

Net Phone Chat

The Net Phone Chat program allows Net Phone users connected to the Net Server to interactively have chat conversations.

This program works as a companion program with Net Phone to allow workers in the enterprise to communicate using real time text-based communications with others. Using Net Phone Chat you can have individual conversations with anyone else on the sever with the same feature installed.

Chat can also be used to send a broadcast message to an individual or to an entire group. A broadcast message is a one-time message that will appear on the recipient's Chat window. For more information about this feature see ["To Send a Broadcast Message" on page 4](#) .

Chat Operation

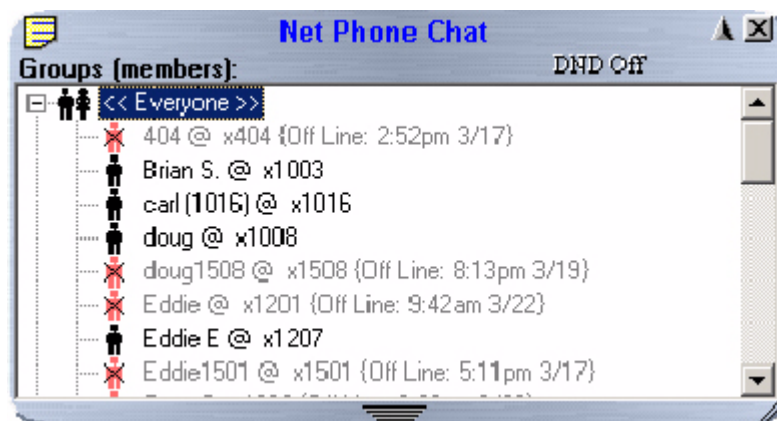
The primary function of Net Phone Chat is to allow you to place and receive chat calls and conduct one-on-one chat conversations with other chat users in your company. Chat also contains some features that may make Chat more user friendly in certain applications. These include a Do Not Disturb, changing the "quick send" text buttons, and the ability to form groups of users for broadcast messages,

Using Chat Messaging

This section defines how to place a call to another Chat user, how to communicate with that person, how to answer an incoming Chat communication, and how to send Broadcast messages.

- **To Access Chat** – Click the Chat button on Net Phone. The following screen will display.

Note It is possible to show only active users by the Feature Tab setting in the Presence menu; see ["Configuring Chat" on page 11](#) .



To Place a Chat Call

- Choose whom to send a message to by expanding a group in the main Chat window. If someone has logged out of Net Phone Chat the icon will appear in red, and it will show Off Line and the date and time they went off line. You cannot place a chat call to someone who is off line.

Note If you do not want to receive a Chat response you can send a Broadcast Message.

- Double click on the person with whom you wish to converse
or Right click and choose Chat Call from the menu.

This will bring up a Silent Message Conversation window, which is used to send and receive messages opening a chat conversation. You can have multiple, simultaneous chat conversations ongoing at the same time, and Net Phone Chat has a built in feature that uses different background colors on different conversations to help you to identify which message you are sending.

To Answer a Chat Call

- A Silent Message Conversation window will automatically pop up showing who is calling you and a sound will play based upon your Preference Settings.
- You must respond within 30 seconds to this message or the caller will get a message "User did not respond."
- Ongoing conversations follow those described in ["To Send a Text Message"](#) and ["Options During a Chat Conversation"](#) .

To Send a Text Message

- Press a pre-programmed Response button or

Type the message into the text box at the bottom of the window and press either the Send button or the Enter key on your keyboard.

The messages you send will be shown in blue and any responses from the other party will be shown in red.



Options During a Chat Conversation

Several options are available to the user when right clicking within the conversation window to open a menu of options.



To Call the Person using your Phone

This option is to make it more convenient when you need to speak with the person rather than just sending text.

- Click Call on Phone item in the menu.

To Open a Shareboard (Collaborative) Session

- Click Share Shareboard Screen. This option is only offered once the called party has responded to the Chat session.

To Copy the Conversation

- Click either Copy or Copy All to copy the highlighted or all of the conversation to the Windows Clipboard for pasting into another application.

To End the Conversation

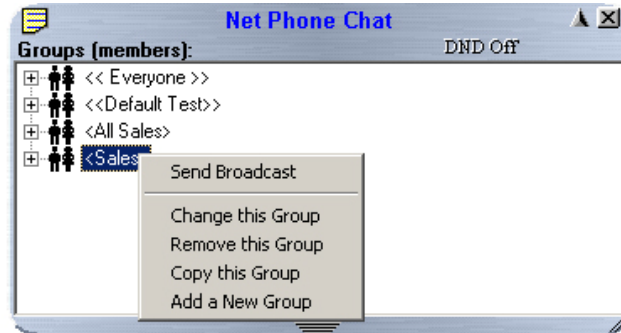
- Press the Close button to end the conversation.

To Send a Broadcast Message

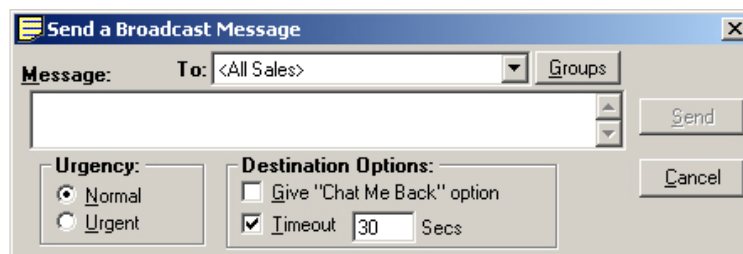
Net Phone Chat allows you to send a broadcast message to one or more Chat recipients. For example, if the Sales Manager would like to call a meeting with all of his sales representatives, he could use this feature to send a message to the Sales Group telling them there is an important meeting in 15 minutes in the conference room.

1. To initiate a broadcast message, double click on any group name in the Chat Window or Right click on any group name and select Send Broadcast.

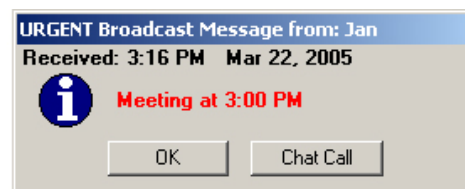
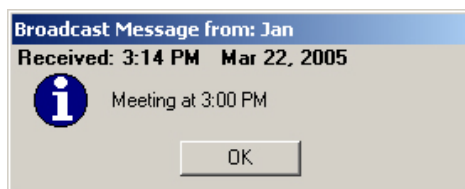
Note Personal group lists will appear within single brackets (e.g.: <My Sales Group>) and system groups lists will appear within double brackets (e.g.: <<All Sales People>>).



2. Enter a message into the Message box.



3. Define the Urgency, Normal or Urgent for the message delivery. When Normal is selected your Broadcast message will be sent to your recipient(s) using black text and when Urgent your recipient(s) see red text as follows:



4. Define the Destination Options:

- A checkmark in the Timeout (default choice) will display the message for the number of seconds defined in the time box (default is 60 seconds).
- Enter a checkmark in the Give "Chat Me Back" option box will give your recipients the option to send a Chat message back to you once they receive your Broadcast Message.

Note Be aware that when using the "Chat Me Back" option sending to a group of people, all recipients will have the Chat back option and if everyone responds, it could result in a large number of simultaneous chat calls back to you.

5. Click Send.

Chat Feature Operation

Do Not Disturb

The Chat Do Not Disturb (DND) feature is disabled by default. For this feature to operate, the “Enable Do Not Disturb” feature must be selected in the Feature Tab of Chat Preferences. This feature works independent of Net Phone’s DND. See [“Interfacing with Other Programs” on page 15](#) .for details on how to automatically link the Chat DND status with Net Phone’s.

To Set Do Not Disturb

When you want to prevent further incoming chat calls, the Do No Disturb feature can be turned on. This feature allows you to provide a specific message, such as “In a Meeting Until 3pm”, to anyone attempting to place a chat call to you.

- **To go into DND status** – right-click your mouse on the DND Off text on the Standard Chat View. Click No in the “I’m Available to Receive Chat Calls?” window and enter an appropriate message to be sent to anyone attempting to reach you. Clear the box by clicking the in the upper right-hand corner.



While in Do No Disturb the main window will show the text DND On in red (as shown below).



- **Other Users Experience** – When a Chat call is placed to someone who has their Do Not Disturb feature set you will see a message showing “User Not Available” along with any return message they provided. If they didn’t setup a return message, the text “Do Not Disturb” will be shown.

To Clear Do Not Disturb

- **To Clear the DND Status** – Right click your mouse on the DND On text and select “Yes” – I’m Available to Receive Chat Calls. Clear the box by clicking the in the upper right-hand corner.

Response Buttons

All buttons can be changed on-line from the Silent Message Conversation window. The first 8 buttons can have their responses defined in Chat Preferences; all others can only be defined using the following procedure.

To Add/Change Text in Response Buttons

- Right click on the button to change and enter a Caption for the button, the conditions for the text and the text to send as follows:
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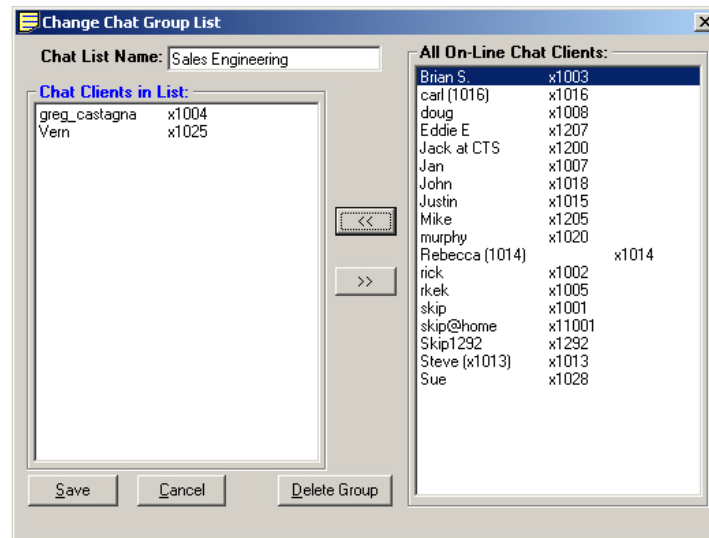


- **Caption** – Type in a caption for the button.
- **When Button is Pressed** – Select what the button will do when pressed by choosing one of the following:
 - **Send Text** – will send a text string to the other party on the chat call.
 - **Push URL** – will send a URL to the other party on the chat call and pop open a web browser window to that URL.
- **Send Text** – Type in the text message or URL you want to send when you click on this button. Your text message can be any length in size.
- **Send Text Message Immediately** – Check the box if you are sending text and you would like to send it immediately, without clicking on the Send button.
- Click **OK** to save the changes you have made to your Response Button.

Personal Groups

To Add or Change a Personal Group

- Right click a group name in the Chat window and choose either Add a New Group or, if offered, Change this Group to create a personal group. Name the group and add or remove names for that group as follows:



- Chat List Name – Enter a name for the group to identify your group. All names must be unique.
- Chat Clients in List – To add members to your group, highlight individuals you want to be part of your group in the All On-Line Chat Clients box and then click on the left double arrow (<<) button to move the members to the Chat Clients in List box. To select multiple individuals, hold down your Ctrl or Shift key while making selections by clicking the mouse. If you want to add a member that is not presently on-line, right-click your mouse in the "Chat Clients in List" and select the "Add an OFF-line client" menu item, then type in the name of the client.

Note The name of the client must exactly match the client name when he/she is on-line. To remove members from your group simply highlight the members and then click on the right double arrow key (>>).

- Click on Save when done.

To Copy a Group to Create a New Group

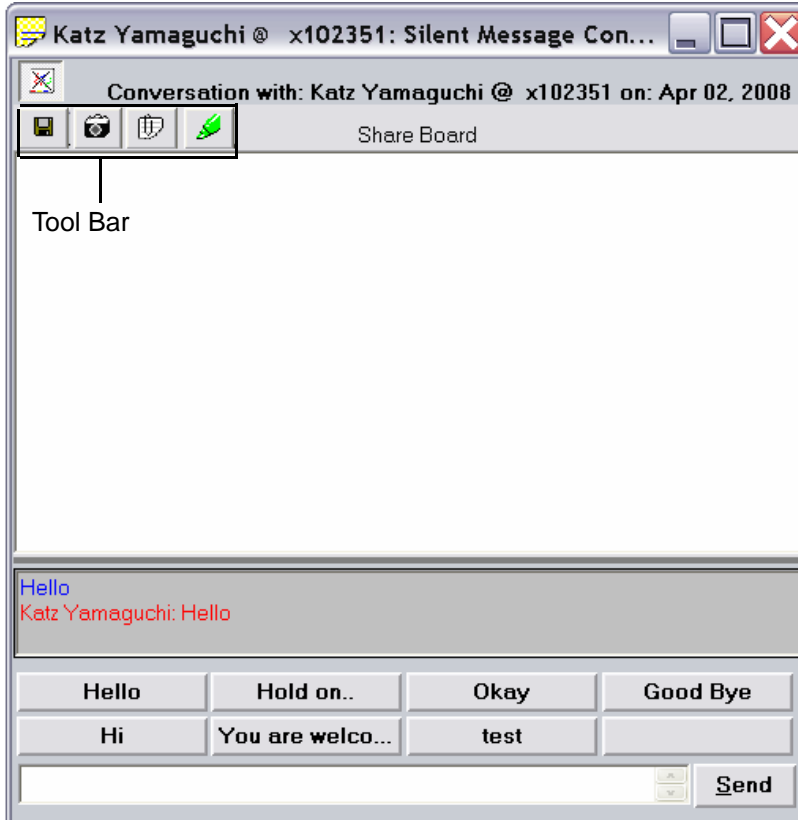
- To create a new group by copying another group, select the group to be copied, right-click on the group and select Copy this Group. Follow the same process for creating a new group above.

To Delete A Personal Group




To delete a group, right-click the group in the Chat List and choose the Delete Group option. A confirmation box will appear and needs to be affirmed before the group is actually deleted.


Shareboard Operation

To access the Shareboard option, you right click in the Message Window and choose Share Shareboard Screen. This action opens a new window on your PC and the PC of the person you are chatting. This window provides tools for sharing information on each of your PCs with the other user with an open Chat conversation.

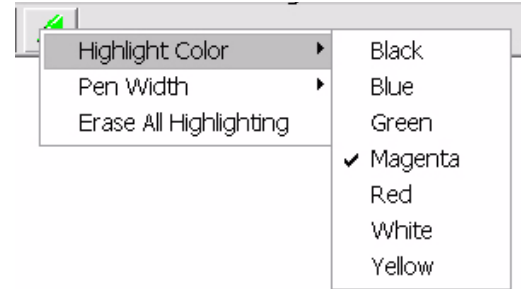


Shareboard Toolbar

-  **Main Menu** – Click this tool for main menu options.
-  **Screen Capture Tool** – Click this tool, your Shareboard screen disappears, and a cross-hair tool is provided to select an area on your screen that will be shared on the Shareboard of the other PC. To use, click and drag the tool to create an area for display on the Shareboard. Only the area selected will show on the other PC.
-  **Copy from the Clipboard** – Click this tool to paste an image that may have been captured using the Print Screen or Alt-Print Screen into the Shareboard screen.

- 
Screen Pen Tool – Click this tool to draw using the pen. By right clicking, a selection for choosing the color and width of the pen can be chosen or all pen markings can be erased on the screen.

To make it simple and quick to change the color and width of the Pen Tool during a conversation, the keyboard's Left and Right Arrow keys can be used to cycle through the seven possible choices of color for the pen. The Up and Down Arrow keys can be used to cycle through the four thicknesses of the pen from thin to fat.

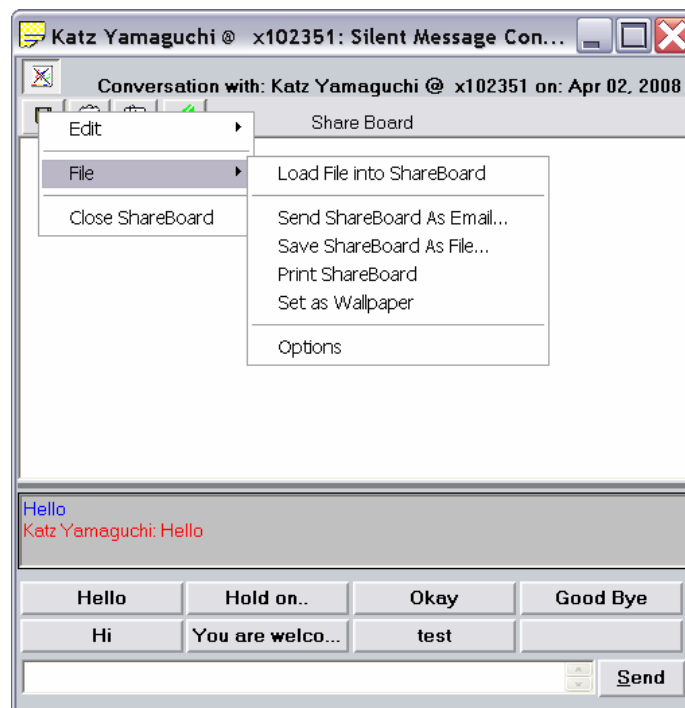


Drag and Drop Files

Files can be shared using the Shareboard. A file such as a .JPG file can be dragged onto the White Board window and the image will display on the other's shared window. Also, other files can also be shared such as Word documents. These files will be shared and require an appropriate application on the other PC to open that file. For example, if Word is running on the other PC, the Word document will open on the other PC. The user will be capable of using the Pen Tool to mark areas on the document when viewing the White Board screen. To make changes on the document requires switching to Word, editing the document, saving the file and then sending the edited copy back to the originator.

The Main Menu

Two important tools for the Shareboard session are contained under the File Menu item. These include the ability to Send Shareboard as Email... and Save Shareboard File As...



Send Shareboard as Email...

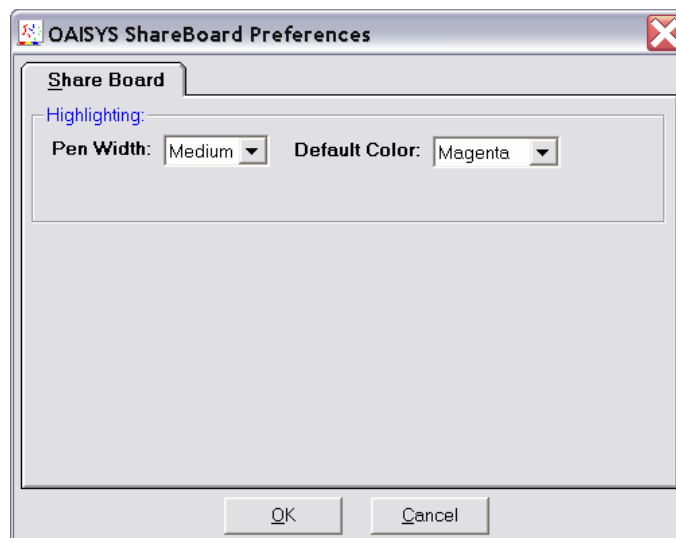
Using this tool opens your e-mail service on your PC, takes a snapshot of the Shareboard, including all pen marks, and attaches the image as a JPG file to the new e-mail message. You then can address the e-mail; create a subject and type a message to go along with the attached file.

Save Shareboard File As...

Using this tool causes a snapshot of the Shareboard to be saved as a JPG file. The screen opens to a "Save" window to allow you to choose the file name and location for the file to be saved. The default location is under your "...Documents and Settings/<user name>/Local Settings/Application Data/CTS/NetPhone".

Shareboard Setup

The Setup menu item provides access to the Shareboard Preferences screen.



- **Highlighting** – The Shareboard Preferences screen defines a default Pen Width and Color to be used when Shareboard session is opened. During a communication session, these can be changed at will as described above.

Configuring Chat

You configure Chat by making parameter choices in the Preferences dialog box. You can make Chat integrate with other applications including your soft phone by using the DDE Interface commands. These are defined in the [“Interfacing with Other Programs” on page 15](#) .section later. Examples are provided for using these commands with Net Phone are also included.

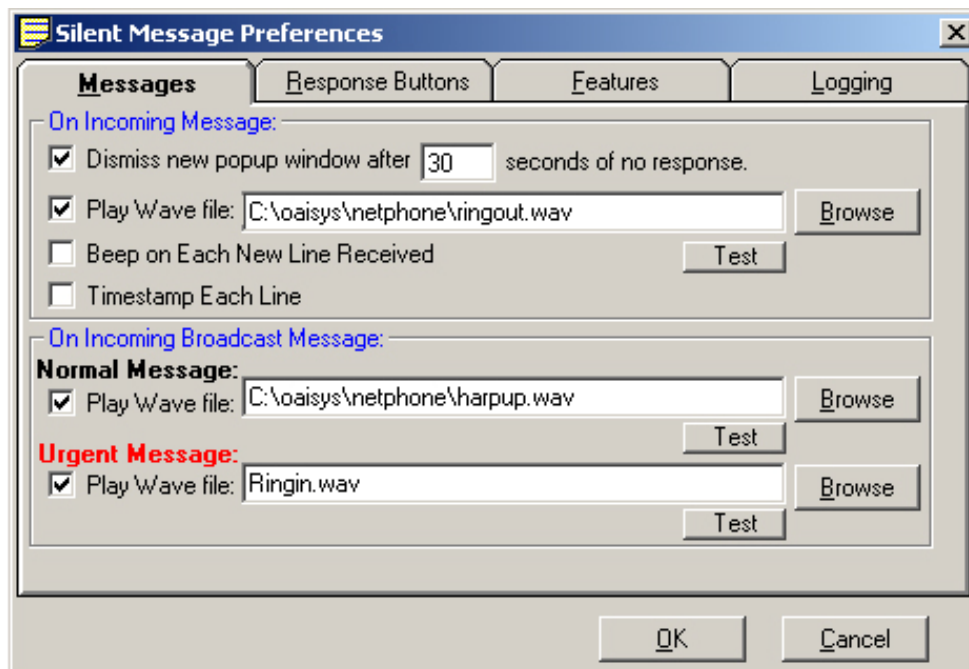
Preferences

To set up your preferences, click the Main Menu button, select setup, then and preferences (shown right). This will bring up the Silent Message Preferences window (shown below).



Messages Tab

These settings define the arrival responses provided for incoming and broadcast messages.



On Incoming Message

- **Dismiss new popup window** – Check the box and specify the time (in seconds) when no response is seen when a new message arrives. This will tell Chat to notify the caller of no response after a certain length of time. The response message returned is “User didn’t respond.”
- **Play Wave file** – Check the box to play a WAV file each time a new message comes in. Click on Browse to specify a different WAV file. You can test your WAV file by clicking on the Test button.
- **Beep on Each New Line Received** – Check the box to have Chat beep each time a new line arrives into the conversation. Click Test to verify operation.
- **Timestamp Each Line** – Check the box to show a time stamp Message Box each time a new message is received.

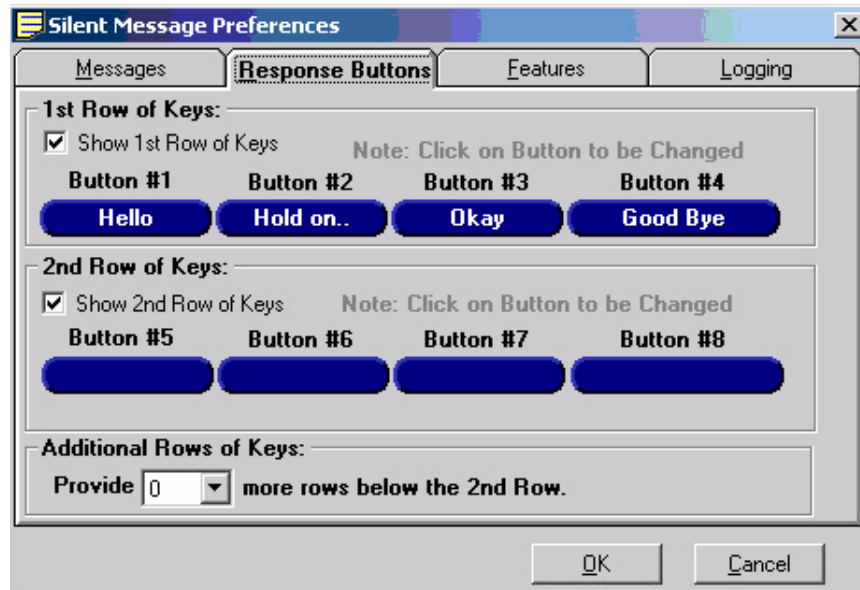
On Incoming Broadcast Message

- **Normal Message** – Check box next to “Play Wave file:” to allow playing a WAV file each time a new broadcast message comes in. You can click on Browse to specify which WAV file you want to play. You can test your WAV file by clicking on the Test button below the file name.
- **Urgent Message** – Check box next to “Play Wave file:” to allow playing a WAV file each time an urgent broadcast message comes in. You can click on Browse to specify which WAV file you want to play. You can test your WAV file by clicking on the Test button below the file name.

Response Buttons Tab

The Response Buttons are a series of buttons located at the bottom of the Chat Message Window. These can be customized to meet your specific needs by clicking on these buttons to send immediate messages to someone without typing or clicking the Send button. Once a communication channel is established, you just click the Response Button with the message you want to send.

- Define the Number of Keys
 - Show 1st Row of Keys – Check this box to show first row of four Response Buttons.
 - Show 2nd Row of Keys – Check this box to show the second row of four Response Buttons. The first row must also be checked.
 - Additional Rows of Keys: – Enter or select a number from 0 to 4 to specify additional rows of four buttons.



► To Change Message in Response Buttons

Note Only the first eight Response Buttons can be changed from the Preferences window. All buttons can be changed on-line when in a conversation. The procedure to change a button is identical in the Preferences Window as when done on-line.

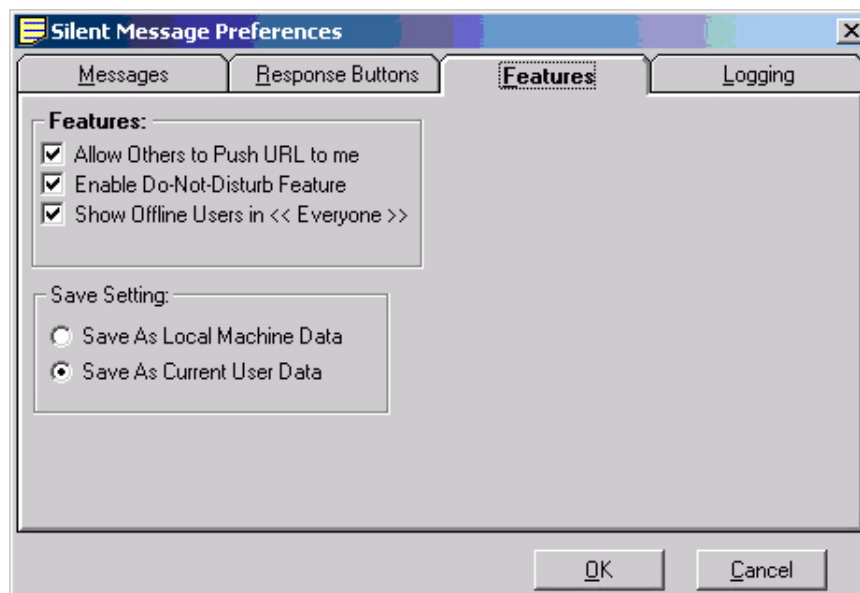
- Click the button to change and the “Setup Custom Reply Button” window will appear:



- Caption** – Enter a caption for the button.
 - When Button is Pressed** – Select what the button will do when pressed by choosing one of the following:
 - Send Text** – will send a text string to the other party on the chat call.
 - Push URL** – will send a URL to the other party on the Chat call and pop open a Web Browser window to that URL.
 - Send Text** – Type in the text message or URL you want to send when you click on this button. Your text message can be any length in size.
 - Send Text Message Immediately** – Check the box if you are sending text and you would like to send it immediately, without clicking on the Send button.
- Click **OK** to save the changes you have made to your Response Button.

Features Tab

In the Features tab, two features can be enabled and the location where the settings will be saved is specified.



Features

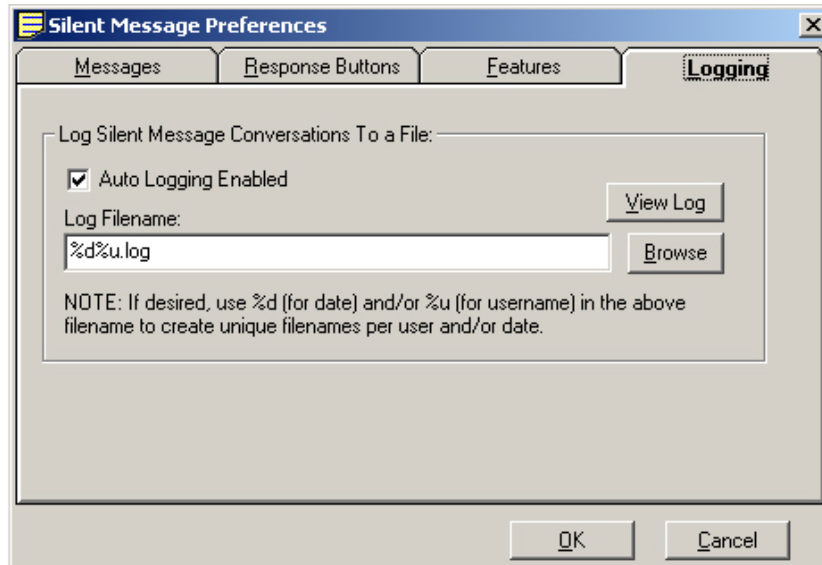
- **Allow Others to Push a URL to me** – Check to allow URL's to be pushed to this location by others. When disabled, other users cannot push a URL to open a browser window on your PC.
- **Enable Do-Not-Disturb Feature** – Enter a check mark in the box to enable the Do-Not-Disturb option. This option allows you to block incoming Chat messages and returns a DND message that you specify to the caller.
- **Show Offline Users in <<Everyone>>** – Check (default setting) to show both online and offline users in the <<Everyone>> group. Remove the checkmark to only show online users.

Save Setting

- **Save As Local Machine Data** – Click to enable this option if the settings are to apply to all users of this PC.
- **Save As Current User Data** – Click to enable this option if the settings are unique for each user of this PC.

Logging Tab

The logging tab window is used to enable the logging of all conversations to a file and define how the file is to be named.



Log Silent Message Conversations To a File

- **Auto Logging Enabled** – Enter a check mark in the box to log all Chat conversations to a file. If you do not wish to log the conversations to a file take the checkmark out of this box.
- **View Log Button** – Click the View Log button to view your current log file.
- **Log Filename:** – Enter a file name or click on Browse to select where you would like your files to be logged.
- Use the variable **%d** to log the conversation to a file name that includes the date. For example, if you had a Chat conversation on November 3, 1999, your file name would be 110399.log.
- Use the variable **%u** to log a conversation to the file name of the user that you conversed with. For example, if you had a conversation with January your file name would be Jan.log.
- You can combine the use of the variables if desired. For example, the log file name could be C:\PROGRAM FILES\CTS\CHAT\%d%u.log. The log files will be defined first by date, then by the name of the Chat party. Reversing the parameters (..%u%d.log) would be organized by name then date.

Interfacing with Other Programs

Net Phone Chat is designed to operate with other Windows applications. For example, a user of a phone program, such as Net Phone, may want to press a button to immediately open a chat window with your ACD supervisor when you're on an Urgent Call. Or you may want to coordinate the DND settings of your phone with the DND of Chat. Or you may need to periodically send a broadcast message to a group of people based upon a trigger such as a meeting reminder. These types of operations are supported by a DDE Command interface. This section defines the format for the DDE Command Interface, its supported commands with examples with how they can be used.

Format of the DDE Command Interface

Other programs can be setup to send DDE commands to trigger actions in Chat to perform a set of functions. The basic format for this DDE command is as follows:

- Application Name: MSGPOP
- Topic: SYSTEM
- DDE Execute String: <Command>

Command 1 – Open a Chat Session with this Extension Number

Format: CALLEXT, Ext #, Msg_Type, "Message", Send_Option where:

- CALLEXT = The command name.
- Ext # = the extension number of the person to chat with. If you leave this blank, the main Chat window will pop up and allow you to manually select the person.
- Msg_Type = leave blank, future feature.
- "Message" = Message to be sent. When using Net Phone, call and system variables can be used in the message.
- Send_Option = I or C
 - I – send message immediately
 - C (or blank) – type message into user buffer but wait for user to press SEND

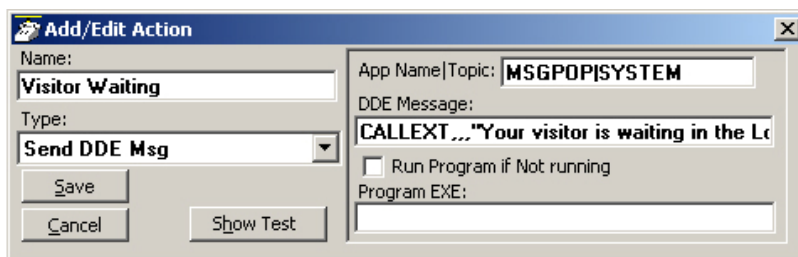
Example: The user sits at the front door and acts as the receptionist and needs to inform people when someone is waiting in the lobby.

1. In Net Phone create a User Defined Action using the type Send DDE Msg and name it appropriately.

In App Name|Topic enter: MSGPOP|SYSTEM

In DDE Message enter: CALLEXT,,,"Your visitor is waiting in the Lobby",I

Note No extension was specified to allow the person to choose whom the message is to be sent.



2. Choose a key on Net Phone, right-click and select Change Key. Name the key, choose the colors, and select a type as User Defined Actions. Select "Visitor Waiting" from the list of actions and Save.

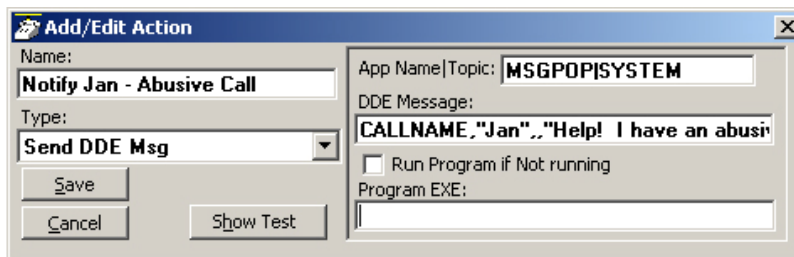
Command 2 – Open a Chat Session with this User Name

Format: CALLNAME, "Name", Msg_Type, "Message", Send_Option where:

- CALLNAME = The command name.
- "Name" = The name of the person to chat with. This name must match the name used in the Chat directory. If you leave this blank, the main Chat window will pop up and allow you to manually select the person.
- Msg_Type = leave blank, future feature.
- "Message" = Message to be sent
- Send_Option = I or C
 - I – send message immediately or
 - C (or blank) – type message into user buffer but wait for user to press SEND

Example: Agents in a Call Center want to quickly notify the supervisor that an abusive caller is on the phone. The supervisor's name is Jan and the persons phone number (formatted for easier reading) and name should be included when available using Caller ID.

1. In Net Phone create a User Defined Action using the type Send DDE Msg and name it appropriately.
 In App Name|Topic enter: MSGPOP|SYSTEM
 In DDE Message enter: CALLNAME,"Jan",,"Help! I have an abusive call from: %J/%N",C



2. Choose a key on Net Phone, right-click and select Change Key. Name the key, choose the colors, and select a type as User Defined Actions. Select "Notify Jan – Abusive Call" from the list of actions and Save.

Command 3 – Set DND option on or off in Chat

Format: DND,DND_State,"Message" where:

- DND = The command name.
- DND_State = Enter "ON" for turning on DND or "OFF" when turning off DND.
- "Message" = Enter the text message to be sent to callers reaching this station. If the message is left blank (opening and closing quotes only), then the message previously used will be displayed without change.

Example: The Net Phone user would like to have Chat DND follow the status of Net Phone's DND status automatically when Net Phone is changed. In this case, Chat should be in DND when the user is in a meeting. Chat should reflect the same message that is seen on Net Phone DSS keys.

1. In Net Phone create a User Defined Action using the type Send DDE Msg and name it appropriately.
In App Name|Topic enter: MSGPOP|SYSTEM
In DDE Message enter: DND,OFF,

The screenshot shows the 'Add/Edit Action' dialog box with the following fields:

- Name: Chat DND Off
- Type: Send DDE Msg
- App Name|Topic: MSGPOP|SYSTEM
- DDE Message: DND,OFF
- Run Program if Not running:
- Program EXE: (empty)

2. In Net Phone create another User Defined Action using the type Send DDE Msg and name it appropriately.
In App Name|Topic enter: MSGPOP|SYSTEM
In DDE Message enter: DND,ON,"In Meeting Until &U+'60'"

Note We are using the same time parameter used for setting Net Phones DND which uses another User Defined Action that also includes &U='60' to set the time to 60 minutes from now.

The screenshot shows the 'Add/Edit Action' dialog box with the following fields:

- Name: Chat DND On
- Type: Send DDE Msg
- App Name|Topic: MSGPOP|SYSTEM
- DDE Message: DND,ON,"In Meeting Until &U+'60'"
- Run Program if Not running:
- Program EXE: (empty)

3. In Net Phone create two Personal Call Handler Rules to trigger when the DND status changes causing Chat DND to follow Net Phone's DND status. The two rules are shown below.

The screenshot shows the 'Add/Change Handler Rule' dialog box with the following configuration:

- 1. Triggering Event: (When this happens) (Refer to this Rule as...)
Change in DND status | Turn Chat DND Off
- 2. Conditions: (If these Conditions are True)
Do-Not-Disturb Change:
 - On or Off
 - Turned Off
 - Turned On
 - Turned On with Message:
Msg Begins with: (empty)
- 3. Actions: (Then take these Actions)
 - a. Immediately: Chat DND Off
 - b. After: 0 Seconds, <None>

The screenshot shows the 'Add/Change Handler Rule' dialog box with the following configuration:

- 1. Triggering Event: (When this happens) (Refer to this Rule as...)
Change in DND status | Chat DND On "IN MEETING"
- 2. Conditions: (If these Conditions are True)
Do-Not-Disturb Change:
 - On or Off
 - Turned Off
 - Turned On
 - Turned On with Message:
Msg Begins with: IN MEETING UNTIL
- 3. Actions: (Then take these Actions)
 - a. Immediately: Chat DND On
 - b. After: 0 Seconds, <None>

Command 4 – Sending a Chat/Broadcast Message

Format: ONESHOT, Ext #/"Name", Urgency, "Message", Timeout where:

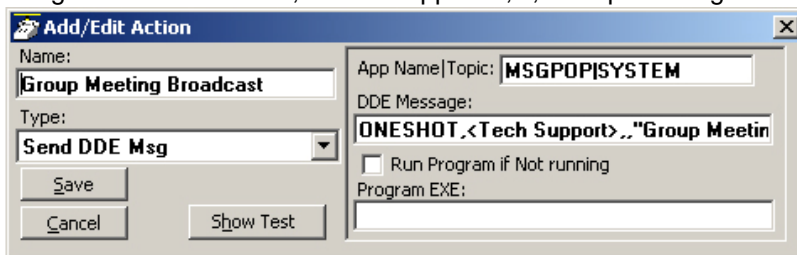
- ONESHOT = The command name.
- Ext #/"Name" = The extension number or name of the individual or group to receive the message.
Examples:
 - Ext # = 1001
 - "Name" = "Linda", "<Tech Support>" or "<<Sales>>"
 - For Everyone = "**"

Note The broadcast group names must contain the < and > or << and >> characters as part of the name.

- Urgency = enter H if urgent message and leave blank if normal message.
- "Message" = The text message to be sent.
- Timeout = The number of seconds for popup to expire. If left blank it will be set to the default of 60 seconds.

Example: The Tech Support Manager schedules Group Meetings with his staff. He wants to use Outlook to schedule the meeting and use the Outlook Reminder to send a Chat Broadcast to his group a few minutes before the meeting.

1. In Chat a Personal Group is created containing the members of <Tech Support>.
2. In Net Phone create a User Defined Action using the type Send DDE Msg and name it appropriately.
In App Name|Topic enter: MSGPOPI|SYSTEM
In DDE Message enter: ONESHOT,"<Tech Support>","H","Group Meeting at &U+'15'",60



3. In Net Phone creates a Personal Call Handler Rule to trigger when a Calendar Reminder event occurs and the Subject matches Group Meeting. This trigger will result in the action Group Meeting Broadcast to be taken. The assumption is the Outlook meeting reminder is provided 15 minutes prior to the scheduled meeting.

