

**QUICKCONFERENCE™**

**For Macintosh® and Windows® Networks**

**[www.cesoft.com](http://www.cesoft.com)**



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Fourth Edition

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# TABLE OF CONTENTS

<b>WELCOME TO QUICKCONFERENCE!</b> .....	<b>5</b>
How QuickConference Works .....	5
Technical Support .....	6
Contact Information .....	6
Before You Call .....	6
Information you need .....	6
Sales and Customer Service .....	7
Contact Information .....	7
Ownership Transfer .....	7
Change of Address .....	7
<b>CHAPTER 1: INSTALLING</b> .....	<b>9</b>
Requirements .....	9
Installing .....	9
Backing Up Data and Preferences .....	9
File And Folder Locations .....	9
<b>CHAPTER 2: USING QUICKCONFERENCE</b> .....	<b>11</b>
Logging In .....	11
The Client Interface .....	12
Adjusting Pane Size .....	12
QuickConference Menus .....	13
Apple Menu .....	13
File Menu .....	13
Edit Menu .....	14
DoNotDisturb Menu .....	14
Servers Menu .....	15
AddressBooks Menu .....	15
Options .....	15
Personal .....	15
Notification .....	16
General .....	16
Views .....	17
Do Not Disturb .....	18
Instant Reply .....	18
Sending Messages .....	18
Conferencing Over the Internet .....	19
Launching URLs .....	19
Receiving Messages .....	19
Address Books .....	19
Editing Address Books .....	20
Edit and Add Special .....	21
Servers .....	21
<b>INDEX</b> .....	<b>23</b>
<b>NOTES</b> .....	<b>26</b>



# WELCOME TO QUICKCONFERENCE!

QuickConference is a cross-platform peer-to-peer conversation tool that can be used with or without an e-mail system. When you need answers now, you can't afford to wait for e-mail, play phone tag, or run from office to office—QuickConference is the answer. Its instant messaging capabilities can save you time and money.

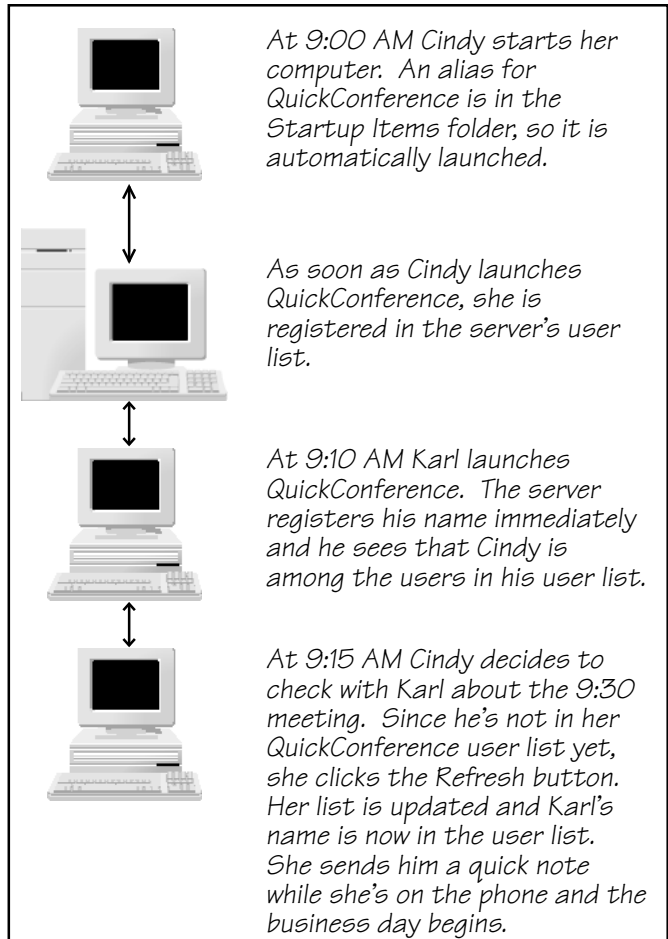
## HOW QUICKCONFERENCE WORKS

QuickConference consists of two main components: the client and the server. The client software is installed on user workstations throughout your network. When users send QuickConference messages, QuickConference notifies the recipient of the new message and the real-time “conversation” between the users proceeds on a peer-to-peer basis. This means the messages only travel between the computers involved in the conference—messages do not have to be routed through a server.

The Prairie Server is installed on one machine and it is used to register and publish which users on the network are available for conferencing.

Prairie Server is accessed by the QuickConference client only:

- During automatic refreshes.
- When the client is launched.
- When the client selects the Refresh button.
- The client accesses user information on the server for use in maintaining client address books.



*How the Prairie Server and clients stay in touch.*

## **TECHNICAL SUPPORT**

All CE Software products include the consulting services of an experienced Technical Support staff. CE Software offers online, fax and telephone support.

### **Contact Information**

Regular hours are Monday through Friday from 8:00 A.M. to 5:00 P.M. U.S. Central Time. CE Software Technical Support can be reached by:

- Phone: 515-221-1803
- Fax: 515-221-1806
- Newsgroups: <http://www.help.cesoft.com/>
- E-mail: [ceonline@cesoft.com](mailto:ceonline@cesoft.com)

### **Before You Call**

Please verify the following:

- Does your hardware and Operating System version meet the minimum requirements?
- Have you checked the manual or the most updated documentation, located at <http://www.cesoft.com/>, to see if your problem is discussed?
- Have you checked the CE Software Technical Support Web page at <http://www.help.cesoft.com/>?
- Have you checked the CE Software newsgroups at <http://www.help.cesoft.com/tech/newsgroups.html>?

### **Information you need**

To help our Technical Support team assist you as quickly as possible, please have the following information available when you speak with, or write to, a Technical Advisor:

- Product name and version (e.g. InOutTracker v. 1.6)
- Serial number. Copy it here for future reference \_\_\_\_\_
- Computer type and model (e.g. PPC 7500/100 or G4/500).
- Operating system and version (e.g. Mac OS v. 9.1).

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### **Contact Information**

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# CHAPTER 1: INSTALLING

Your Network Administrator must have the Prairie Server installed and running with your users' accounts setup before QuickConference clients can take advantage of instant messaging.

## REQUIREMENTS

- 68040 processor or greater
- 16 MB RAM
- System 7.6.1 or greater
- TCP/IP

## INSTALLING

- 1 Insert the QuickConference disk or CD and double-click the client installer icon.
- 2 Click the Continue... button on the QuickConference introduction screen.
- 3 Read the Read Me and click Continue.
- 4 Select a destination on your hard drive for the QuickConference client files and click the Install button. A progress bar appears.
- 5 Click Quit when the installer informs you that installation was successful.
- 6 If you have purchased or want to run a 30-day demo of QuickConference's sister program InOutTracker, do so at this time.

When installation is complete, you can launch the QuickConference application from the Apple menu.

- ❖ Note: An alias of Prairie Client Listener is placed in the Startup Items folder so it is automatically launched when you restart your machine. PowerBook users may wish to remove the alias and only launch QuickConference manually when they are connected to the network.

## BACKING UP DATA AND PREFERENCES

Your data and preferences are located in these files and directories. Back these up as often as practical to avoid the loss of valuable information. It may be convenient to make copies of these files as soon as you have finished configuring your newly installed software. This may save time if you need to perform a fresh installation at a later date.

### File And Folder Locations

Back up the "Prairie Client Data" folder within the System Folder:Preferences folder. If you specified a file in which to archive messages (in the General Tab of Options), be sure to back up your archive file as well.



# CHAPTER 2: USING QUICKCONFERENCE

## LOGGING IN

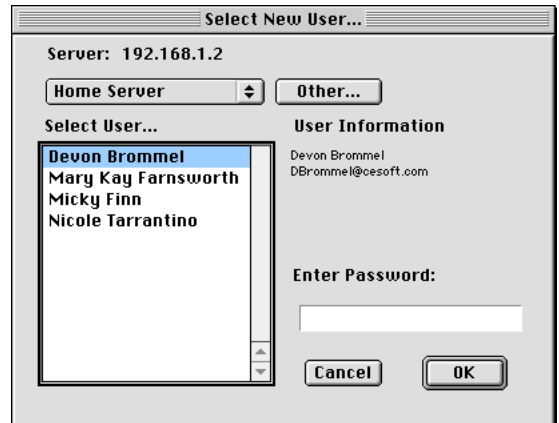
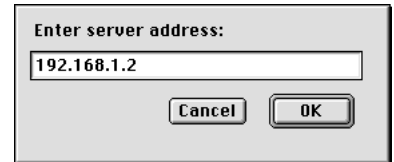
When you first launch the QuickConference client, the Login screen appears. The Login screen also allows for adding additional users who may want to use QuickConference from this client. You may delete users in the same manner. If an existing user's e-mail address or servers address changes, choose Edit User to update the user's account information. Click OK when New User... is selected.

**Log me in...** — This logs you into the server automatically, whenever your computer is started, so you are ready to receive messages immediately.

- ❖ *Note:* If you have created more than one user on your computer, this item is unavailable and the Login window will open and allow you to choose a user.

You must type the Prairie Server IP number (or machine name, if you have a DNS server) that your Network Administrator has given you.

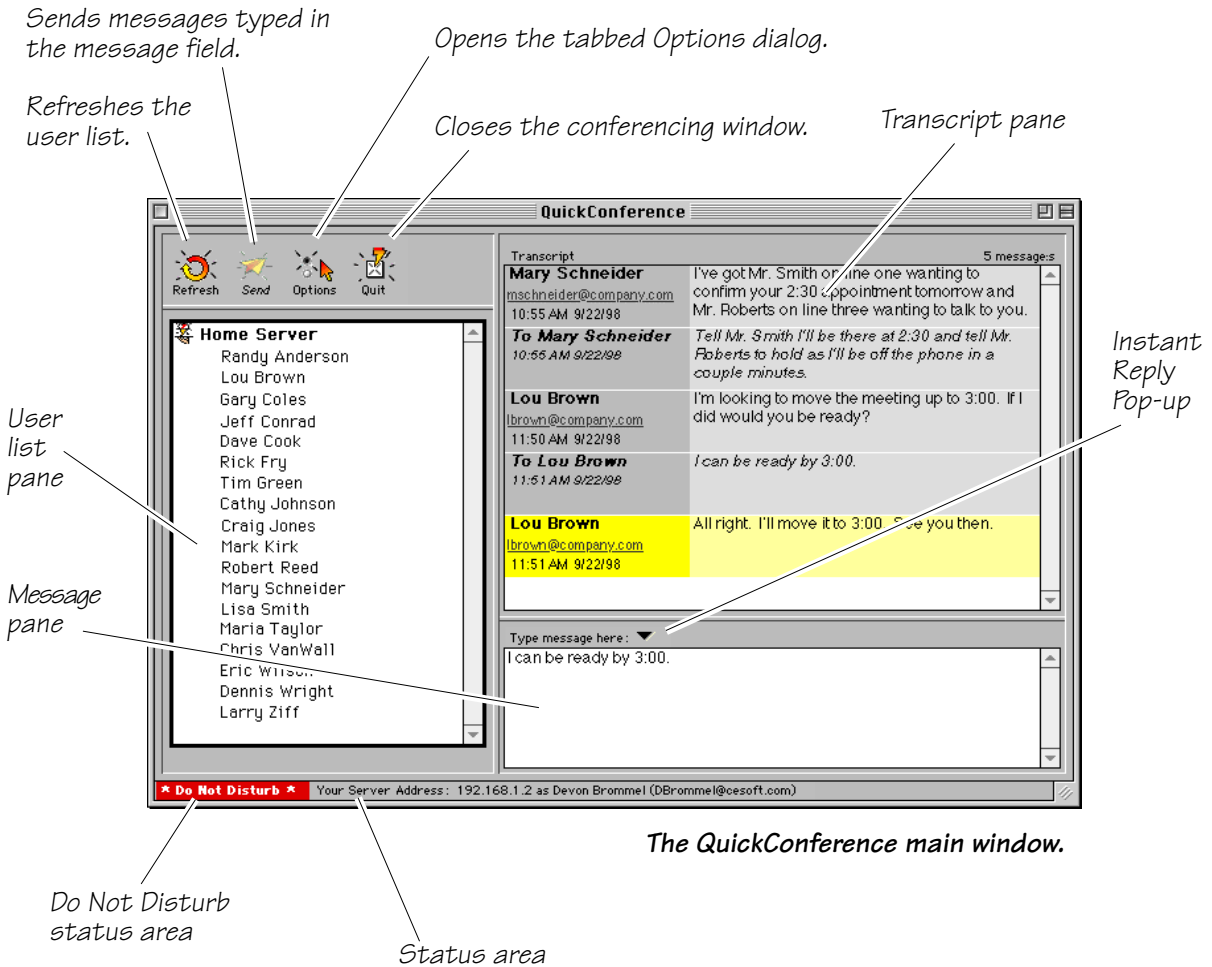
Select your name from the list and enter your password if you have one and click OK. If you are not in the list, you may be looking at the wrong server. If your Network Administrator has configured the Prairie Server with other servers, you can select them from the pop-up menu above the list of names. If they have not been setup, you can select the Other... button and type in the IP address or machine name of the server you want to access.



*Use your mouse or built-in keystroke (⌘-O) to select the Other... button.*

## THE CLIENT INTERFACE

The QuickConference interface offers quick and intuitive instant messaging for users. The main conferencing window appears when you launch QuickConference.



The QuickConference main window.

The status area normally shows your server address and e-mail address. If QuickConference is getting information from a server, the status area will display the progress. When Do Not Disturb is turned on the status area will display a red indicator and flash this icon (🔴) in the Apple menu.



### Adjusting Pane Size



To size the three panes in the conferencing dialog, move your cursor over a separator line and your cursor becomes a sizing tool. Click and drag the selected separator line until the size of the pane meets your needs.



When you position your cursor over the intersection of all three panes, a hand cursor appears. Use the hand-sizing tool to resize all three panes simultaneously.

# QUICKCONFERENCE MENUS

## Apple Menu

**About QuickConference...** — Choosing About QuickConference... opens a dialog box that shows you the version of QuickConference that is installed, and lists contact information for CE Software.

## File Menu

**Refresh** — Choosing the Refresh command will cause QuickConference to re-list the contents of the User pane. The application will refresh automatically every 5 minutes.

**Send** — This command will send your message to the selected user(s). This gives the same results as hitting the Enter key.

**Send Mail** — Choose this command if you want to send mail to the selected user(s). If you have an Internet style mail client, this command will open a blank mail message addressed to the intended recipient(s).

**Close** — Same as Quit and Stay Connected menu item below.

**Save Transcript...** — This command will open a standard file section dialog so that you can save a transcript of your conference as a text document.

**Page Setup...** — Choosing Page Setup... displays the standard Page Setup dialog box.

**Print Transcript...** — Choosing Print Transcript... displays the standard Print dialog, allowing you to print a transcript of your conversation.

**Log Out...** — This command will quit QuickConference completely and disconnect you from the Prairie Server. This will also log you out of InOutTracker, if it is running. Other users will not be able to send you messages after you log out.

**Change Users...** — This command will log you out of the Prairie Server and then take you to the QuickConference Login screen. At this point, you will be able to choose another user name, add another user, edit the information for an existing user, or delete a user.

**Quit and Stay Connected** — This command will quit QuickConference, it will still be running in the background and connected to the Prairie Server.

File	
Refresh	⌘R
Send	
Send Mail	⌘M
Close	⌘W
Save Transcript...	⌘S
Page Setup...	
Print Transcript...	⌘P
Log Out...	⌘L
Change Users...	⌘U
Quit and Stay Connected	⌘Q

## Edit Menu

**Undo** — This command is not active in QuickConference. It is included on the menu for compatibility reasons.

**Cut** — Choosing the Cut command places the selected text in the Clipboard and removes it from the text field.

**Copy** — Choosing this command places the selected text or transcript items into the Clipboard.

**Paste** — The Paste command places a copy of the clipboard contents (if appropriate) into the text field.

**Clear** — Choosing Clear will remove the selected text or transcript items.

**Clear Transcript...** — This command will clear the contents of the transcript.

**Select All** — Choosing Select All will select everything in the field containing the insertion point. If used in the user list, it will select all users in the list. If used in the transcript pane, it will select all listed messages, sent and received.

**Options...** — This will open the Options dialog. This is where you can set your preferences for QuickConference.

**Change Password...** — This command will allow you to change your user password.

**Edit Address Books...** — Choosing Edit Address Books... will give you the ability to edit, delete, or create address books. In your address books, you will be able to list users from any of the servers for which you have access. You can also add an address manually by creating a Special Address.

## DoNotDisturb Menu

**None** — Choosing None will remove you from Do Not Disturb mode and make you available for messages from others.

The available Do Not Disturb messages are listed at the bottom of this menu. You can edit this list of messages in the Do Not Disturb tab of the Options dialog.

**Other...** — Choosing this command will allow you to enter a Do Not Disturb message that is not stored and used only once.

Edit	
Undo	⌘Z
Cut	⌘X
Copy	⌘C
Paste	⌘V
Clear	
Clear Transcript...	⌘T
Select All	⌘A
Options...	
Change Password...	
Edit Address Books...	

DoNotDisturb	
✓ None	⌘0
I am occupied	⌘1
I am in a meeting	⌘2
I am on the phone	⌘3
I am out of my office	⌘4
I am out to lunch	⌘5
Other...	⌘6

## **Servers Menu**

**None** — Choosing None will remove references to other servers from your client's main window. You will only see those names that are listed on your Home Serve and names from selected address books, if any.



Other available servers are listed at the end of this menu. Only one other sever may be selected at a time.

## **AddressBooks Menu**

**None** — Choosing None will remove any address book items from the user list in your client window. You will only see people listed who are currently available on your Home Server, or any other selected servers, if any.



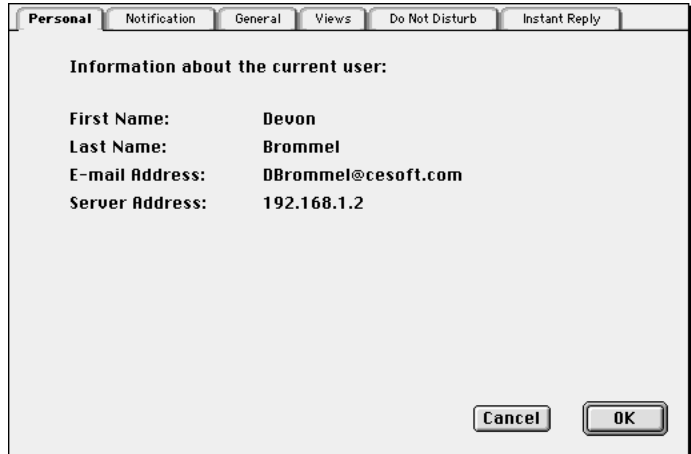
All available address books are listed at the end of this menu. Only one address book may be selected at a time.

## **OPTIONS**

Choosing Options... from the Edit menu, or clicking the Options button in the main window of QuickConference, will open a window containing a series of six tabbed sections. Here, you will be allowed to view user information, set notification options, adjust certain behavioral and visual aspects of QuickConference, what Do Not Disturb messages are available, and enter your Instant Replies.

### **Personal**

The Personal tab details information about the current user. It lists the user's name, e-mail address, and the IP address of the Prairie Server for which you are connected.



## Notification

When you receive QuickConference messages, you can choose how you are notified.

**Bring QuickConference to the front** — The main messaging window appears in the foreground of your desktop.

**Flash Icon** (🔊) — Your Apple menu icon blinks with a QuickConference icon when you receive a message. It will stop flashing when you type or click in the main messaging window.

**Play sound** — Your computer plays the sound selected in the Notification sound pop-up menu.

**Notification sound** — Choose the sound you wish QuickConference to play when a message is received (must have Play Sound checked above).

**Accept messages from...** — People can create address books with special addresses to send messages to people outside of their Server Ring. Since your system cannot verify the identity of people not on one of its servers, these messages are normally blocked. If you wish to receive these messages, so you can converse with someone outside of your company, you will need to check this box and have your Network Administrator configure the server to let them through. If the server is not configured to allow messages, checking this box will have no effect.

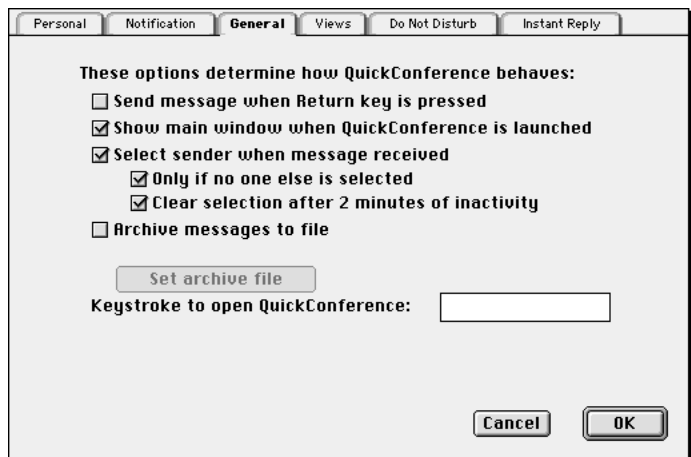


## General

Adjust options in the General tab to specify how QuickConference behaves.

**Send message when...** — Select this option to send messages when you press the Return key on your keyboard.

❖ *Note:* Messages are always sent when you press the Enter key on the numeric keypad of your keyboard, or choose Send from the File menu, or when you click the Send button on the QuickConference toolbar.





**Show main window...** — Displays the main conferencing window when you launch the QuickConference client.

**Select Sender...** — Automatically selects the sender of a message in the User pane, so you can reply quickly.

- **Only if no one else is selected** — Selects the sender of a message only when no other item is selected in the User pane.
- **Clear selection after 2 minutes...** — Clears any selections in the User pane if QuickConference is inactive for 2 minutes.

**Archive messages to file...** — Archives all messages that QuickConference sends or receives for later review.

- **Set archive file...** — Allows the user to choose the location and name of the text archive file.

**Keystroke to open...** — Specifies a keystroke that opens QuickConference when you are logged in.

## Views

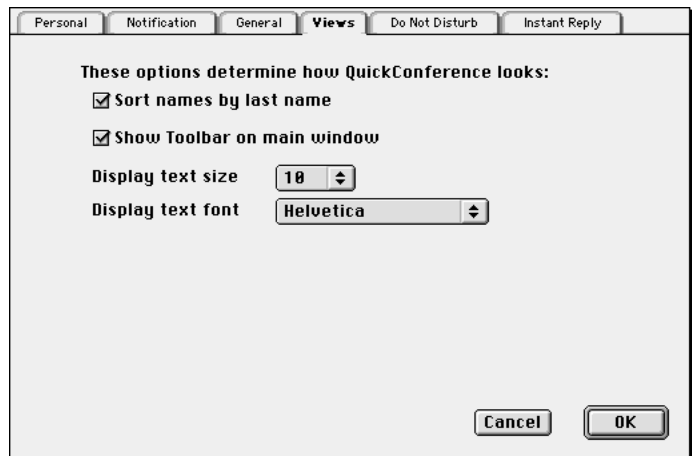
Adjust options in the Views tab to specify how QuickConference sorts names, displays its Toolbar, and displays text.

**Sort names...** — Determines whether the list of users is sorted by last name or first name.

**Show Toolbar...** — Choose whether or not to display the Refresh, Send, Options and Quit buttons in the main conference window. These commands are also available in the menus or through keyboard shortcuts.

**Display text size...** — Specifies the size of the font in the main conferencing window.

**Display text font...** — Specifies the typeface of the font in the main conferencing window.



## Do Not Disturb

You can customize up to five phrases that will appear on the senders screen when you have one of the Do Not Disturb items selected in the DoNotDisturb menu.

**Have InOutTracker check...** — If you are also using InOutTracker, generally you want to be out while you have Do Not Disturb on. Check the box to have your out status set when you turn on Do Not Disturb and in status set when you turn off Do Not Disturb.

## Instant Reply

Allows you to customize up to seven phrases that can be quickly entered from a pop-up menu for fast replies.

**Send reply immediately...** — If checked the Instant Reply that you select from the pop-up menu in the main window will be sent right away without the need to press the Send button.

Personal Notification General Views **Do Not Disturb** Instant Reply

Edit the phrases for the Do Not Disturb menu:

- I am occupied
- I am in a meeting
- I am on the phone
- I am out of my office
- I am out to lunch

Have InOutTracker check me in or out automatically when I change DND.

Cancel OK

Personal Notification General Views Do Not Disturb **Instant Reply**

Edit the phrases for Instant Replies:

- Yes
- No
- Please take a message.
- Please have them hold, I'll be off in a minute or two.
- Thank you.
- Please see me when you have a minute.
- My call just got longer, please take a message for me.

Send reply immediately on Instant Reply selection, do not wait for Send Button.

Cancel OK

## SENDING MESSAGES

To conference someone listed in the User pane, follow these steps:

- 1 Select a user from the User pane by clicking once.
- ❖ *Note:* Send to multiple users by pressing the Shift key to select adjacent users or the Command key to select nonadjacent users. Double clicking any received transcript item will select the sender's name in the User pane.
- 2 Type your message in the Message pane (up to 512 characters).
- 3 Click the Send button or the Enter key on the numeric keypad of your keyboard.

- ❖ *Note:* Select the “Send message when Return key is pressed” option, in the General tab of the Options dialog, to send messages when you press the Return key. Double clicking a User, Address Book or Server will also send your message; you can also choose Send from the File menu, or clicking the Send button on the QuickConference toolbar. Double clicking an Address Book or Server will send the message to everyone listed in the Address Book or Server.

When the recipient responds to your message, you are notified by the method you specified in the Notification tab of the Options dialog. The response appears in your Transcript pane in plain text.

- ❖ *Note:* Double clicking a sent transcript item will show a list of the recipients for the message.

### **Conferencing Over the Internet**

You can conference over the Internet if:


- You are connected to the Internet.
- Your Server Address field is set to communicate with a remote Prairie Server.

### **Launching URLs**

When you send messages to other QuickConference users, you can include URLs to Web sites. The URLs are blue and underlined and all the recipient has to do when they receive the URL is double-click it. If you are using a Mac-OS based computer and Internet Config is installed, the selected Internet browser launches and opens the URL. Some examples of valid URLs include:

- <http://www.cesoft.com>
- <ftp://ftpts.cesoft.com/>
- <mailto:ceonline@cesoft.com>


## **RECEIVING MESSAGES**



When you receive a message, it will appear in the transcript in a different color so that you can easily see what new messages have come in. If you have the Notification tab option for Flash Icon checked you would also get this notify icon () in the Apple menu. The transcript will change color and flashing icon will stop when you send a new message, close QuickConference, or do a manual refresh.

## **ADDRESS BOOKS**

A user can create and maintain up to 30 address books. An address book includes the names of the users that an individual might communicate with on a regular basis or it might consist of a whole department of people such as Sales or Accounting. The QuickConference client can toggle between any or none of the Address Books by pulling down on the Addresses menu.

The names of the users in the Address Book will appear in your user list above your Home Server. If a user is on-line, and is able to receive a message, their name will be displayed normally. A user's status could also be off-line (unable to receive a message) or his or her status could be unknown.

If a user's status is off-line (again, unable to receive a message), the No symbol (  ) appears by this person's name.

If a user's status is unclear or unknown, the Question Mark (  ) will be displayed next to his or her name. If the user has a version of QuickConference that does not accept encrypted messages, a Lock Icon (  ) shows next to their address and messages to them are sent unencrypted. If the user is able to receive a message, then the message is sent normally. If the user sends a message, and it turns out that the intended recipient is off-line, then a message will appear stating that he or she is in off-line after a brief pause.

❖ *Note:* The Question Mark will appear if the name in the Address Book is registered on a server that is not displayed in the main window.


### **Editing Address Books**


Select Edit Address Books... from the Edit menu. This will bring up a window with which to create, rename, edit and delete address books.

To create a new Address Book click New... and then enter the name of the Address Book in the window provided. Once the name is entered, click OK.

On the left, the screen now lists the users from the server that is selected in the pull down menu above the list. The right box will include the user names in the Address Book that is being created or edited.

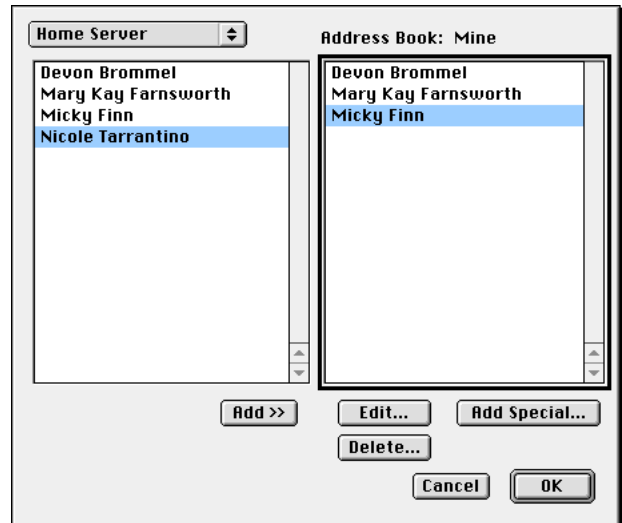
*Use your mouse or built-in keystrokes to select these items.*

-A to Add an address.

-E to Edit an address.

-D to Delete an address.

-S to Add a Special Address.




Double clicking or selecting and clicking the Add>> button will move a user into the Address Book. A user in the Address Book can be deleted by selecting the user and clicking the Delete... button.

### **Edit and Add Special**

A name in the Address Book may be edited by selecting it and clicking the Edit... button or by simply double clicking a name.

A name can be added directly to the address book by clicking the Add Special... button and filling in the name, the e-mail address, and the IP number of the recipient's Prairie Server.

- **IMPORTANT:** The E-mail Address and Server Address must match the information entered on the server when editing or creating a special address. If this information is not correctly entered, there is no warning and the name will continually have the No symbol (  ) listed next to it.






## **SERVERS**

QuickConference will default to display the user's Home Server and those users from the Home Server who are currently logged onto the system. If the server software is set to link to any other Prairie Server(s), they will be listed in the client's Servers menu. The QuickConference client can toggle between any or none of the listed servers. Once a server is selected, it and its on-line users will be listed below the Home Server.



# INDEX

## Symbols

- Do Not Disturb Icon  12
- Lock Icon  20
- No symbol  20, 21
- Notify Icon  16, 19
- Question Mark  20

## A

- About QuickConference... 13
- Accept messages from... 16
- Add Additional User Account 11
- Address Books 19
  - Editing Address Books 20
  - Editing Addresses 21
  - Special Addresses 21
- Adjusting Pane Size 12
- Archive messages to file... 17

## B

- Backing Up Data and Preferences 9
- Before You Call 6
- Bring QuickConference to the front 16

## C

- Change of Address 7
- Change Users... 13
- Clear 14
- Clear selection after 2 minutes... 17
- Clear Transcript... 14
- Client Interface 12
- Close 13
- Command key 18
- Conferencing Over the Internet 19
- Contact Information
  - Sales and Customer Service 7
  - Technical Support 6
- Copy 14
- Cut 14

## D

- Delete User Account 11
- Display text font... 17
- Display text size... 17
- DNS server 11
- Do Not Disturb Tab 18
- DoNotDisturb Menu 14

## E

- E-mail address 11, 12
- Edit Address Books... 14
- Edit Menu 14
- Edit User Account 11
- Editing Address Books 20

## F

- File And Folder Locations 9
- File Menu 13
- Flash Icon 16

## G

- General Tab 16

## H

- Have InOutTracker check... 18
- How QuickConference Works 5

## I

- Information you need 6
- Installing 9
- Instant Reply 18
- Instant Reply Pop-up 12
- IP Address 11

## K

- Keystroke to open... 17

## L

- Launching URLs 19
- Log me in automatically 11
- Log Out... 13
- Logging In 11

## M

### Menus

- About QuickConference... 13
- AddressBooks Menu 15
  - None 15
- Apple Menu 13
- Change Password... 14
- DoNotDisturb Menu 14
  - None 14
  - Other... 14
- Edit Menu 14
  - Change Password... 14
  - Clear 14
  - Clear Transcript... 14
  - Copy 14
  - Cut 14
  - Edit Address Books... 14
  - Options... 14
  - Paste 14
  - Select All 14
  - Undo 14
- File Menu 13
  - Change Users... 13
  - Close 13
  - Log Out... 13
  - Page Setup... 13
  - Print Transcript... 13
  - Quit and Stay Connected 13
  - Refresh 13
  - Save Transcript... 13
  - Send 13
  - Send Mail 13
- Servers Menu 15
  - None 15

## N

- Notification Sound 16
- Notification Tab 16

## O

- Only if no one else is selected 17

## Options 15

- Do Not Disturb Tab 18
  - Have InOutTracker check... 18
- General Tab 16
  - Archive messages to file... 17
  - Clear selection after 2 minutes... 17
  - Keystroke to open... 17
  - Only if no one else is selected 17
  - Select Sender... 17
  - Send message when... 16
  - Set archive file... 17
  - Show main window... 17
- Instant Reply 18
  - Send reply immediately... 18
- Notification Tab 16
  - Accept messages from... 16
  - Bring QuickConference to the front 16
  - Flash Icon 16
  - Notification Sound 16
  - Play Sound 16
- Personal Tab 15
- Views Tab 17
  - Display text font... 17
  - Display text size... 17
  - Show Toolbar... 17
  - Sort names... 17

## Options... 14

- Other... 14
- Other... button 11
- Ownership Transfer 7

## P

- Page Setup... 13
- Password 11
- Paste 14
- Personal Tab 15
- Play Sound 16
- Prairie Server IP number 11
- Print Transcript... 13

## Q

- Quit and Stay Connected 13

## R

- Receiving Messages 19



Red DND Indicator 12  
Refresh 13  
Requirements 9  
Return key 19

## S

Sales and Customer Service 7  
Save Transcript... 13  
Select All 14  
Select Sender... 17  
Send 13  
Send Mail 13  
Send message when... 16  
Send reply immediately... 18  
Sending Messages 18  
Server Address 12  
Servers 21  
Servers Menu 15  
Set archive file... 17  
Shift key 18  
Show main window... 17  
Show Toolbar... 17  
Sort names... 17  
Status Area 12  
Status Icons 20  
    Lock Icon 20  
    No symbol 20  
    Question Mark 20

## T

Technical Support 6

## U

Undo 14  
URL 19  
Using QuickConference 11

## V

Views Tab 17

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