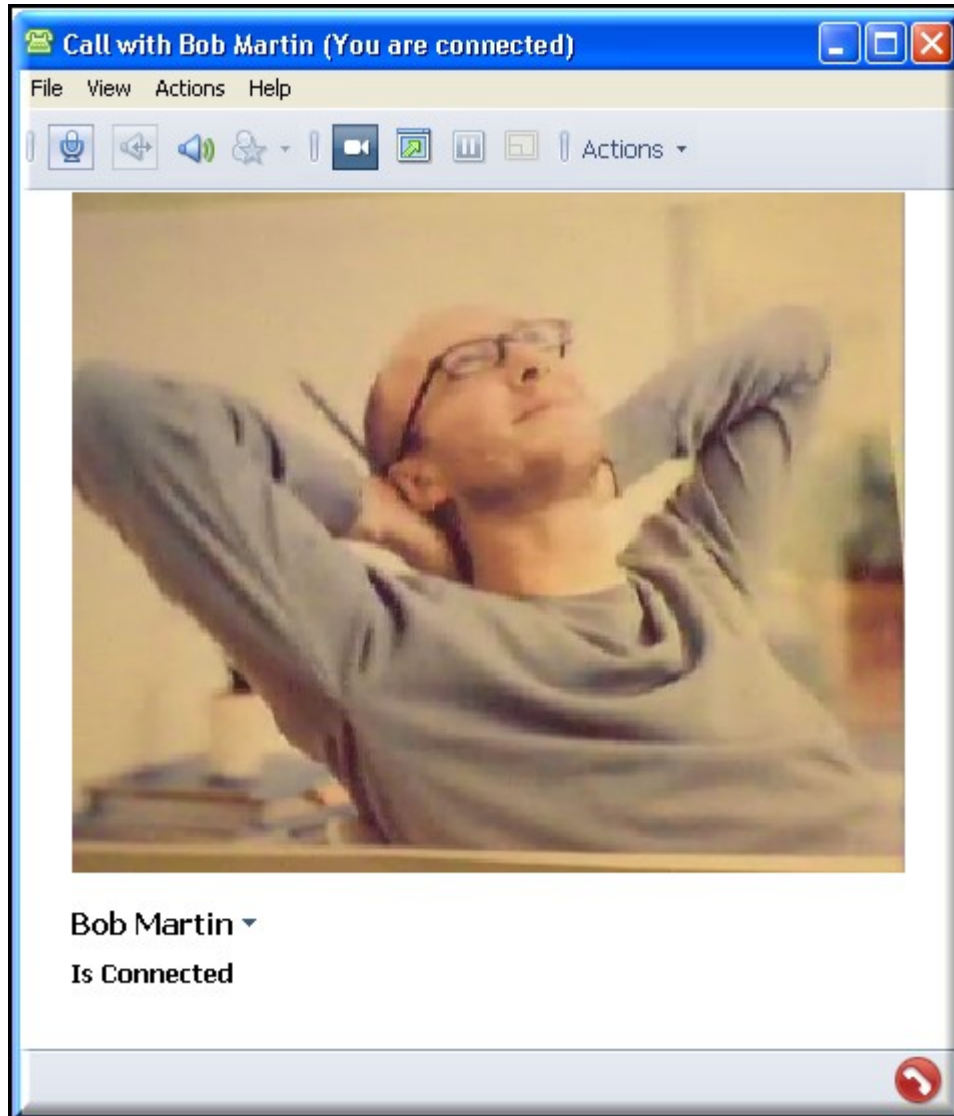


- \_\_3. (Optional: If you do not have a video camera, then skip this step) To convert a voice chat to a video call...

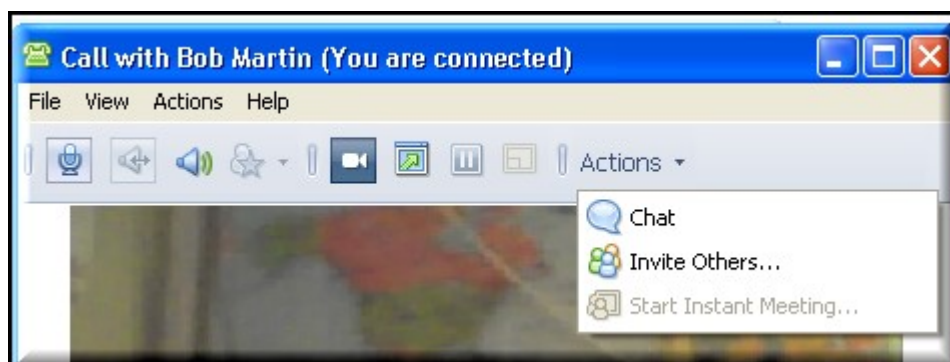


- \_\_a. Click **Start my video** from the video controls icon at the top of your chat window

\_\_b. The Video chat will appear in the window.



\_\_c. If you would like to continue to use chat during a video call, then select **Chat** from the **Actions** menu. This will open a new multi-person chat window and allow the use of all the tools available with chat.



- \_\_d. Continue to examine the other options in the video chat window. For instance, the icon of a box with an arrow indicates that you can make the video fullscreen. You can also stop your video, adjust sound settings, and mute your microphone.



- \_\_4. Perhaps you would prefer to always do video with your voice chats. To automatically start a video call for all your voice chats
  - \_\_a. Click **File > Preferences > Telephony, Audio and Video**
  - \_\_b. Select **Always show my video when making or receiving calls on my computer**

## 1.5 Lab 1 Review

In this lab we have covered the manual configuration of the Sametime Connect client. We have connected to a Sametime Community and examined the many features and tools associated with chat/awareness. We have also used the voice and video chat features that can provide significant cost savings in terms of time, toll charges, line usage and audio bridge minutes.







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