

Using Unified Communications V8.5.x CHAT from Lotus Notes Client

IBM Sametime is bundled with Notes/Domino to enable you to check the availability of a contact or co-worker, or to communicate with them when using your lotus notes client.

This document covers Sametime versions 8.5.x. Please see Using Unified Communications V9.x CHAT from Lotus Notes Client if you have Sametime V9 software.

- Notes V9.0.1 includes Sametime 8.5.2 IFR1
- Notes V8.5.3 includes Sametime 8.5.1
- Notes V8.5.2 and below includes Sametime 8.0.2

Community Status
Your availability status shows here. Click the arrow to change your status, wording or privacy list.

Icons
Use action bar icons to perform tasks. Hover your mouse over an icon to show the function. Any grayed out tasks are not available.

Search
Type a name here to quickly find someone to chat with or call

Availability Status
The availability status for shows presence information for each contact.

Business Card
Hover your mouse over a name to show the business card for that contact.

Geographic Location
Shows others were you are. Click to update your location information.



Options Menu
Right click on a name to display an options menu as shown below.

The screenshot shows the 'Sametime Contacts - IBM Lotus Notes' window. The title bar includes 'All' and 'Erie 1 BOCES WNYRIC Service Center'. The main area displays a list of contacts grouped by location: caboces (9), E1B TSMgtTeamPlus (42), fillmore (13), onboces (47), portville (2), and Work (17/22). The 'Work' group is expanded, showing a list of names with status icons. A business card for Jill Holbrook is displayed over the list, showing her name, title (Associate Director, Erie 1 BOCES), phone number (716) 821-7220, and email JHolbrook@e1b.org. An options menu is open over the name 'Jill Holbrook', listing actions such as Chat, Video Call, Call, Invite to Instant Meeting Room..., Instant Meeting, Available Tools..., Send, Alert Me When Available, Alert Me When..., Remove Alerts, Privacy Lists..., Refresh Person Info, Edit Nickname..., Business Card, Remove from Sametime Contact List, Chat History, Collaboration History, Find Available Time..., Add to Primary Contacts, and Search.

Task Reference

Read this section to get started with the Sametime tasks. Some options may be unavailable for users with limited entitlement.

Table 1. Getting started tasks

How do I...?	Lotus Notes Client
Log in for the first time?	Click File -> Sametime -> Log In To Sametime and select the server community in which to log in.
Save, print, or send a screen capture of a portion of my screen?	Click  in the message entry area of a chat window or at the top of your Sametime Contacts list.
Change my availability status for a specific server community?	Click the availability status icon for a community at the top of Sametime Contacts, such as  , and then select a status.
Change my availability status for all my server communities?	Click All at the top of your Sametime Contacts list and then select a status.
Automatically change my availability status to another status in certain situations, such as when I do not touch my keyboard for a certain amount of time?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Auto-Status changes .
Set who sees my name on their contact list when I am online. (Privacy List)?	Click Tools -> Sametime -> Privacy and then click the When I am online tab. Select Enable this list to control who can see you when you're online and add names to include or exclude from this privacy list.
Set who can see my name on their contact list when my availability status is "Do Not Disturb." (Privacy List)?	Click Tools -> Sametime -> Privacy and then click the When I am on Do Not Disturb tab. Select Enable the following people to see me as Available even when my status is set to Do Not Disturb and add names to include or exclude from this privacy list.
Work with my server communities, for example, remove or set preferences?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Server Communities .
Set or update my geographic location so others know where I am and how to contact me?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Geographic Location .
Set how I want to be notified of a variety of events, such as when I receive a call, an invitation, or a chat?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Notifications .

Contacts

Read this section to get started with the Sametime contacts. Some options may be unavailable for users with limited entitlement.

Table 2. Contact tasks

How do I...?	Lotus Notes Client
Add contacts to my contact list?	Click File -> New -> Sametime Contact .
Create nicknames for contacts on my contact list? Note: Nicknames display only on your own computer, wherever a name appears, such as on your contact list or in a chat window. Other people cannot see the nicknames you create.	Click a Sametime contact and then click Edit -> Sametime -> Edit Nickname
Move a contact on my contact list? Note: You cannot move contacts within or between public groups	Click and drag a Sametime contact's name to move it within or between personal groups.
Reduce the number of contacts on my contact list by removing specific contacts or those with whom I rarely or never chat?	Click in your Sametime contacts and then click Tools -> Sametime -> Clean Contact List .
Alphabetically sort the contact names on my contact list?	Click in your Sametime contacts and then click View -> Sametime -> Contacts Alphabetically .
Display only online contacts or both online and offline contacts on my contact list?	Click in your Sametime contacts and then click View -> Sametime -> Online Only . Clear this setting to show all contacts.
Add a personal or public group to my contact list?	Click File -> New -> Sametime Group and select Add a new personal group or Search for a public group to find a public group to add.
Edit the name of a personal group on my contact list. Note: You cannot edit the names of public groups.	Click the name of a personal group on your Sametime contact list and then click Edit -> Sametime -> Rename Group .
Show both online and offline members of the public groups on my contact list.	Click the name of the public group whose members you want to display and then click View -> Sametime -> Group Contents .
Alphabetically sort the group names on my contact list.	Click View -> Sametime -> Groups Alphabetically .
Work with my contact list, such as to set preferences for your Sametime contact list window and other display options.	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator and then click Contact List .
Send an announcement, file, or email to one or more contacts on my contact list?	Click the names of one or more contacts and then click Tools -> Sametime>Send, Announcement, File or Email
Set a one-time alert so that I am notified when a contact comes online and is available.	Click a contact's name and then click Tools -> Sametime -> Alerts -> Alert me when available .
Set other alerts for individual contacts?	Click one or more contacts' names with an alert and then click Tools -> Sametime -> Alerts -> Alert Me When .
Get alerted whenever I start a chat or other events with groups larger than a specified number of people?	Click File -> Preferences and then click the plus sign (+) in beside Sametime in the navigator. Then click Contact List . Select Confirm when I start events with groups larger than this number of people and choose the number of people.

Text chats

Read this section to get started with Sametime chat. Some options may be unavailable for users with limited entitlement.

Table 3. Text chat tasks

How do I...?	Using Lotus Notes
Start a text chat with someone on my contact list?	Double-click a contact's name
Start a text chat with someone not on my contact list?	In the Search field at the top of your Sametime Contacts, type the name of the person with whom you want to chat, and then click it.
Invite others to a chat?	In an open chat window, click Tools -> Invite Others
Specify how to alert me when I get a new chat?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Notifications .
Manually check the spelling of my text?	In an open chat window, click Tools -> Check spelling .
Automatically check the spelling of my text?	In an open chat window, click Tools -> Check Spelling Automatically .
Insert an emoticon into my text?	In an open chat window, click Tools -> Insert -> Emoticons .
Work with emoticon palettes, such as edit an emoticon or create a custom emoticon palette?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Emoticon palettes .
Insert a web address into my text?	In an open chat window, click Tools -> Insert -> Hyperlink .
Insert a Lotus Notes link into my text?	After copying a Lotus Notes link, in the chat window, click Tools -> Insert -> Hyperlink
Send an annotated screen capture of a portion of my screen to my chat partner?	In an open chat window, click Tools -> Insert -> Screen capture .
Send a file to my chat partner?	In an open chat window, click Tools -> Send -> File .
Send the chat transcript in my open chat window as an email?	In an open chat window, click Tools -> Send -> As E-Mail .
Prevent my chat partners from saving, copying, or printing a chat transcript?	In an open chat window, click Tools -> Prevent Transcript Save .
Set display and other settings for my text chats?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Chat Window .
Set if and how to save all of my chat transcripts, by default?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Chat History .
Manually save the transcript in my active chat window to a file? Note: You cannot view or work with manually saved chat transcripts in the chat history viewer.	In an open chat window, click File -> Save Chat As .
Automatically save all my chat transcripts? Note: Only automatically saved chat transcripts are available in the chat history viewer.	In an open chat window, click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Chat History
View and work with my automatically saved chat transcripts in the chat history viewer? Note: Only automatically saved chat transcripts are available in the chat history viewer.	In an open chat window, click File -> Open Chat History to open the chat history. Then click File or Tools to select an action to carry out.
Display multiple chat windows in a single, consolidated, tabbed window?	Click File -> Preferences and then click the plus sign (+) beside Sametime in the navigator. Then click Chat Window .
Display or hide elements of my open chat window, such as the action bar or business card?	In an open chat window, click View -> Sametime -> Show and select the elements you want to show.