

## About Ipswitch Instant Messaging

Thanks for purchasing Ipswitch Instant Messaging (Ipswitch IM). With Ipswitch IM, you have the convenience of using instant messaging in a controllable, contained, and secure communication environment.

### Product Highlights

- Ipswitch IM provides its own user management system, but it can also leverage existing Windows NT, Ipswitch IMail Server, or LDAP authentication databases.
- With version 2.06 you now have the ability to export conversations to RTF files for archive or search purposes
- Ipswitch IM integrates with Microsoft Office XP products by using Smart Tags, which are person's names or email addresses that are associated with an IM contact. Smart Tags are automatically recognized in any Office Document.
- Ipswitch IM can be configured so that message traffic never leaves your company's internal network, which greatly increases security.

#### Minimum Requirements: Server

- A static IP address
- Windows 2000 or 2003 Server
- Pentium 350 MHz or faster
- 96 MB RAM
- 100 MB hard drive space
- Network interface card (Configured to use TCP/IP for Windows NT and a dial-up or LAN TCP/IP connection.)

#### Minimum Requirements: Client

- Windows 2000, 2003, or XP
- Pentium 350 MHz or faster
- 64 MB RAM
- 10 MB hard drive space
- NIC must be installed for internal TCP/IP network and client connected to the server

## Installing the Server

Installing Ipswitch IM Server is easy and can usually be completed in less than ten minutes.

### Things to Keep in Mind

- Ipswitch IM Server must be installed locally.
- Ipswitch IM Server receives traffic on TCP Port 5177 or 5178. If you use a firewall, you may need to open these ports.
- If you use a NAT network, the installation process requires an additional step. (See NAT Router Information section on this card.)
- All instant messages are encrypted and can be optionally logged on the Ipswitch IM Server.
- The Ipswitch IM Client installer is stored in the folder where Ipswitch IM Server was installed.

### Starting the Installation Process

**Note:** To install the Ipswitch IM Server, you must be logged on to the computer with an account that has system administration rights.

- 1 Launch the Ipswitch IM Server installer. The *Welcome* screen displays. Read the text, then click **Next**.

- 2 The *Choose Destination Location* screen displays. Select or enter the destination folder. This directory must not be moved or renamed after installation. After choosing the destination location, click **Next**.
- 3 The *Select Program Folder* screen displays. Select or enter the program group. After choosing the program folder, click **Next**.
- 4 The *User Authentication Database Options* screen displays. Select Ipswitch IMail Server, Windows NT, or use the Ipswitch IM Server for user authentication and administration. To use an LDAP database, complete the install using Ipswitch IM Server database, then configure the LDAP database through the Ipswitch IM Server Manager after the install completes. Click **Next**.
 

**Note:** The Ipswitch IMail Server option is available only if Ipswitch IMail Server is installed on the local computer.
- 5 The *Start Copying Files* screen displays. To accept the current settings and continue the installation process, click **Next**.
- 6 The *Setup Complete* screen displays.
- 7 Select **Launch Messenger Server Manager now**.
- 8 To complete the setup process, click **Finish**.
- 9 The Ipswitch IM Server screen appears and offers the options to either start the server, read the Release Notes, or both.

## Creating a User Account

If you are using the Ipswitch IM user database, create a user account using the Ipswitch IM Server Manager. This account is needed to log on with the client.

**Note:** To create a user in one of the other user databases, use the tools provided with that database.

- 1 From the Ipswitch IM Server Manager, click the **Users** page. The *Users* page displays.
- 2 Click **New**. The *New User* dialog launches.
- 3 Enter **Username** and **Hostname**. Enter and confirm a new **Password**, or use the default password of *password*. Click **Next**. The *New/Edit Contact* dialog displays.
- 4 Click **Next**. The *Default User Options* dialog displays.
- 5 Click **Finish**.

**Note:** User accounts are not automatically added to the Public Contacts List. See the Ipswitch IM Server online help topic *Public Contacts List* for more information.

## Installing the IM Client

The client installer is located in the folder where Ipswitch IM Server was installed.

**Note:** Before you install the Ipswitch IM client, create a user account.

### The Installation Process

**Note:** To install the Ipswitch IM Client, you must be logged on to the computer with an account that has system administration rights.

- 1 Launch the Ipswitch IM Client installer. The installation process begins and the *Welcome* screen displays. Read the text, then click **Next**.
- 2 The *Choose Destination Location* screen displays. Select or enter the destination folder. Click **Next**.
- 3 The *Select Program Folder* screen displays. Select or enter the program group. Click **Next**.
- 4 The *Start Copying Files* screen displays. To accept the current settings and to continue with the installation process, click **Next**.
- 5 The *Setup Complete* screen displays. To complete the installation process, click **Finish**. Ipswitch IM Client launches and the *Logon* dialog displays.

- 6 Enter **Account Name** and **Password**, then click **OK**. The Ipswitch Instant Messaging client connects to the server.

## NAT Router Information

The following sections describe two areas of critical interest to the NAT user: running the Ipswitch IM Server behind NAT and running the Ipswitch IM Client behind NAT.

### Ipswitch IM Server is behind NAT

If your IM Server is running behind NAT, keep the following requirements in mind:

- The NAT device must forward all traffic for port 5177 to the Ipswitch IM Server. This can be accomplished by putting the Ipswitch IM Server inside the DMZ of the NAT device or by port mapping.
- When accounts are created in the Ipswitch IM Server Manager, the user account name must reflect the public host name. The account used by clients to log on must resolve to the Ipswitch Instant Messaging Server.

For example: If the host name of the NAT device, according to DNS, is *IM.YourCompany.com*, then the user's account would be:

`userid@IM.YourCompany.com`

### Ipswitch IM Client is behind NAT

If your IM Client is running behind a NAT router, the following client setup change is necessary:

- 1 From the Ipswitch IM Client toolbar, click **View**.
- 2 Click **Options**.
- 3 In the Categories column, click **Logon**. The *Logon Options* page displays.
- 4 Select **Use persistent data connection**.
- 5 Click **OK**.

## Further Information

Find more information about Ipswitch IM in the online Ipswitch IM Server User's Guide. Or, for technical support, contact us online at <http://support.ipswitch.com>.

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