# IPSWITCH
# Instant Messaging™

## Getting Started Guide

## Copyrights

## Update History

April 2011          Ipswitch Instant Messaging v2.0.8

# CHAPTER 1    Getting Started with Ipswitch Instant Messaging

# CHAPTER 2    Configuring the Server

# CHAPTER 3    Getting New Users Started

# Getting Started with Ipswitch Instant Messaging

## In This Chapter

## About Ipswitch

A successful technology leader creating value-added Windows-based software solutions since 1991. At Ipswitch, we take what's possible and make it practical and affordable.

### Corporate Headquarters

You can receive *more information http://www.imailserver.com* by contacting our corporate offices or by visiting us at our Internet site. Standard contact and Internet address information is provided below:

| Address: | Ipswitch, Inc.<br>753 Broad Street, Suite 200<br>Augusta, GA 30901<br>USA |
|---|---|
| **Sales:** | 1-706-312-3540 |
| **Fax:** | 1-706-312-0899 |
| **Technical Support:** | 1-706-312-3500 |
| **Internet:** | *www.imailserver.com http://www.imailserver.com* |

# Server and Client Requirements

**Minimum System Requirements for IIM Server**

- Windows 2003 Server, Windows 2008 Server
- Intel Pentium® 4, 1GHz or higher or an equivalent processor
- 512+ MB of RAM (2 GB recommended)
- 300 MB of hard disk space (1 GB recommended)
- 1 NIC running TCP/IP with a static IP address

**Minimum System Requirements for IIM Client**

- Windows XP or higher
- Intel Pentium® 4, 1GHz or higher or an equivalent processor
- 256 MB of RAM
- 10 MB or hard disk space

**Things to Keep in Mind**

- 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)
- The Ipswitch IM Client installer is located under the same folder as the Ipswitch IM Server. "`..//Program Files/Ipswitch/IMail/IM Server`"

# Configuring the Server

## In This Chapter

Ipswitch Instant Messaging Server can be configured to use several user database formats

- **Ipswitch Instant Messaging** - This integrated database is used by default.   Users are managed using the Users pane of the Ipswitch Instant Messaging Server Manager.

- **Ipswitch IMail Server** - If Ipswitch IMail Server is located on the same server as Ipswitch Instant Messaging Server, then Ipswitch Instant Messaging Server can use the same user database as Ipswitch IMail Server.

- **Windows NT** - Ipswitch Instant Messaging Server can utilize the user database from a Windows 2003, 2008 or XP domain.

- **LDAP** - Ipswitch Instant Messaging Server can use any LDAP-compliant user database.

If you are using a NAT router, you must also configure Ipswitch Instant Messaging Server to work behind the NAT.

# Using LDAP to Access an Existing User Database

Ipswitch Instant Messaging (IIM) can leverage an existing LDAP user database to authenticate Ipswitch IM users.   This will prevent you from having to enter and maintain user data in multiple locations.

# To use an existing LDAP database for user authentication:

> **Note:** Configure Ipswitch IM to access an LDAP user database requires specific connection information about the LDAP server.   If you do not know this information, contact the LDAP server administrator.

1   Open Ipswitch IM Server Manager by selecting **Start > Programs > Ipswitch IM Server > Ipswitch IM Server Manager**.
2   Select the **General** category.
3   Select **LDAP** from **Authentication Database**, then click **Configure**. The LDAP Configuration dialog appears.
4   In **Server Name**, enter the hostname of your LDAP server.
5   In **Port Number**, enter the number of the port your LDAP server monitors for queries.   For most LDAP configurations, the default value of 389 will work.
6   Click **Use SSL** if you want LDAP queries to be encrypted using Secure Sockets Layer.   Your LDAP server must be configured to accept SSL connections for this option to work.
7   In **User Authorize DN**, enter the portion of the LDAP schema to use for user authentication.
8   In **User Search DN**, enter the portion of the LDAP schema to use as a root for finding users.
9   In **User Search Filter (All Users)**, enter the search string to use to return all users.
10  In **User Search Filter (Single User)**, enter the search string to use to return one specific user.
11  In the **Remote Import List Context** section, enter a **Username** and **Password** of any user in the LDAP database.   This information will be used to authenticate any requests by remote servers to import the local user database.
12  Click **Test**. The LDAP Test Account dialog appears.
13  Enter the **Account Name** and **Password** of any user on the LDAP server, then click **OK**.   The results of the test are displayed.
14  Make any necessary corrections to the configuration information, then click **Test** again. If your test completed without errors, click **OK** to save the configuration and exit the LDAP Configuration dialog.

# Sample Configurations

## Microsoft LDAP/Active Directory Server Sample Configuration

- **Server Name**
  ldapserver.ipswitch.com
- **Port number**
  389
- **User Authorize DN**
  sAMAccountName=%s,CN=Users,DC=ipswitch,DC=com
- **User Search DN**
  CN=Users,DC=ipswitch,DC=com
- **User Search Filter (All Users)**
  (&(|(objectClass=user)(objectClass=person))(!description=built-in*))
- **LDAP User Search Filter (Single User)**
  (&(|(objectClass=user)(objectClass=person))(!description=built-in*))(sAMAccountNam
  e=%s))

## Ipswitch IMail Server LDAP Sample Configuration

- **Server Name**
  imailserver.ipswitch.com
- **Port number**
  389
- **User Authorize DN**
  uid=%s,ou=People,o=imailserver.ipswitch.com
- **User Search DN**
  ou=People,o=imailserver.ipswitch.com
- **User Search Filter (All Users)**
  (|(objectClass=user)(objectClass=person))
- **LDAP User Search Filter (Single User)**
  (&(|(objectClass=user)(objectClass=person))(uid=%s))

# Using LDAP with Non-standard Mappings

If your user database contains unusual or non-standard field names, you can still use the
database to authenticate Ipswitch IM users by modifying the Ipswitch IM Server mapping
data in the Windows registry.

> **Note: Changing the standard field mappings requires editing the Windows
> registry. You should always back-up your registry before modifying it directly.**

To modify the mapping data:

**1**    Open the windows Registry Editor by selecting **Start > Run** and entering regedit.   Click **OK**.

**2**    Navigate to HKEY_LOCAL_MACHINE\SOFTWARE\Ipswitch\Messenger Server\Settings\LDAP.

**3**    Modify the registry strings to match your configuration, then exit the Registry Editor.

The keys that can be modified include:

- **LDAP Mapping (DisplayName)** is the name of the LDAP attribute you want to map to the DisplayName attribute in Ipswitch IM.   If you are using Ipswitch IMail Server LDAP, change this value to CN.

- **LDAP Mapping (EMAIL)** is the name of the LDAP attribute you want to map to the Email attribute in Ipswitch IM.

- **LDAP Mapping (Username)** is the name of the LDAP attribute you want to map to the Username attribute in Ipswitch IM.

- For using Ipswitch IMail Server LDAP, change this value to `UID`.

- For using Active Directory, change this value to `sAMAccountName`.

- **LDAP Mapping (WebSite)** is the name of the LDAP attribute you want to map to the WebSite attribute in Ipswitch IM.

Other registry keys are more easily modified through the LDAP Configuration dialog (accessible by clicking the **Configure** button on the Ipswitch IM Server Manager's **General** category).

# Using a Windows NT User Database

Ipswitch Instant Messaging (IIM) can leverage the user information from Windows XP, Windows 2003 and Windows 2008 to authenticate Ipswitch IM users.   This will prevent you from having to enter and maintain user data in multiple locations.

# To use an existing Windows NT user database for user authentication:

1   Open Ipswitch IM Server Manager by selecting **Start > Programs > Ipswitch IM Server > Ipswitch IM Server Manager**.

2   Select the **General** category.

3   Select **Windows NT** from **Authentication Database**, then click **Configure**. The NT User Database Configuration dialog appears.

4   If you want to use the user database from the local machine, leave both fields blank.

> **Note**: Since Windows XP cannot be used to establish a domain, Ipswitch IM can import Windows XP user information from the local machine only.

To use the database from another server, enter the domain name of your Primary Domain Controller (or Active Directory Server for Windows 2003/2008) in **NT Domain Name.**   In **Machine name of Domain Controller**, enter the hostname of the physical server.

5   Select **Show NT Groups** to group users in the public contact list using the Windows NT user groups.

# Using an Ipswitch IMail Server User Database

Ipswitch Instant Messaging (IIM) can leverage an existing Ipswitch IMail user database to authenticate IIM users. This will prevent you from having to enter and maintain user data in multiple locations.

> **Note**: In order to use an Ipswitch IMail Server user database for user authentication, Ipswitch Messaging Server must be installed on the same server as Ipswitch IMail Server.

# To use an Ipswitch IMail Server database for user authentication:

1   Open Ipswitch IM Server Manager by selecting **Start > Programs > Ipswitch IM Server > Ipswitch IM Server Manager**.

2   Select the **General** category.

3   Select **IMail** from **Authentication Database**, then click **Configure**. The IMail User Database Configuration dialog appears.

4   Select an **Official Hostname** from the list.

   ▪   To use this hostname's user database, click **OK**.

   ▪   To specify an alias for the hostname, click **Edit**. The Enter IMail Host Alias dialog appears.   In **IMail Alias Hostname**, type or select the name of the alias you want to use.   If you do not wish to use an IMail Alias Hostname, leave this field blank.   Click **OK** to save changes and exit the Enter IMail Host Alias dialog.

5   Click **OK**.

# NAT Router Information

When running the system behind a NAT router, special attention must be paid to setting up your Ipswitch Instant Messaging Server or Client. The following sections describe two areas of critical interest to the NAT user: running the IM Server behind NAT and running the IM Client behind NAT.

# What to know when the IM Server is behind NAT

If your Ipswitch Instant Messaging Server is behind a NAT router, the following setup changes are necessary:

**1**    The NAT device must forward all traffic for port 5177 to the Ipswitch Instant Messaging Server. This can be accomplished by putting the IM Server inside the DMZ (The area where both the internal and external networks have access) of the NAT device or by port mapping.

**2**    When accounts are created in the 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.
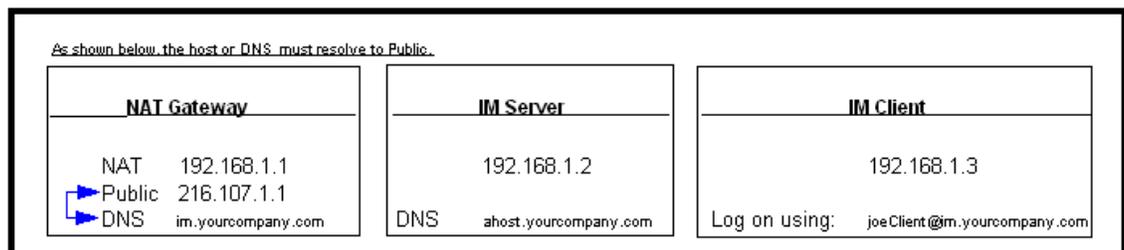


## What to know when the IM Client is behind NAT

If your Ipswitch Instant Messaging Client is behind a NAT router, the following client setup change is necessary:

**1**    From the Ipswitch IM Client's 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**.

# Client Update URL/Path

This path must either be a full UNC path or URL.

Universal Naming Convention (UNC) is a way to identify a shared file in a computer without having to identify the storage device it's on.

**Examples**

**1**   http://www.somehost.com/imclient.exe

**2**   ftp://ftp.somehost.com/imclient.exe

**3**   file://{x}:\imclient.exe (where {x} is a network drive)

**4**   \\servername\sharename\imclient.exe

# Client Logon (Options)

The Logon (options) page allows you to make selections that can simplify the logon process.

- **Automatically Log On**, when checked, causes Ipswitch Instant Messaging (IIM) to skip the Log on process and launch itself directly to the Main Window.

To take advantage of this feature, you must select the Remember my Password option and type your Password in the password text box.

- **Remember My Password**, when checked, speeds up the logon process.

This selection causes Ipswitch Instant Messaging to save your password and, during the Logging on process, automatically display it in the appropriate text or list boxes.

To take advantage of this feature, you must type your password into the **Password** text box.

- **The Log On Invisible** option, when checked, allows you to log on to the IM network without appearing to be online.
  In other words, selecting the invisible status causes your Online Status; at least as it appears to other users, to indicate you are not logged on.

- **Change Password**, when selected, causes the system to display the Change Password dialog.

- **OK** is clicked to accept your selections and changes.

- **Cancel** closes the dialog with out saving any changes.

# Getting New Users Started

## In This Chapter

## Setting Up a User Account

A new user must have a user account on the server before he can use Ipswitch Instant Messaging (IIM).   The account creation process varies depending on which user authentication database you have selected.

- Ipswitch Instant Messaging - Create new user accounts using the Users panes of Ipswitch Instant Messaging Server Manager.

- Ipswitch IMail Server - Create new users according to the steps described in your Ipswitch IMail Server documentation.

- Windows NT - New users created Windows NT will also be available to Ipswitch Instant Messaging.

- LDAP - New users created through whatever database you use LDAP to access will also be available to Ipswitch Instant Messaging.

# Managing Your Users

If you have elected to use Ipswitch IM Server's integrated user management system, you can manage your users using the Users page in the Ipswitch IM Server Manager.

> **Note**: This topic explains how to manage users using the integrated Ipswitch Instant Messaging user database only.   If you are using Ipswitch IMail Server, LDAP or Windows NT authorization, you should consult the documentation for those tools for directions on how to manage your users.

**To Add a User**

1   Click **New.** The New User dialog appears.
2   Enter the user's account information in **Username** and **Hostname.**
3   Enter a password in the **Password** text box and again in **Confirm Password**.

> **Note**: Ipswitch Instant Messaging's default user password is "password."

4   Select **Add to Public Contact List** if you wish to add this user to the Public Contacts List. You can manually add or remove any user from the Public Contacts page at any time.
5   Click **Next**.
6   Type a name in the **Display Name (Optional)** text box. This name will be displayed in your list of users.   If no name is provided, your Username will be displayed to others instead.
7   You may also enter additional **Contact Properties**, such as e-mail or Web site address.

   **To Create Additional Contact Properties:**

   a)   Click **New**. The Property dialog appears.

   b)   In **Property name**, enter the name of the item you want to associate with the user.   To share the user's cell phone number, for example, enter "Cell Phone."

   c)   In **Property value**, enter the specific details about the property name. If the property value is "Cell Phone," the property value would be the cell phone number.

> **Note**: Ipswitch Instant Messaging includes support for two special properties.   If you enter "Email" or "Web Site" as the property value, the items will be accessible for quick access (composing an email and browsing the Web site, respectively) by right-clicking on the contact in the contact list in the Ipswitch Instant Messaging client.

   d)   Click **OK** to save the property.
8   Click **Next**.
9   To accept the default user options specified in Default User Options , click **Finish**. You can also select **Override default user options** to specify different user options for this user.

You can specify the following options:

- Maximum message size _____ bytes allows you to limit the maximum size (including attachments) of a single message. While for all intents and purposes the message size is unlimited, there is however a physical system limit of 2,147,483,647 bytes (2 Gigabytes). If a user sends a message that exceeds the set limit, he or she will receive the following warning: **Message size exceeds maximum allowed by this server (.... bytes).**

- Maximum Allowed Conversation Users puts a limit on the number of users with whom this user can participate in a conversation.   To allow an unlimited number of users in a conversation, set this value to -1.

- Maximum Allowed Conversations   sets a limit on the number of active conversation windows the user can have open at any given time.   To allow this user to participate in an unlimited number of conversations, set this value to -1.

- Block Clients from Sending Attachments prevents this user from attaching or including files in conversations.

- Force Clients to Use Persistent Network Connections is selected to force this user's client to keep a persistent connect to the Ipswitch Instant Messaging Server.

- Block client from sending instant messages is selected to prevent this user from sending messages.   When this option is selected, the user will be able to receive messages, but not send them.

- Allow clients access to conversation logs is selected to allow this user to access stored conversations in which she participated from the Conversation Store on the server.   For this option to work, the server must be set to store conversations on the General Options page.

**To Edit a User's Information:**

1   From the Users page, select a user and click **Edit.** The Edit User dialog appears.
2   Modify the account and password information as necessary, then click **Next**.
3   Create new contact properties by clicking **New.** To modify an existing contact property, select it from the list and click **Edit**.   When you are finished, click **Next**.
4   Choose whether or not to apply the default user options to this user by selecting or clearing **Override default user options.**   If you are overriding the default user options, modify the other fields as necessary, then click **Finish**.

# Installing the Client

During the server's installation, the Ipswitch Instant Messaging (IIM Client) executable file was copied into the Ipswitch Instant Messaging Server's root folder. The client portion of the Ipswitch's Instant Messaging network can be installed from CD or downloaded from a central network location.

# Preparing for Client Installation

> **Note**: The client installer is stored in the Ipswitch Instant Messaging Server's root folder.

1    Create a user account name and password. (Or, ensure a user ID has been created or you've pointed to another user authentication database.)
2    Determine how you will handle the installation.

- **E-mail**

    Send the user his or her logon ID (account name) and password information, and tell him or her from where and how to download and install the application.

- **From the user's workstation**

    Install from a central network location or from the CD. Supply the user with his or her logon ID (Account Name) and password.

# Standard Client Installation

> **Note**: The following instructions are suitable for client-user distribution and may be used by your users to install the Ipswitch Instant Messaging Client.

**To install the client, complete the following steps**:

1    Launch the **IMclient** executable file. The installation process begins.
2    The Welcome screen displays. After reading the text, click **Next**.
3    The Choose Destination Location screen appears.   Select the folder where you would like to install the program, then click **Next**.
4    The Select Program Folder screen appears. Select the program group where you would like the program's icon to be located in the Start Menu.   You may also enter text to create a new group.   Click **Next**.
5    The Start Copying Files screen displays.   To accept the current settings and continue with the installation process, click **Next**.
6    The Setup Complete screen displays. To complete the installation process, click **Finish**.
7    The Ipswitch Instant Messaging client is now installed.

# Alternate Silent Installation

You may, if you choose to take advantage of an available silent installation process, automate the execution of the IM Client installation by creating a batch installation file. This process installs the IM Client set-up without end-user input.

To install the client using silent installation, complete the following process.

**1**  The IM Client will be installed to the default locations:

**Target Directory**

Folder: C:\Program Files\Ipswitch\IM Client

**Program Folder**

Folder: Start > Programs > Ipswitch IM

**2**  Run the IM Client install with no user input:

This example assumes you have a shared network drive I.

In this example the client install is named: `imclient.exe`
From a DOS prompt, launch the IIM Client executable:
`I:\imclient.exe -s`