



# Chat

Help Documentation

## Chat

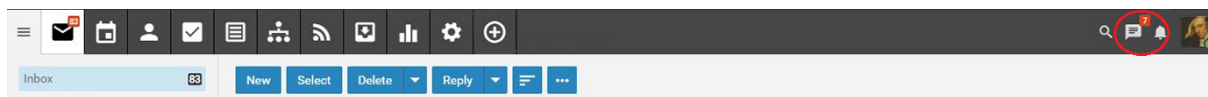
### Group Chat Overview

This feature is only available in SmarterMail Enterprise.

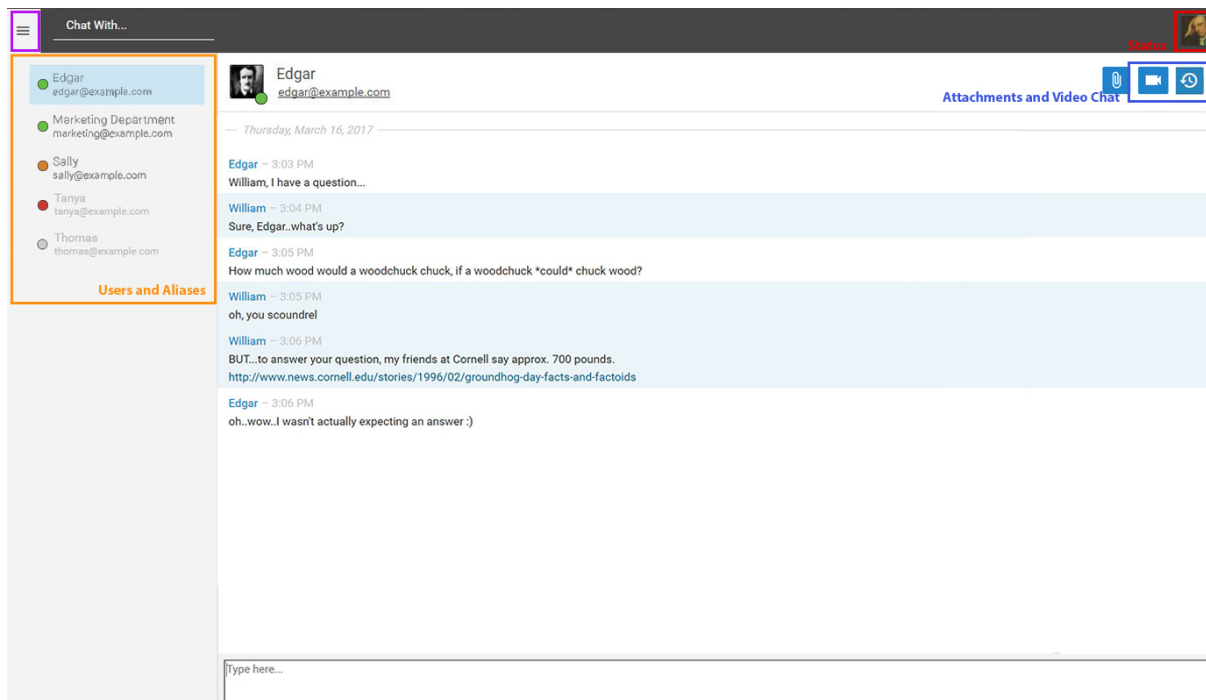
SmarterMail's group chat feature allows users on the same domain to chat with each other, instantly and securely, right within the webmail interface or using a variety of desktop and/or mobile chat clients, such as Pidgin, Adium, IM+ and others. Users can also create video chat rooms, where up to 8 people can interact using real-time voice and video. Video chat links appear in the messaging area when a chat is started with another user, but that link can be shared with anyone. If you don't want to use the web interface, most third-party chat clients that support the XMPP (Jabber) protocol can be used for text chat. There's no doubt email is a great communications mechanism, but there are times when real-time voice, video and text communication is crucial.

NOTE: In order to use Group Chat your SmarterMail installation MUST be secured with an SSL certificate. This is because the audio, video and live chat connections require HTTPS connections in order to work properly and securely.

To access the chat feature, click the Group Chat icon that appears in the top, right corner of the web interface. You can do this at any time or only when you receive a new live chat. When a new chat is received, the Group Chat icon will display an unread flag. (See image.)



Clicking on the live chat icon will pop out the live chat window. The live chat window is where you can interact with others via live chat. To help you understand the different areas of the Group Chat pop out, we created a simple interface diagram that labels various features and viewing areas.(click for larger image)



## Navigating Group Chat

### Chat Layout

The chat section of SmarterMail is divided into two main areas:

- The Group Chat Users/Aliases view - This area displays the contacts on your domain. These are the people you can chat with. If aliases are set up so that multiple people can chat at the same time, those show at the top of the view with individual users showing below aliases. A user's chat status is also displayed. (The status for an Alias is not displayed because aliases contain multiple individuals, so tracking the status of an alias won't work since each individual in the alias can have a different chat status.)
- The actual chat area. This is where your live chat occurs. Previous chats are listed, in order, beginning with the most recent chat session you've had with that user. The 75 most recent lines are displayed OR the chats you've had with that user in the last 30 days are displayed, if the total chat lines don't add up to 75. Scrolling up in the chat area will display older chat threads.

Chat With... - This area allows you to type in the username of an individual. The Chat With area is especially helpful in cases where a domain has a large number of users. Typing in a username allows you to find the person you want to chat with quickly and easily versus having to scroll through a large list of users.

### Modifying Your Chat Status

There are 2 ways to modify your chat status:

- Change it on the webmail interface by clicking on your user avatar.
- Change it on the live chat pop out by clicking on your user avatar.

As for the chat status definitions:

- Available - You are available to receive and respond to chat messages via the webmail interface. When a user is marked as Available, they will see other members of their domain who are also active and available in chat.
- Away - You are logged into chat, but are away from your computer and may not respond right away.
- Do Not Disturb - You are logged into chat, but are busy. Therefore, you're not available to chat at the moment and may not respond for an extended period of time.
- Offline - When this setting is checked, any user that is offline will appear in the users list, but the user name and availability will be greyed out. Deselecting this will hide all offline users from the list.

Clicking on your avatar also displays 3 other options:

- Open Help - This opens the help documentation for SmarterMail. By default, it will open the help document to the page in help that corresponds to the page you're currently on in the web client.
- About SmarterMail - Opens a modal window that displays the version of SmarterMail that's running, the version number, and copyright and licensing info.
- Logout - This will completely log you out of SmarterMail, NOT simply log you out of chat. To stop receiving group chat messages, you need to set your status to Offline.

### **3 Bar Icon**

At the top of the Chat view you'll see the 3 Bar icon. (Highlighted with a purple box in the diagram, above.) The Burger icon allows you to hide or show the list of Group Chat users, which is extremely beneficial when you're on smaller devices, such as a tablet or smartphone.

## **Starting an Audio or Video Chat**

SmarterMail's group chat includes real-time audio and video chat for user-to-user interaction. To start either an audio or video chat with another user, simply click the Actions (...) button and choose the type of chat you want to start and that call will be started with the user. The video window will overlay on top of the group chat window.

## Sharing Files and Links

To share a file, you can simply drag files into the chat area or use Actions (...) button. Depending on the file type, when a file is shared a thumbnail will display for image files such as .JPG and .PNG file types and/or a link to the file is displayed. When someone clicks on the thumbnail or link, a preview of the file will be displayed in a new browser window so that the recipient can look at the file before they download it. Shared links can just be pasted in the live chat box, but they will also display a thumbnail of the page that's linked to, and links open in a new window regardless.

## Searching Group Chats

This feature is only available in SmarterMail Enterprise.
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On occasion, you may need to refer to a previous chat conversation you had with a contact. One of the best things about SmarterMail is that it indexes all communication, so all of your chats are stored and, therefore, retrievable, so your information is never too far away.

### Start a Chat Search

There are 2 ways to search group chats:

- Each user has the ability to download their own chat transcripts, or
- Depending on how Message Archiving is set up, a system administrator and/or a domain administrator can use Message Archive search.

### User Chat History

When viewing a group chat you've had, either with another user or with a group (Alias), in the chat window, next to your Display Name, is an Actions (...) button. Clicking that, and selecting "Download chat history" allows you to download a text file that is the history of all of the chats you've had with that user or group. You can save a zipped version of that file (it's compressed because that text file can be quite large) to your local machine, then open it in your favorite text editor. Using the search feature of that text editor allows you to find the search phrases you're looking for as well as the entire threads where those search phrases were discussed.

### Message Archive Search

As mentioned in other places in this help document, SmarterMail has the ability to archive any and all communications that travel through it. SmarterMail archives at the Spool level, which means that any message that is sent through, or received by, SmarterMail is archived before any additional actions are taken on it. So, if a message comes into a mailbox but the user deletes it, SmarterMail will still have that message saved in the archive because it's stored BEFORE the message reaches that end user. The

same is true for group chat. That said, the ability to do a full archive search on group chats depends on how the system administrator has Message Archiving set up for your particular domain. For archive search availability, you'll want to check with your domain administrator first, then your system administrator.

## Connecting to Third-Party Group Chat Clients

This feature is only available in SmarterMail Enterprise.

If you prefer to use a third-party client to receive and respond chat messages, you will need to ensure the chat client supports the XMPP (or Jabber) protocol. Examples of chat clients that support XMPP include Adium, Digsby, iChat, Pandion, Pidgin and Trillian.

More information on integrating SmarterMail's chat feature with commonly used third-party clients may be found in the SmarterTools Knowledge Base .

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