

NETID CHATSURE

USER GUIDE

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OVERVIEW

ChatSure is a secure, enterprise-grade, web messenger system. ChatSure allows your employees to communicate securely in real-time, with colleagues, suppliers, customers, and partners, using just a web browser. Employees can use it on any computer at work, home, or abroad, with the confidence that they are communicating with their genuine, verified contacts.

CHATSURE USER REQUIREMENTS

- A business (professional) or personal NetIDme account.
- An internet connection (56 Kbps or faster recommended).
- A web browser: Microsoft Internet Explorer 6.0 or later, Netscape 7.1 or later, Mozilla 1.6 or later.

SECTION 1:

CREATING A NETIDME ACCOUNT

In order to use the ChatSure Enterprise IM system, all employees must sign-up for a professional account with NetIDme, the digital identity management service. A NetIDme account allows ChatSure users to send a 'Net-ID' card to their contacts. A Professional Net-ID card is like a virtual business card, it simply confirms a person's name, job title, department, and organisation name.

Employees should follow the steps below to create their NetIDme account:

- I. Visit the organisation's unique ChatSure URL:
e.g. www.netidme.com/yourcompanyname
- II. Click on the New User link at the bottom left hand side of the screen, and complete the short online registration form following the guidance notes below:

Notes:

- a) Nicknames should be in the format of: firstname.surname
 - b) Users should choose a unique, memorable password for their account
 - c) A Company email address must be used when registering, not a personal email address
- III. New users will then receive an email asking them to confirm their NetIDme account registration. Users should follow the instructions contained in the email.

SECTION 2:

INSTALLING THE CHATSURE AUTO LAUNCH APPLICATION (OPTIONAL)

Employees can configure ChatSure to launch automatically when they start their computer each day. Employees should follow the steps below to download the ChatSure AutoLauncher:

- I. Navigate to: www.netidme.com/yourcompanyname

Important:

Users should ensure that pop-ups are enabled for this page or add it to their trusted sites in the Tools/Internet Options/Security tab in Internet Explorer.

- II. Enter nickname (firstname.surname) & password, check the “*Remember me*”, “*Remember my password*” and “*Stay logged in (2 weeks)*” boxes, and click login. The ChatSure IM system will open. Minimize the ChatSure IM window for now.
- III. In the bottom of the ChatSure homepage screen, a link to download the auto launcher file will appear.
- IV. Click on the link to download and save the auto-launcher into the computers’ Start-up menu:

If using Microsoft Vista, browse to the folder “C:\ProgramData\Microsoft\Windows\Start Menu\Programs\Startup” and click ‘save’.
If using Microsoft Windows XP, browse to the folder “C:\Documents and Settings\All Users\Start Menu\Programs\Startup” and click ‘save’.
- V. Restart the computer, ChatSure will auto-launch at next login.

SECTION 3: ADDING CONTACTS

Employees should follow the steps below to add contacts to their ChatSure account:

- I. Open the ChatSure IM window.
(If users did not install the AutoLauncher, they should visit the organisation's unique ChatSure home page www.netidme.com/yourcompanyname to login).
- II. Click the 'Add Contact' link in the control panel.
- III. The contacts window will open, users can then search for contacts by their; nickname, email address or full name. Users can perform a partial search by typing in the first few letters of the person's contact details and clicking on the search button. The contacts window will display all possible matches.
- IV. Users should select the contact they want to add, and *click 'Add'*. A note displayed in red will then appear 'This user has been added to your contacts'. Users can continue to add contacts as required.
- V. From now on, each time the user opens the ChatSure IM window, they will be able to see which of their contacts are online.

SECTION 4:

CHATSURE FUNCTIONALITY (FOR END USERS)

I. Send an instant message:

Double-click the contact you want to send a message to. A message window will pop up.

Type your message, and then click Send. You can even send messages to contacts who are offline, and they will receive the message the next time they are online.

II. Transfer a file:

Double-click the contact you want to send a file to.

In the active message window, click on the Send Files link.

Browse to the file you want to send, and then click Send.

III. View message history:

ChatSure stores all messages you have sent and received. *To view a previous conversation, go to Actions, and then select Message History.* The 'Message History' box will appear on your screen. You can then either; filter by contact name, or search for all messages which include a certain word or number.

IV. Confirm your identity (send your Net-ID card):

ChatSure allows you to confirm your identity at any time prior to starting an IM dialogue. This is particularly important if you are about to share company-sensitive information.

To prove your ID to one of your contacts, click on the Send Net-ID card link in the active message window. For security purposes, a new window will open asking for your nickname and password.

Once you have entered your nickname and password correctly, a hyperlink will display in the message window. Your contact can then click on the link, enter their login details, and view your Net-ID card.

V. Configure your settings (within the message window control panel):

- Choose an Avatar (*Choose an avatar to display beside your name*)
- Auto Popup On/Off (*Message box can pop-up every time you receive a message*)
- Play/Disable Sounds (*Play a sound each time a new message arrives*)

