



**Version 3.3**

# **User's Guide**

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## Release Notes

### Release 3.3

RELEASE 3.3.120307

- Licensing enhancement for simple enterprise deployment.

RELEASE 3.3.120227

- Updated for JBuddy Server v3.3 in support of enhanced security for authentication using Active Directory, LDAP, and Mac OS X Open Directory.
- Updated for JBuddy Server v3.3 in support of Add Buddy searches against Active Directory, LDAP, Mac OS X Open Directory, and JBuddy Server local accounts.
- Fix to buddy display names - use server-stored buddy display name unless specifically overridden by user.
- Updated Lotus Sametime Connect library in support of Lotus Sametime Server 8.5.x.
- Updated Lotus Sametime default server to sametime.lotus.com.

### Prior Releases

Please refer to <http://www.zionsoftware.com/support/messenger/docs/ReleaseNotes.html> for the complete release notes of JBuddy Messenger.

## Introduction

### Intended Audience

Welcome to the JBuddy Messenger User's Guide. This guide is intended primarily for two types of readers:

- End Users
- IT Support Staff

End Users are the users who will launch and use JBuddy Messenger as part of their typical work day. IT Support Staff are responsible for end-user support for JBuddy Messenger within the business environment.

### Terms

First a clarification on terms is in order. The JBuddy Messenger IM Client is also known simply as 'JBM' for brevity. The JBuddy Message Server is also known as 'JBuddy Server.' When the term 'Directory' is used in this document, it means Active Directory, Mac OS X Open Directory, or another LDAP-compatible corporate directory where user account credentials are stored.

### Evaluation / Free License vs. Enterprise Licensed

This guide describes the JBuddy Messenger IM Client (JBM) available from Zion Software. As of this writing, JBM is available as a download from <http://www.zionsoftware.com/products/>

[messenger/](#). A free evaluation license for JBM is included but a free 30-day enterprise evaluation license is also available at:

<http://www.zionsoftware.com/products/messenger/request-eval.shtml>

Expect where specified, this guide uses screen shots from a Mac OS X version of JBM and assumes JBM is using the enterprise license. A comparison of the evaluation / free JBM license vs. the enterprise license is described online at: <http://www.zionsoftware.com/products/messenger/license-comparison.shtml>

## Installation

Before downloading JBM from Zion Software's website, be sure you have the latest version of Java installed on your desktop. Java is available as a free download from <http://www.java.com/>. JBM requires at least Java 1.4+ but Zion Software recommends Java 6 or newer. Assuming Java is installed properly, you can simply download the JBuddy Messenger archive appropriate for your operating system (Mac OS X, Windows, or Linux / Unix). Next, extract the JBuddy Messenger application from the downloaded archive and simply **copy or move JBM to a location on your computer where you typically store applications**.

Until JBM is licensed, end-users will see a window during startup explaining the benefits of purchasing an enterprise license. See Figure 1.

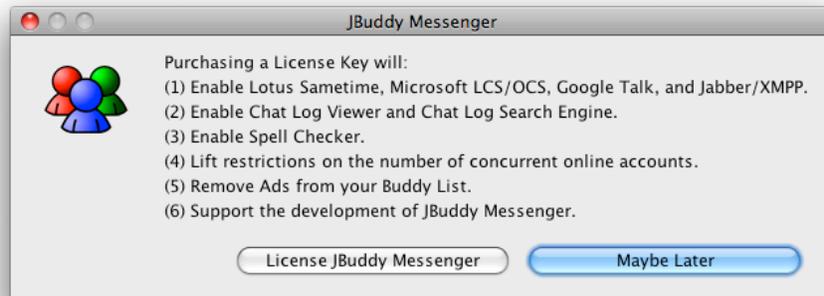


Figure 1: License Reminder (evaluation / free license)

If JBM is already licensed, the window shown in Figure 1 will not appear. If the end-user clicks the 'License JBuddy Messenger' button, they will be prompted to accept the JBuddy Messenger end-user license. See Figure 2.



Figure 2: License Agreement

If the end-user clicks 'Accept', the License Installation window will appear similar to Figure 3.



Figure 3: License Installation

## Account Creation

Once JBM is installed, you will be prompted to create a new IM account. This step doesn't actually provision a new IM account on an IM server, but instead allows the user to specify the login credentials and server configuration necessary to sign on to the server.

### JBuddy Server Accounts

In order to login to the JBuddy Server, the JBM user must already have an account on JBuddy Server or the user must have Directory login account and JBuddy Server must be configured to support Directory authentication using the JBuddy LDAP Gateway. The end-user will need to click New Account (JBuddy Server) (Figure 4).



Figure 4: New Account Selection (JBuddy Server)

Next, the end-user will specify the Name and Password as illustrated in Figure 5. If  Save password is not checked, the first time the end-user attempts to connect the IM Account after launching JBM, they will be prompted to provide the password. While JBM is running the password will remain in memory and be used for subsequent reconnects. If the end-user quits JBM, the next launch of JBM will require the password again. **Also Note:** If  Save password is not checked, the  Automatically connect on Messenger startup option will be disabled.



Figure 5: New Account (JBuddy Server)

## DNS SRV Compatible Names

The JBuddy Server administrator or IT Support Staff should inform the end-user of the Name to use in order to authenticate. If JBuddy Server is configured to authenticate with the corporate directory, the end-user will provide the same username and password used to login to the computer. For a Windows Server 2003 or 2008 environment, the Name would typically take the form of username@domain. The System Administrator should also configure a DNS SRV record to simplify end-user configuration on the Connection tab. Consult the JBuddy Message Server User's Guide for DNS SRV configuration information.

If a DNS SRV record is **not configured** or if the Name is not in the recommended form username@domain, the end-user will need to click the Connection tab, uncheck the **Use default**

**server** and change the **Server Address:** host field to the hostname or IP address where the JBuddy Server is running (Figure 6).

## Security

If passwords are used for authentication with an LDAP or Active Directory, they are encrypted between JBuddy Messenger and JBuddy Server regardless of the use of SSL/TLS. If the Sys Admin has enabled TLS/SSL (secure login) on JBuddy Server, only SSL/TLS connections will be allowed from JBuddy-enabled IM Clients. NOTE: The **[X] Secure this connect** is checked by default so it must be unchecked if JBuddy Server is not configured for SSL/TLS connections. If JBuddy Server is using a self-signed SSL certificate to encrypt the connection, the **[ ] Allow self-sigend certificates** checkbox must be checked as well.

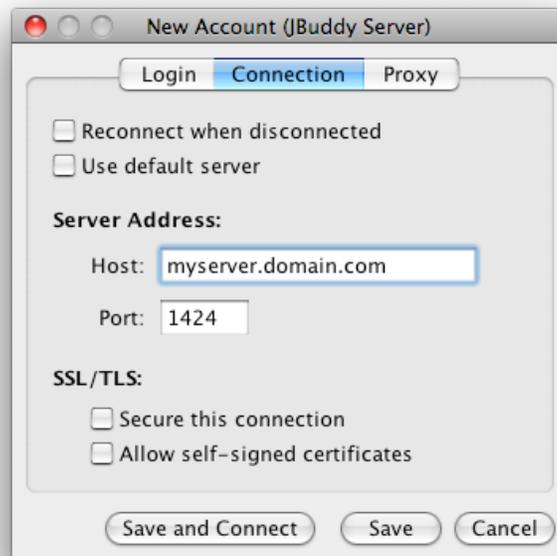


Figure 6: JBuddy Server Connection (non-secure, no DNS SRV)

## Buddy List

Once that is specified, the JBM user can click **Save and Connect** and if everything has been specified correctly, the JBM user should connect and see a blank buddy list window (see Figure 7A).

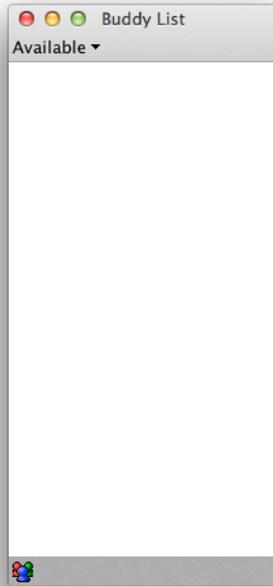


Figure 7A: Connected user, Empty Buddy List

At this point, right click on the blank area or the protocol icon at the bottom left of the buddy list and click add "buddies" to the "buddy list" (see Figure 7B).

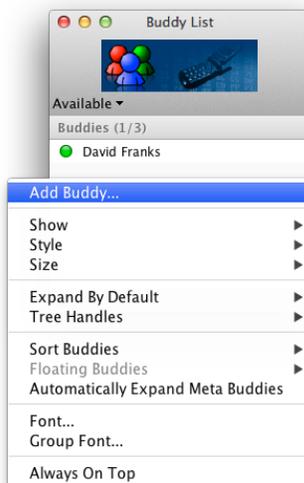


Figure 7B: Connected User, Add Buddy Menu



Figure 7C: Add Buddy Wizard (initial)

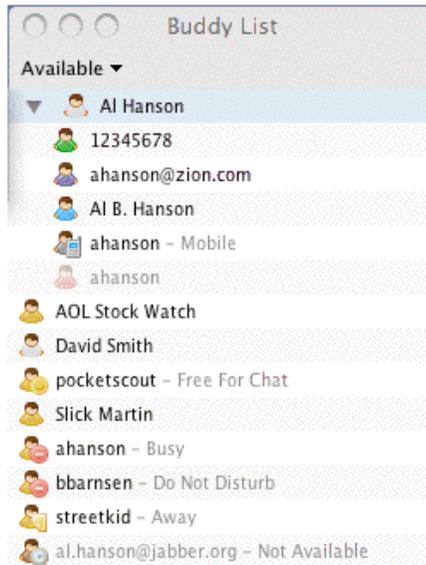
An 'Add Buddy Wizard' window will appear (see Figure 7C) and allow the user to send a search phrase, specify a name for the buddy group to add the new buddy to and possibly override the display name stored on the server with the user's own nick name for the user. The search phrase can be one or two words separated by a space. If one word is entered, add buddy will search for a user with a matching first or last name. If two words are entered, add buddy will search for a user with a matching first and last name. Wildcard (\*) searches are permitted as long as at least one word is also provided in the add buddy search field. For example, to search for all users with a first name beginning with Ste, Steve\* should be entered. This will match users with a first **or last** name of Steve, Steven, Stephen, Stephanie, etc. To search for a user with a last name of Smith, you could simply enter Smith as a search name which would return all users with a first or last name of Smith, or you could provide a first name initial with wild card such as S\* Smith which would return all users with a first name beginning with S and a last name of Smith. A list of users matching the search will be returned after a few moments (see Figure 7D) or a messaging indicating no matches were found will appear.



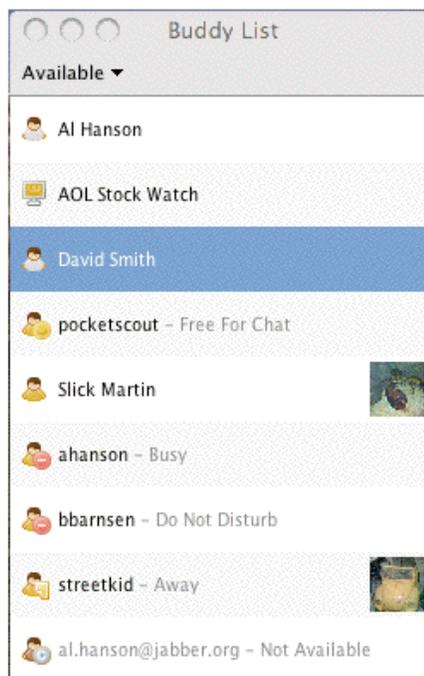
Figure 7D: Add Buddy Wizard (Multiple Search Matches)

## Buddy List Styles

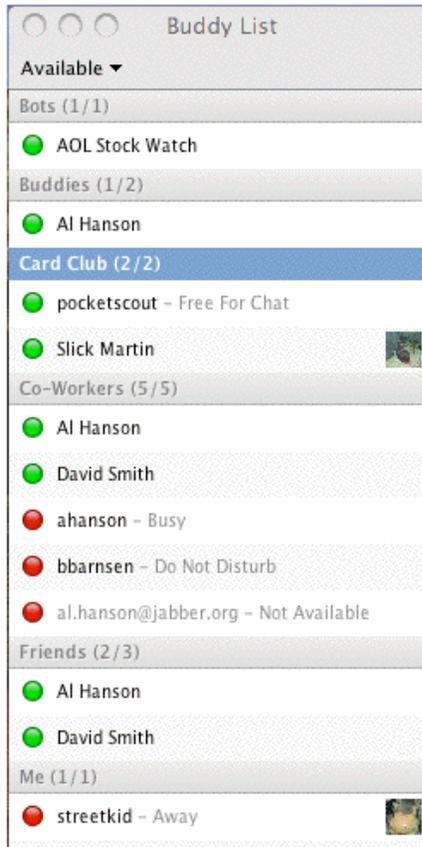
JBM has very flexible and powerful Buddy List styles which can be configured through the Buddy List menu. Examples of Buddy List styles are shown in Figure 8.



Silk Style, Size Small, Meta Buddy



Silk Style, Size Large



Cupertino Style with Groups

Figure 8: Buddy List Styles (Mac OS X)

## Compound Buddies

JBuddy Messenger also supports ‘compound Buddies.’ If you know someone who uses more than one IM network and you are signed onto multiple IM Accounts, the friend may appear multiple times (once for each IM network). If you drag the Buddy representation onto another Buddy, a ‘compound’ Buddy will be created. The status of this compound Buddy will represent the most ‘available’ presence of the two (or more) Buddies underlying this compound Buddy. If you hover your mouse over this compound Buddy, you will see an arrow. Click this to expand (or contract) the compound Buddy.

## Floating Buddies

You can also drag a Buddy off of the Buddy List and it will ‘float’ on your screen. When a Floating Buddy comes near to another Floating Buddy, they will ‘attach’ to each other much like to magnets would ‘snap together’. If you wish to ‘unsnap’ the connected Floating Buddies, simply click the mouse on a Floating Buddy, and ‘tear away’ (drag quickly) from the other Floating Buddy. Floating Buddies can be useful if you wish to focus on only a few Buddies while hiding (or minimizing) the larger Buddy List. See Figure 9.



Figure 9: Floating Buddies

## Buddy List Menus

The JBM Buddy List has many menus. Some are specific to the Buddy List, others specific to Buddy Groups (named collections of Buddies), while most are specific to Buddies.

### STATUS MENU

If the end-user is connected (online) and they wish to change their status, clicking the drop-down menu labeled ‘Available’ will display a list of other status choices. See Figure 10.

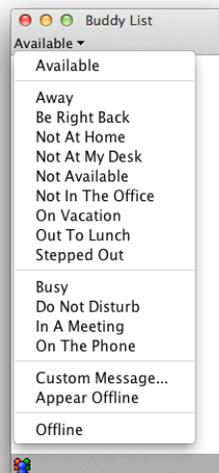


Figure 10: Status Drop-down Menu

### PROTOCOL MENUBAR MENU

Another Buddy List drop-down menu is available by clicking on an icon on the Protocol menubar. This menu will add or remove choices depending on what IM Accounts are online or not. See Figure 11 for an example with one JBuddy Server account connected.

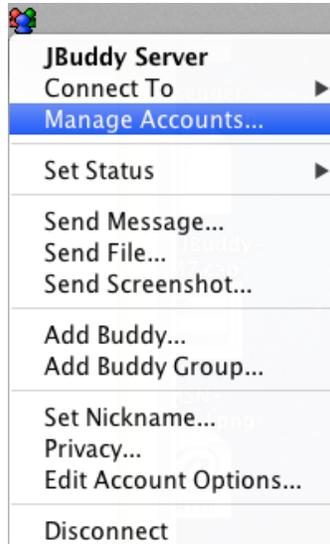


Figure 11: JBuddy Server Protocol menubar drop-down

### BUDDY LIST MENU

Right-clicking the Buddy List (without selecting a Buddy Group or Buddy) will bring up the Buddy List Menu. These settings will alter how the behavior and display of Buddy List Groups, and Buddies. See Figure 12.

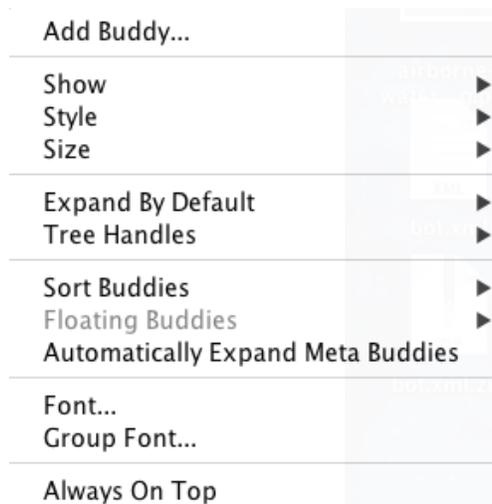


Figure 12: Buddy List Menu

## Chat Log Viewer

When the end-user enables client-side chat logging, all the chats between the end-user and other buddies are recorded as text chat logs on the end-user computer. Server-side chat logging is also available for JBuddy Server irrespective of client-side chat logging. The server-side chat logging can be a vital record of chats for compliance or regulatory purposes. When JBM is licensed with an enterprise license, a powerful chat log viewer is enabled to view history, browse and search client-side chat logs. End-users can browse the client-side chat logs by choosing the Log Viewer menu. The Chat Log Viewer can be navigated as shown in Figure 13:

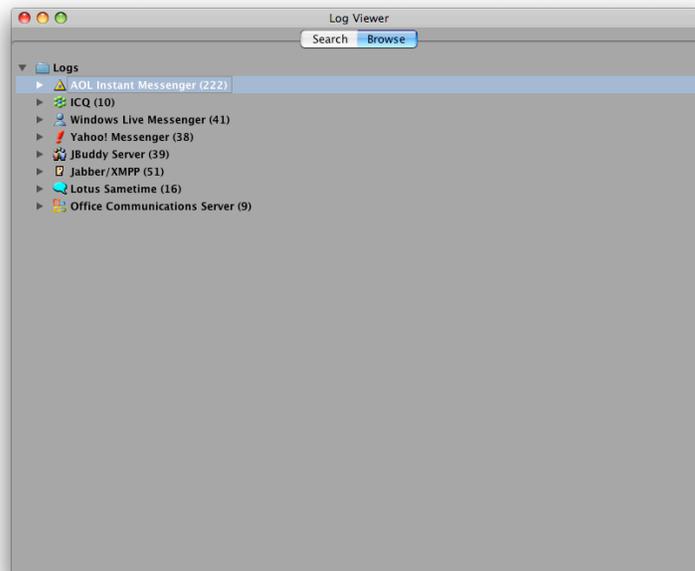


Figure 13 Log Viewer (browse)

Figure 14 shows the Chat History Window. The calendar on the left of the Chat History allows for navigation to a specific year, month and day. The days that chat was logged appear in **bold** and are clickable.

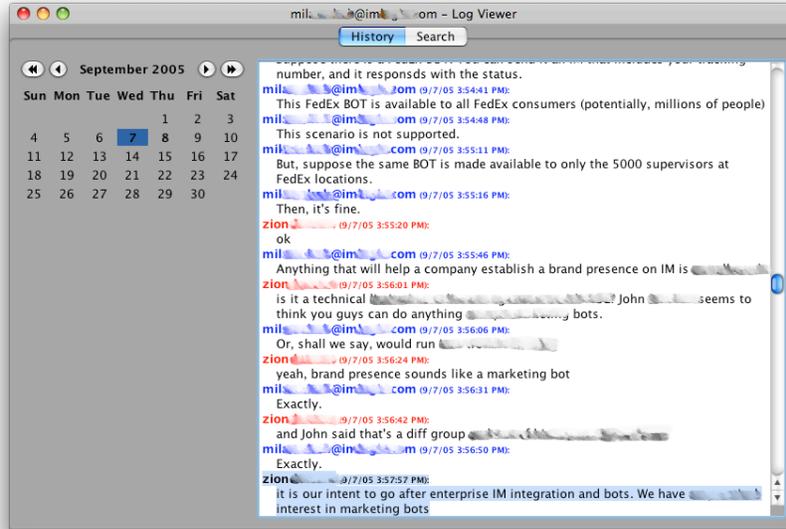


Figure 14: Chat Log Viewer (history)

In addition to browsing chat log history, end-users can search the chat logs using a powerful search interface. Figure 15 shows search results across multiple IM services. Double clicking on a row in the search result will switch views in the Log Viewer to History and scroll to the specific chat record found in the search.

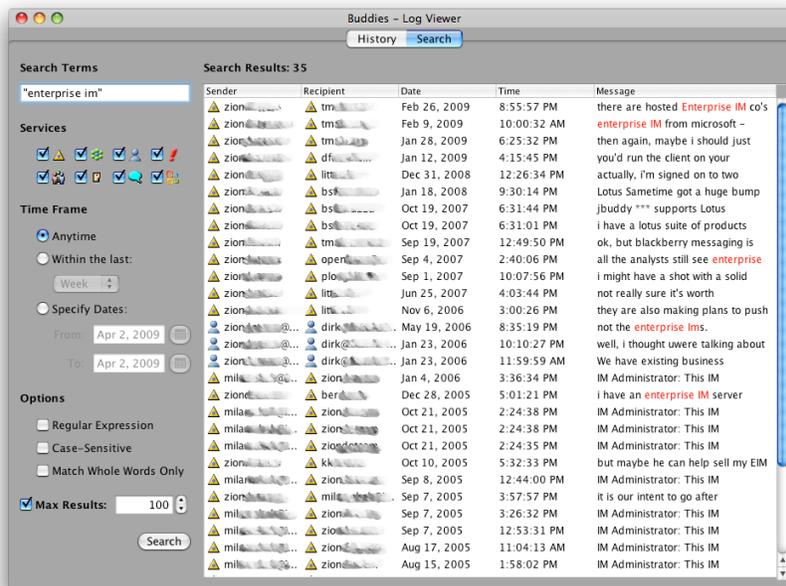


Figure 15: Chat Log Viewer (search)