



## **Instant Alert Manager Installation Guide**

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# ALERT MANAGER INSTALLATION GUIDE

## SYSTEM REQUIREMENTS

Alert Manager is designed to operate on Windows Server 2008 R2® and Windows Server 2012®.

**NOTE:** Alert Manager should not be installed on the same server as Lync®. There are configuration issues when trying to host this application where Lync® is hosted.

## ENVIRONMENT

- Active Lync 2013 environment
- SQL Server 2008 R2 -or – SQL Server 2012
- Access to Active Directory
- Desktop Experience (for Server 2008 R2) – or – Media Foundation (for Server 2012)

## OPTIONAL REQUIREMENTS FOR EMAIL-TO-IM GATEWAY

- SMTP or Exchange Server
- Ability to modify MX records

## SOFTWARE PREREQUISITES

- .NET Framework 4.5
- PowerShell 3.0
- UCMA 4.0 Runtime API [UcmaRuntime.msi]

## ENABLE REQUIRED ROLE SERVICES

Alert manager requires some role services to be installed before the installation of the application can proceed.

We have provided the appropriate PowerShell commands to quickly enable these roles services. They can be found in the **PS\_Commands** folder provided in the download. Or if you prefer, you can enable these services through the GUI using the following steps:

## ENABLE ROLE SERVICES IN WINDOWS SERVER 2008R2:

1. Start the Server Manager application as an administrator.
2. Select Roles from the directory tree.
3. Select Web Server, and scroll down to Role Services.

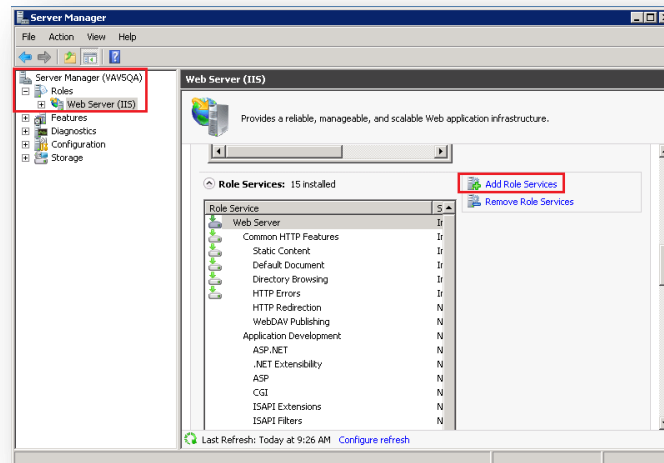


Figure 1: Add Role Services (Web Server (IIS))

4. Click on the option to “Add role services”
  - 4.1. Scroll to Application Development and select the following services:
    - **ASP.NET**
    - **.NET Extensibility**
    - **ISAPI Extensions**
    - **ISAPI Filters**

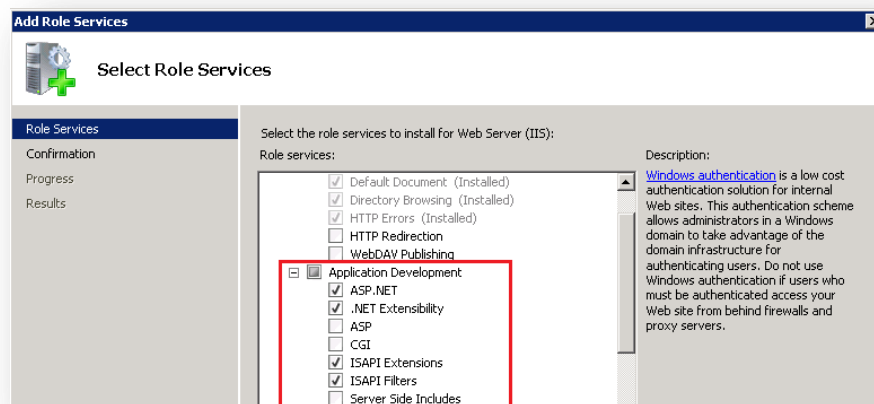


Figure 2: Select **Application Development** services

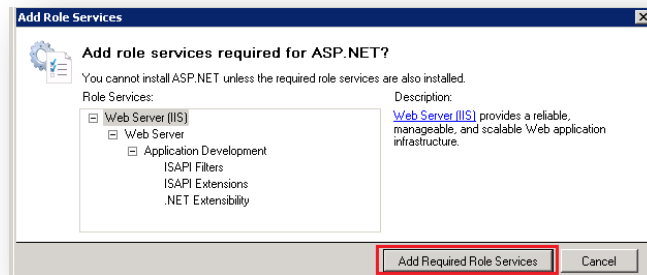


Figure 3: Select required role services for **ASP.NET**

4.2. Scroll to **Security** and select **Windows Authentication**.

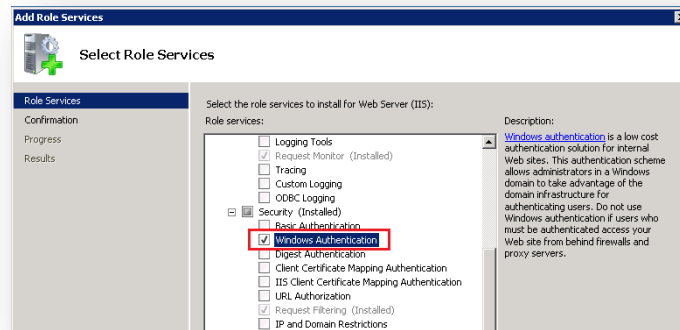


Figure 4: Select **Windows Authentication**

4.3. Scroll down until you find IIS6 Compatibility Mode, and select all the services in the **IIS6 Compatibility Mode** tree.

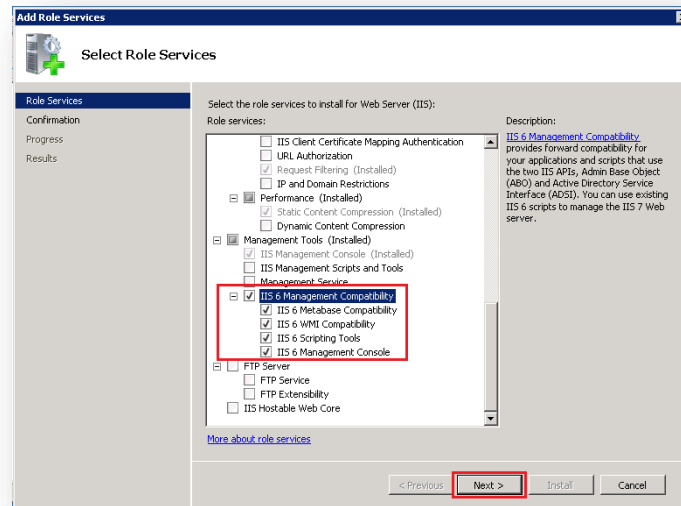


Figure 5: Select IIS 6 Management Compatibility

5. Click **Next** in the bottom right corner once all necessary services have been selected.
6. Click **Install** to install these services to the server.

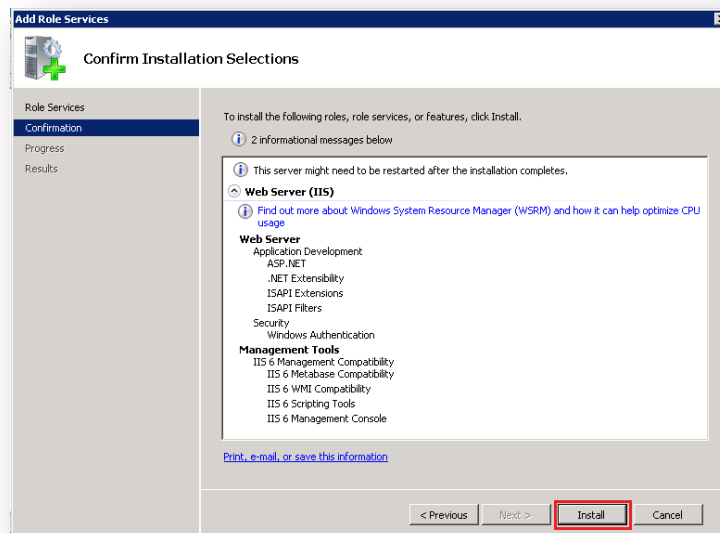


Figure 6: Install selected role services



- Click **Close** once installation of the selected services is completed.

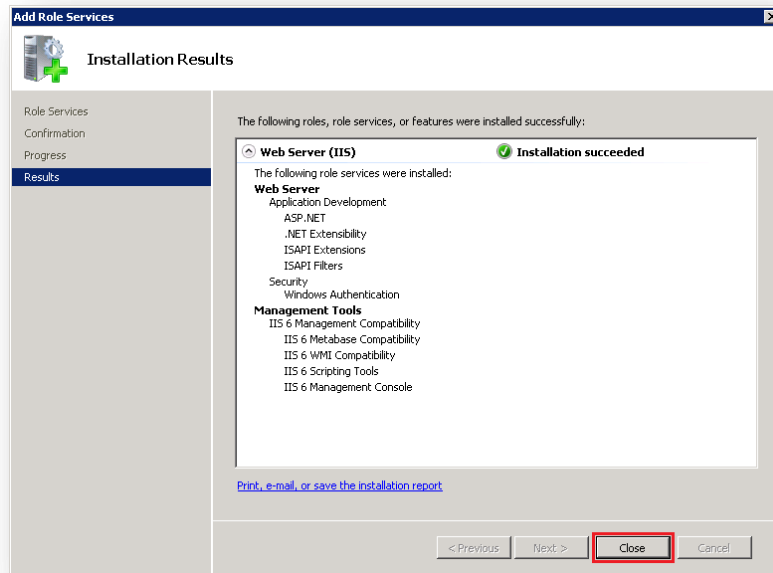


Figure 7: Installation of role services complete

## ENABLE ROLE SERVICES IN WINDOWS SERVER 2012:

- Open the Server Manager application.
- Select **Add Roles and Features** from the **Manage** option.

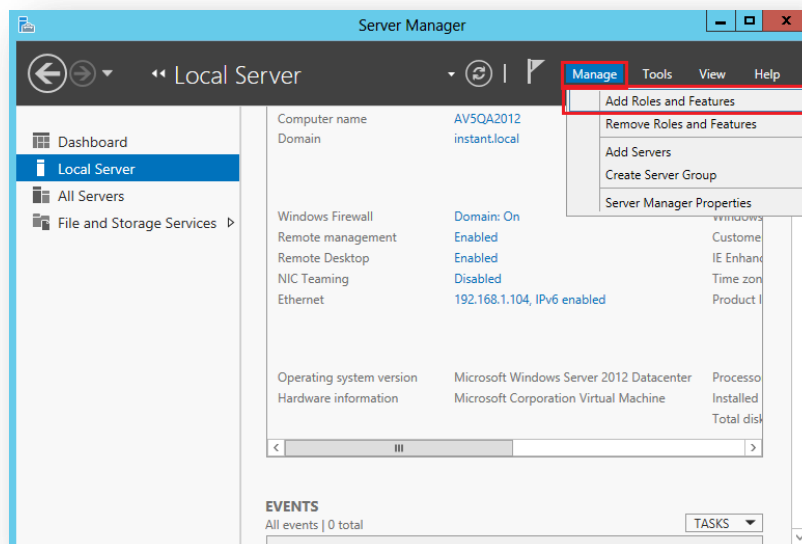


Figure 8: Add Roles and Features

- Select the option for **Role-based or feature-based installation** and click **Next**.

4. Select the appropriate server and click **Next**.
5. Add Web Server (IIS), and accept the Roles and Features prompted by the wizard. Click **Next**.

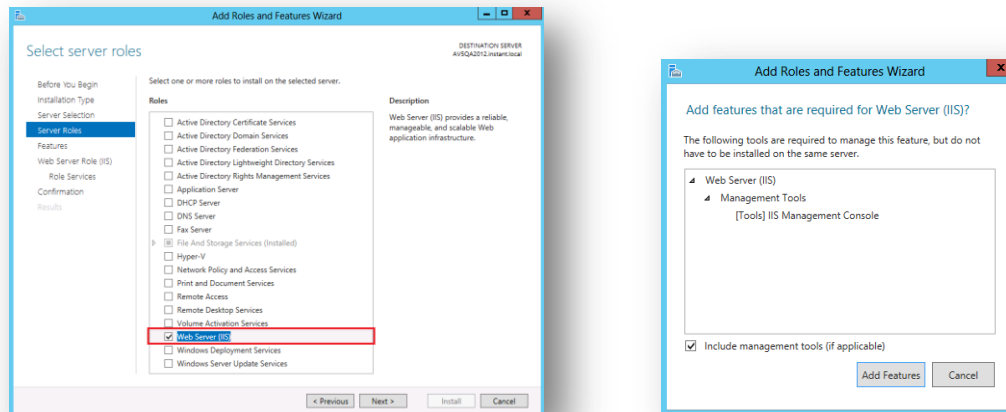


Figure 9: Add Web Server (IIS)

6. Do not select any features, and click **Next**.
7. Add Web Server (IIS) Role Services
  - a. Under **Common HTTP Features**, ensure the following services are selected:
    - **Default Document**
    - **Directory Browsing**
    - **HTTP Errors**
    - **Static Content**
  - b. Under **Security**, ensure the following services are selected:
    - **Request Filtering**
    - **Windows Authentication**
  - c. Under **Application Development**, select the following services:
    - **.NET Extensibility 4.5**
    - **ASP**
    - **ASP.NET 4.5**
    - **ISAPI Extensions**
    - **ISAPI Filters**

By manually selecting **ASP.NET** and **ASP.NET 4.5**, the wizard will prompt you to accept the others, as they are required to for these services to run.

- d. Under **Management Tools**, select **IIS 6 Management Compatibility**, and then select the four additional services:
  - **IIS 6 Metabase Compatibility**
  - **IIS6 Management Console**
  - **IIS 6 Scripting Tools**
  - **IIS 6 WMI Compatibility**

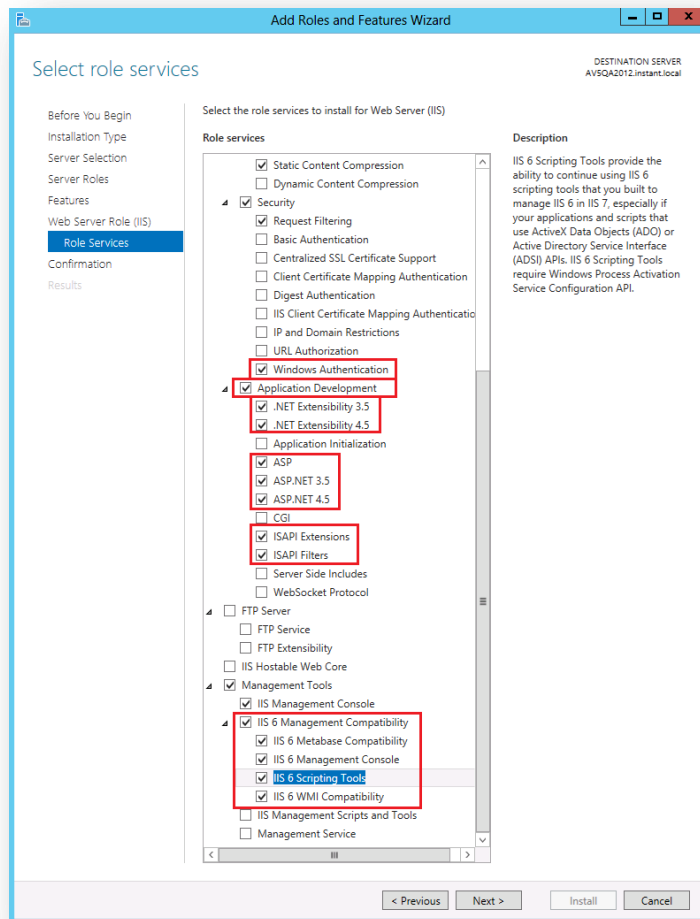


Figure 10: Add require role services

8. Click **Next** once these services have been selected.

9. Click **Install** to install the required services to your server.

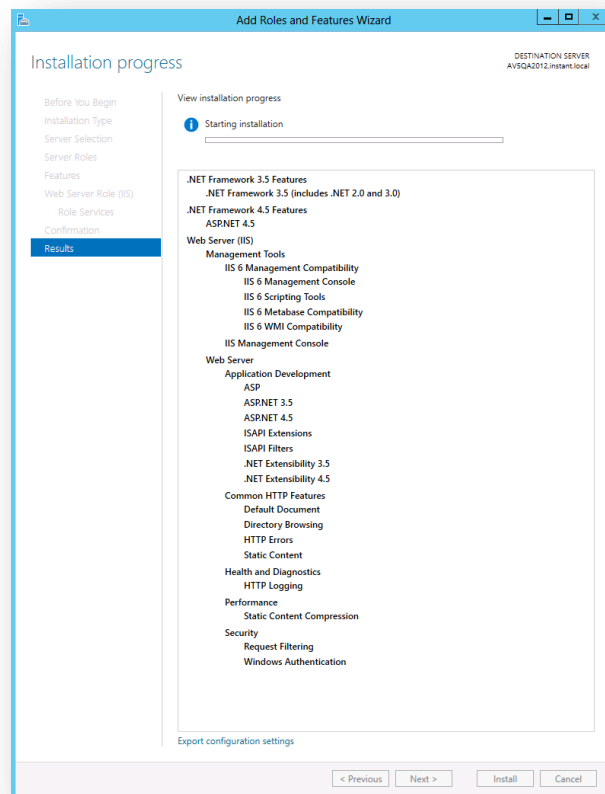


Figure 11: Installing required services

10. Installation of these services may take several minutes. Once complete, you are ready to begin installing Alert Manager.

## ADD SERVER FEATURES

To install some of the prerequisites, it will be necessary to enable some additional features on the server.

### WINDOWS SERVER 2008 R2

For Windows Server 2008 R2, it will be necessary to add the **Desktop Experience** feature. To do so, complete the following steps.

1. Start the Server Manager, and select **Add Features** in the Features Summary area.

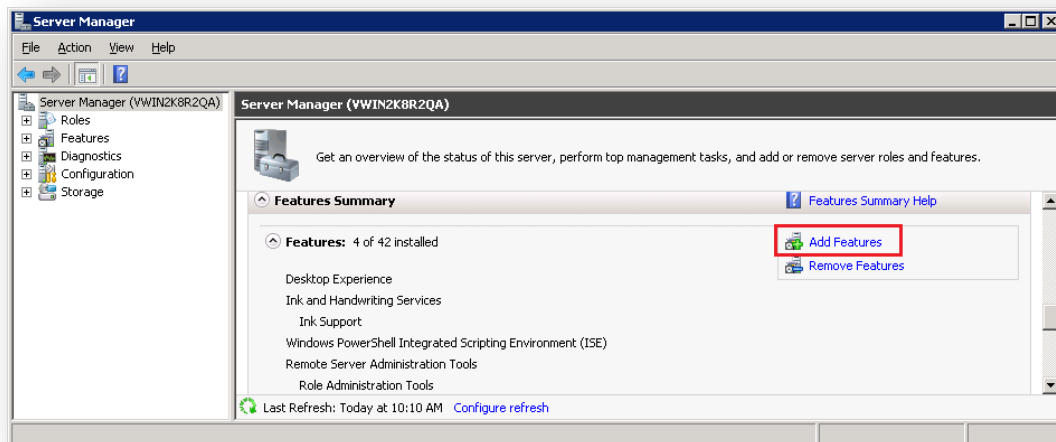


Figure 12: Add Features

2. Select **Desktop Experience**, and click **Next**.

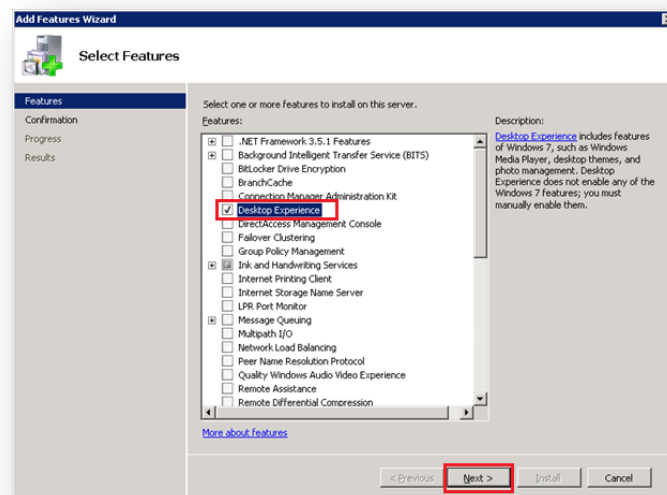


Figure 13: Select Desktop Experience

3. Accept the additional features required for Desktop Experience.

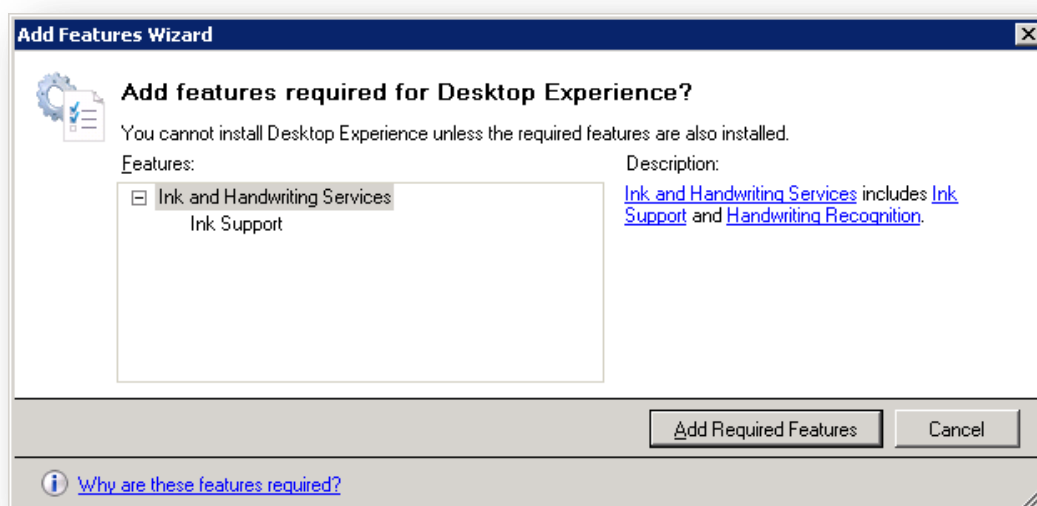


Figure 14: Accept required features

4. Restart the server when prompted once the installation is complete.

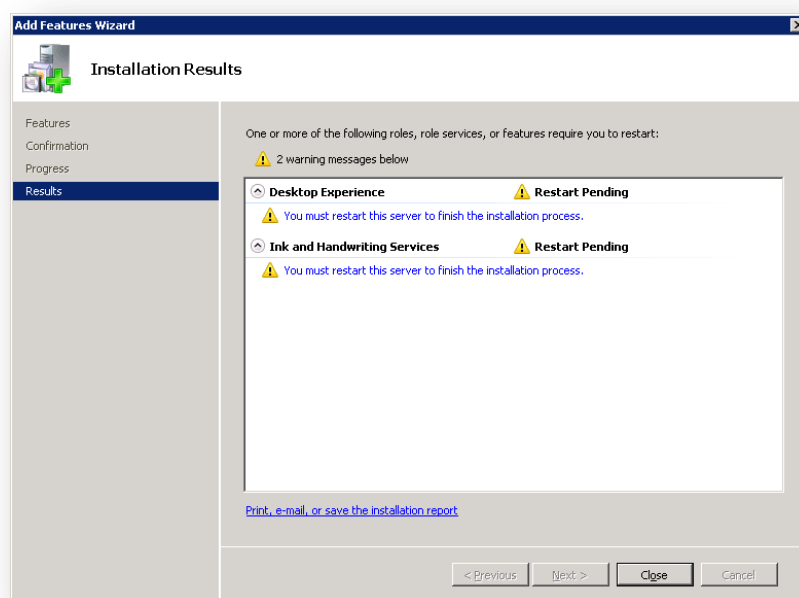


Figure 15: Installation of feature complete

## WINDOWS SERVER 2012

For Windows Server 2012, it will be necessary to add the **Media Foundation** feature. To do so, complete the following steps:

1. Start the Server Manager.
2. Click **Manage > Add Roles and Features**.
3. Select the **Media Foundation** feature, and click **Next**.

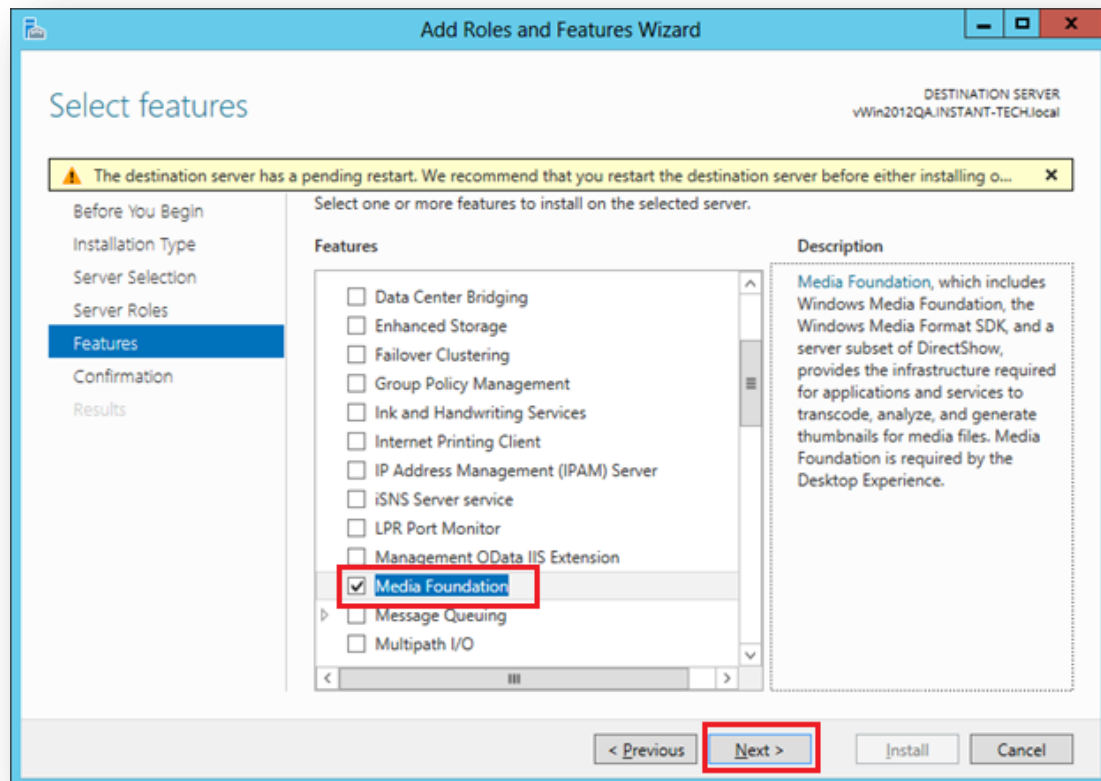


Figure 16: Add Media Foundation

4. Click **Install** to begin the installation of the feature to the server.

## INSTALL UCMA 4.0

The UCMA 4.0 Runtime can be downloaded from:

<http://www.microsoft.com/en-us/download/details.aspx?id=34992>

## ALERT MANAGER INSTALLATION

Once the required services, features, and prerequisites are installed, you are ready to begin installation of the Alert Manager application.

Run the **AlertManager2013** application provided in the Alert Manager download.

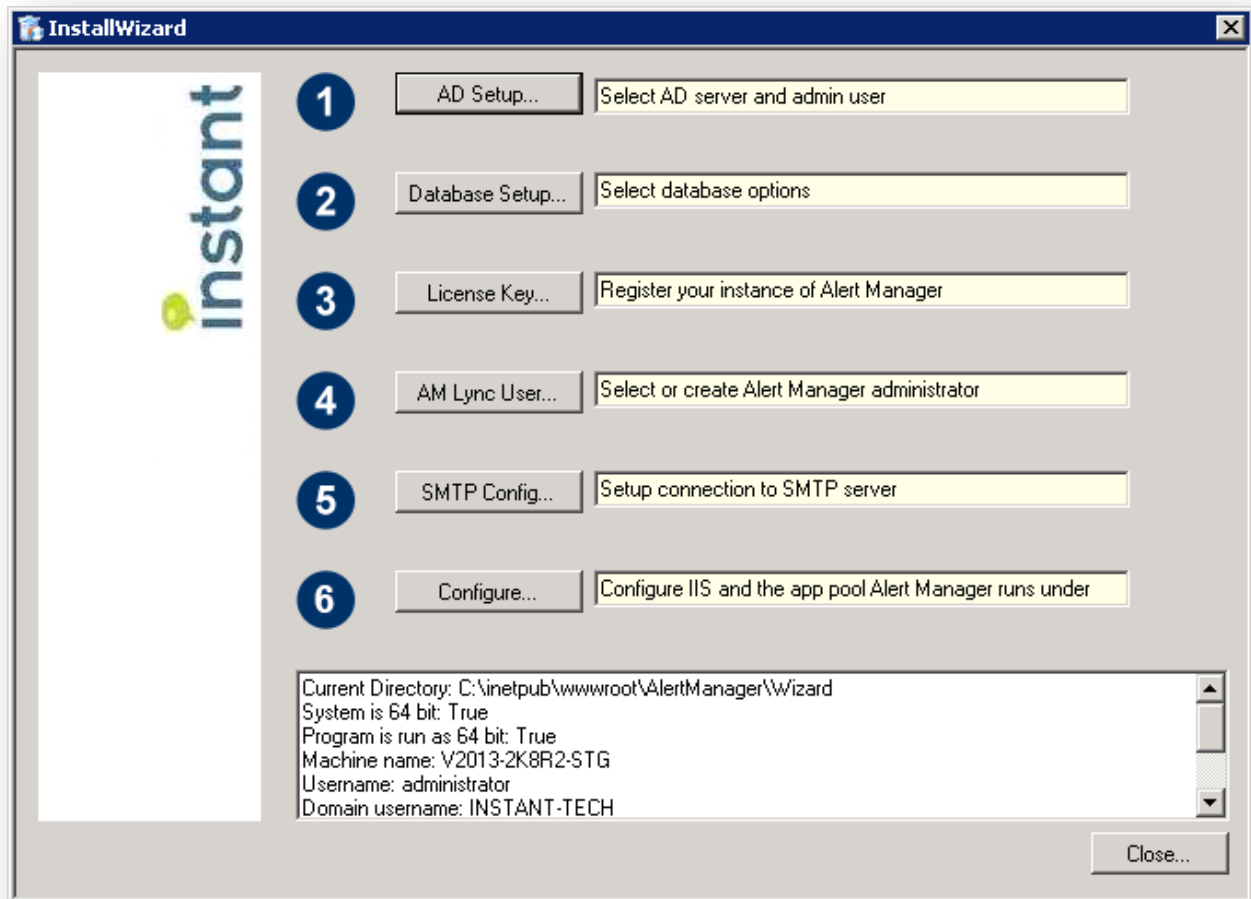


Figure 17: Alert Manager Installation Wizard



## ACTIVE DIRECTORY SETUP

1. Enter Domain Controller LDAP Path.  
*Ex: MachineName.Domain*  
Note: You do not need to enter the **LDAP://** prefix, we will enter that automatically when testing the connection
2. Provide an account for AD Lookup Login. This account is used to query Active Directory when searching for users or groups to send alerts to.
3. Provide the password for the account provided in the previous step.
4. Click **Test** to verify that the values provided will successfully connect. If the test passes, click **Save**. If the test fails, verify the values provided and retest.

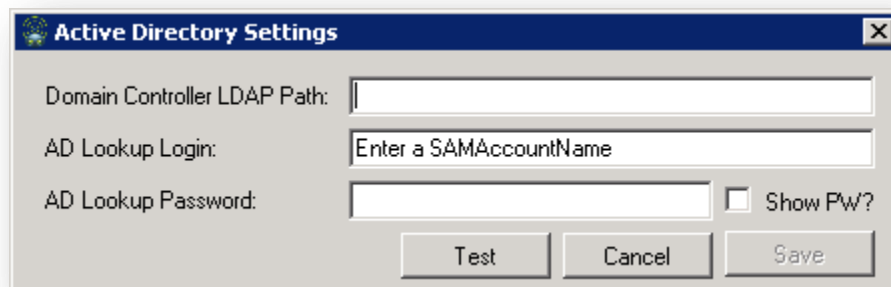


Figure 18: Active Directory Settings

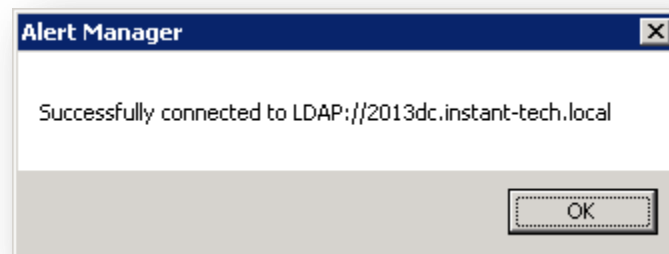


Figure 19: Successfully connected.

## DATABASE SETUP: SELECT DATABASE TYPE

1. You have two options when selecting a database type: SQLite or SQL.
  - a. SQLite is simple and requires minimal configuration. It is recommended for most deployments of Chime.
  - b. SQL Server is more complicated to configure, and is recommended for more robust, load-balanced environments.

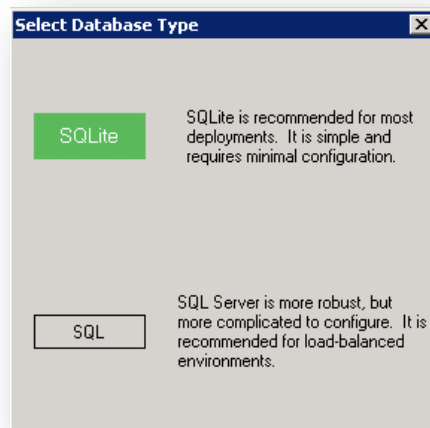


Figure 20: Select Database Type

## SQLITE

1. If using SQLite, click the SQLite button and a new database will be created automatically.

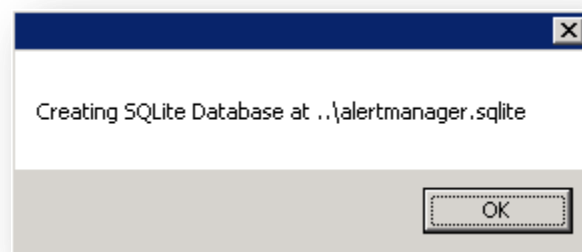
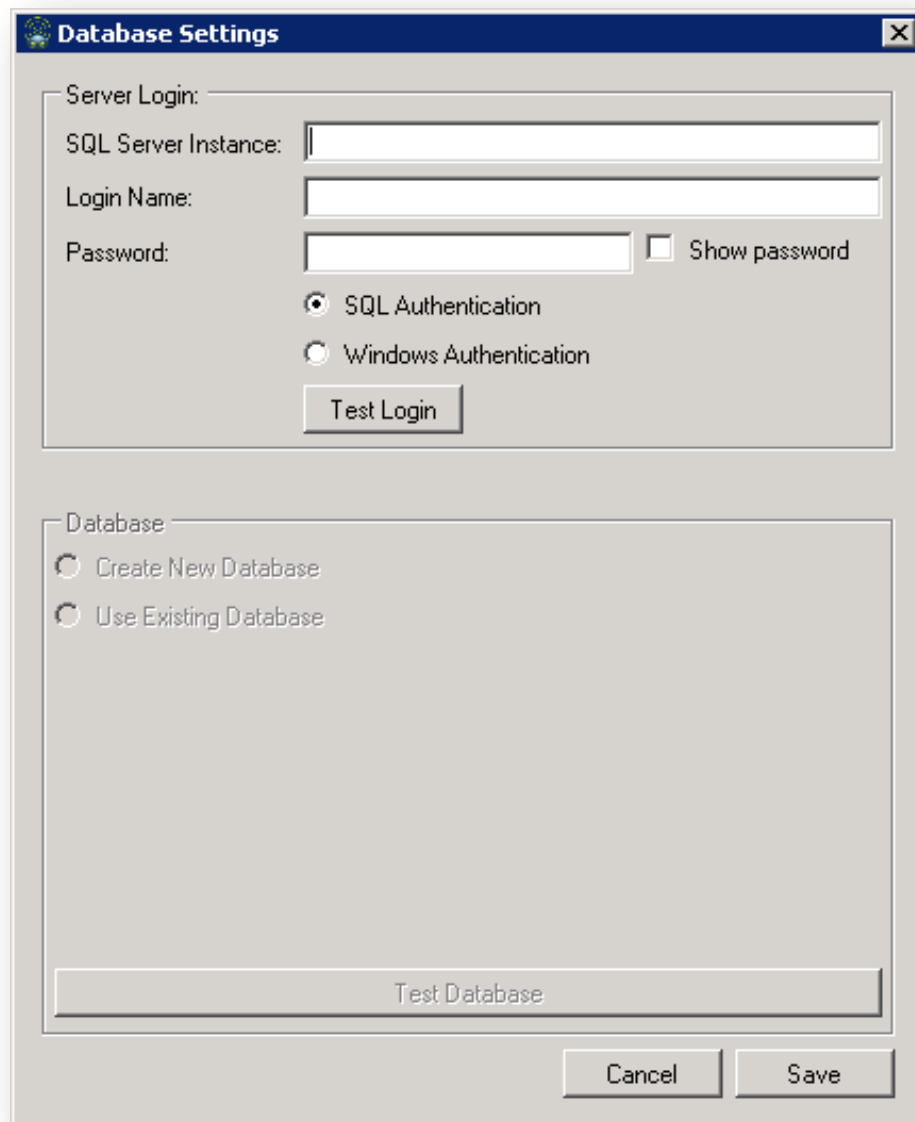


Figure 21: Create SQLite Database

## SQL DATABASE SETUP

1. If using the SQL option, specify the address for the SQL server to use.
  - a. Enter FQDN (Ex: **MachineName.Domain**)
2. Provide an account to login to the SQL server.
3. Provide password for the account provided in the previous step.
4. Click **Test Login** to verify that the values provided will successfully connect. If the test fails, verify the values provided. If the test passes, continue to the next step.



The image shows a 'Database Settings' dialog box with a blue title bar and a close button. It is divided into two main sections: 'Server Login' and 'Database'. The 'Server Login' section contains fields for 'SQL Server Instance', 'Login Name', and 'Password', along with a 'Show password' checkbox and radio buttons for 'SQL Authentication' (selected) and 'Windows Authentication'. A 'Test Login' button is at the bottom of this section. The 'Database' section has radio buttons for 'Create New Database' and 'Use Existing Database', and a 'Test Database' button at the bottom. 'Cancel' and 'Save' buttons are located at the bottom right of the dialog.

**Database Settings**

Server Login:

SQL Server Instance:

Login Name:

Password:  ☐ Show password

☒ SQL Authentication

☐ Windows Authentication

Test Login

Database:

☐ Create New Database

☐ Use Existing Database

Test Database

Cancel Save

Figure 22: Connect to SQL

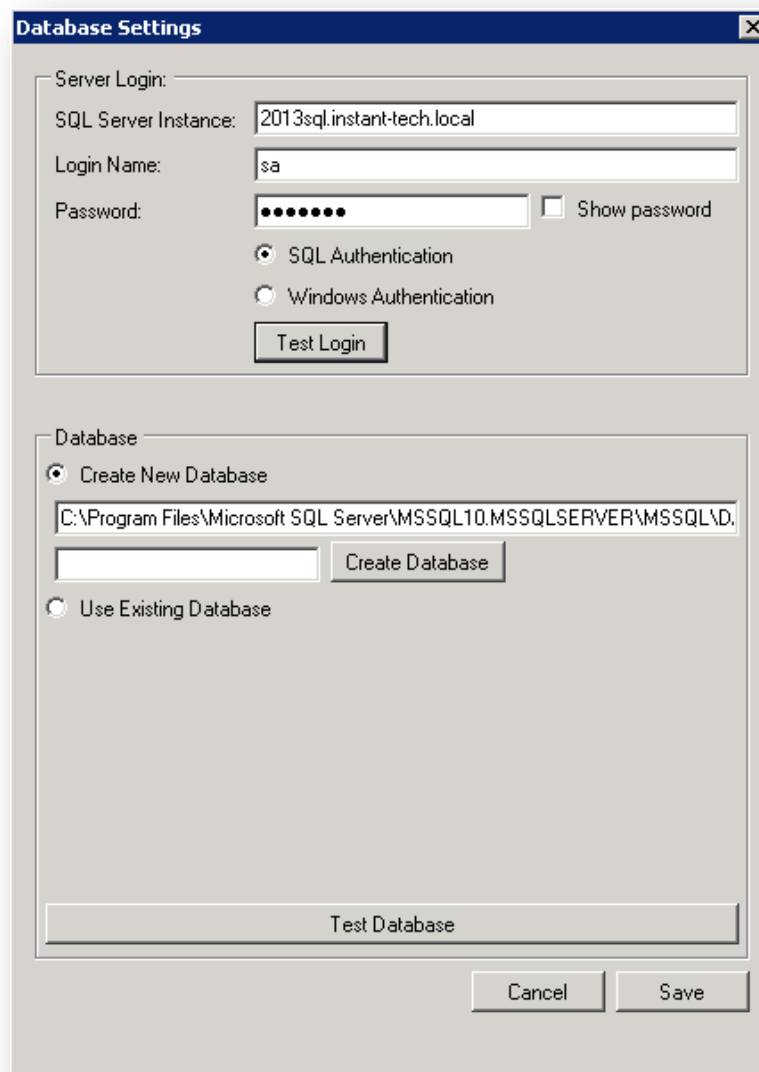
## CREATE NEW OR USE EXISTING DATABASE

You have two options when configuring the database using SQL. You can choose to create a new database, or use an existing database created during a previous installation.

### CREATE NEW DATABASE

1. Click the radio button for **Create New Database**.
2. Specify the location of the SQL instance that will be used for the new database.
3. Enter a name for the new database into the input field.

Click **Create Database**. Figure 22: Creating a new database

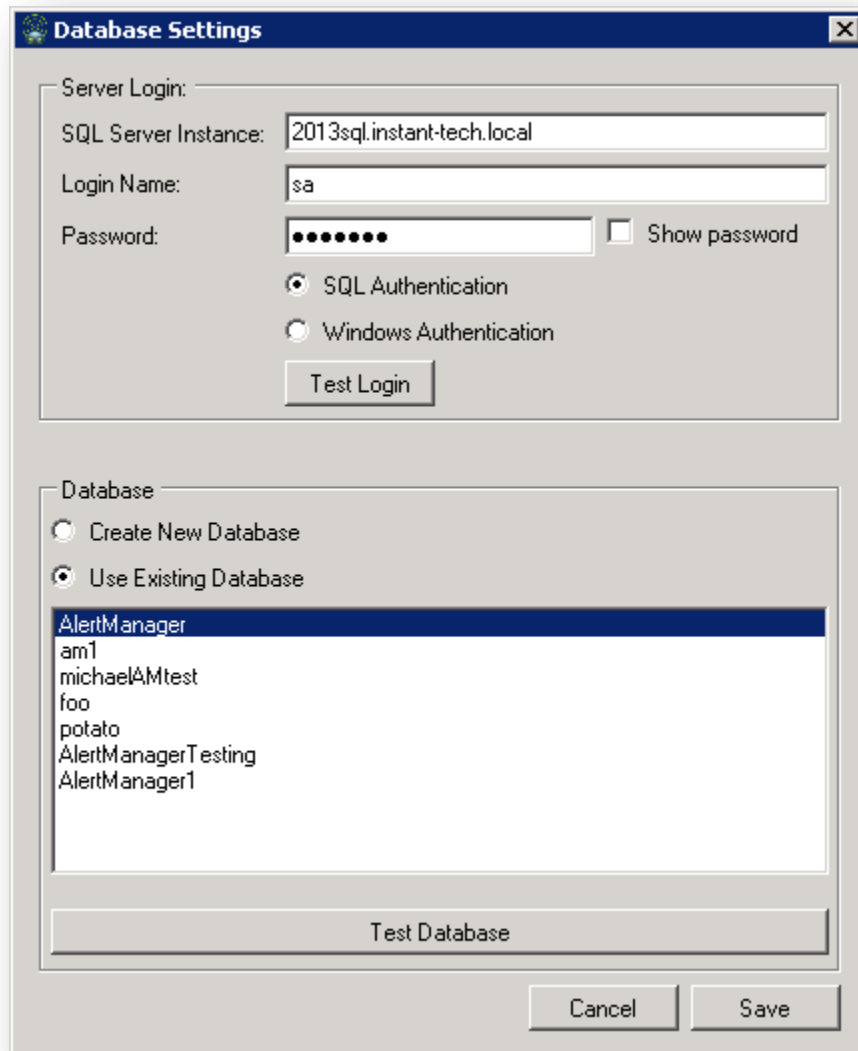


The screenshot shows the 'Database Settings' dialog box. The 'Server Login' section is at the top, with fields for 'SQL Server Instance' (2013sql.instant-tech.local), 'Login Name' (sa), and 'Password' (masked with dots). There are radio buttons for 'SQL Authentication' (selected) and 'Windows Authentication', and a 'Test Login' button. The 'Database' section below has a 'Create New Database' radio button selected. It includes a text field with the path 'C:\Program Files\Microsoft SQL Server\MSSQL10.MSSQLSERVER\MSSQL\LD...', a 'Create Database' button, and a 'Use Existing Database' radio button. At the bottom, there is a 'Test Database' button and 'Cancel' and 'Save' buttons.

Figure 23: Creating a new database

## USE EXISTING DATABASE

4. Click the radio button for **Use Existing Database**.
5. Click on the name of the database you wish to use.
6. Click **Test Database**. The wizard will verify that the application can successfully connect to the specified database.
7. Click **Save**.



The screenshot shows the 'Database Settings' dialog box. The 'Server Login' section is at the top, with fields for 'SQL Server Instance' (2013sql.instant-tech.local), 'Login Name' (sa), and 'Password' (masked with dots). There is a 'Show password' checkbox and two radio buttons for 'SQL Authentication' (selected) and 'Windows Authentication'. A 'Test Login' button is below. The 'Database' section is below, with radio buttons for 'Create New Database' and 'Use Existing Database' (selected). A list of databases is shown: AlertManager, am1, michaelAMtest, foo, potato, AlertManagerTesting, and AlertManager1. A 'Test Database' button is at the bottom of the list. At the very bottom of the dialog are 'Cancel' and 'Save' buttons.

Figure 24: Using an existing database

## LICENSE KEY

During configuration, you have the option to either enter a license key manually, or generate a one-month trial license.

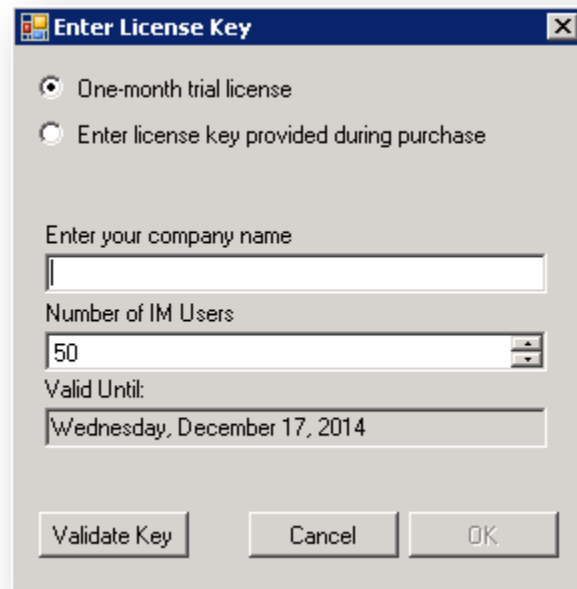


Figure 25: Enter a license key

## ENTER A LICENSE KEY

1. Click the first radio button.
2. Enter the license key that has been provided to you into the input field.
3. Click **Validate Key**. The wizard will verify that the key you have entered is valid.
4. Click **OK**.

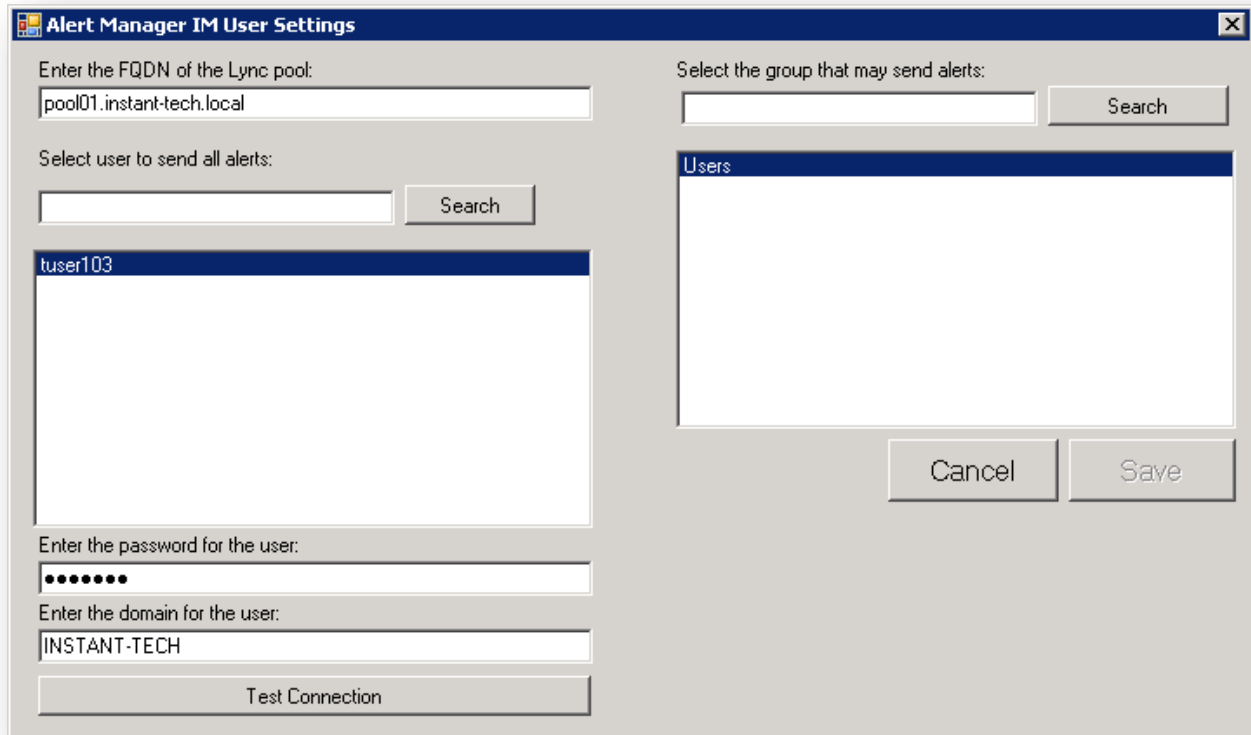
## ONE-MONTH TRIAL LICENSE

1. Click the radio button for **One-month trial license**.
2. Enter your company name into the appropriately labeled input field.
3. Enter the number of IM users you will need to dispatch to.
4. Click **Validate Key**. The wizard will verify that the key is valid.
5. Click **OK**.

## AM LYNC USER

You will need to assign a user account that the application can use to dispatch messages. It is recommended that you create a new account for this purpose.

You can later configure your message settings to inform the user who dispatched the message if desired.



The dialog box is titled "Alert Manager IM User Settings". It contains several input fields and buttons. On the left, there is a field for "Enter the FQDN of the Lync pool:" with the text "pool01.instant-tech.local". Below it is a "Select user to send all alerts:" section with a search box and a "Search" button. A list box below the search box contains the text "tuser103". At the bottom left, there are fields for "Enter the password for the user:" (masked with dots) and "Enter the domain for the user:" with the text "INSTANT-TECH". A "Test Connection" button is at the bottom. On the right, there is a "Select the group that may send alerts:" section with a search box and a "Search" button. Below this is a list box titled "Users" which is currently empty. At the bottom right, there are "Cancel" and "Save" buttons.

Figure 26: Selecting IM User Settings

## SELECT DISPATCH ACCOUNT

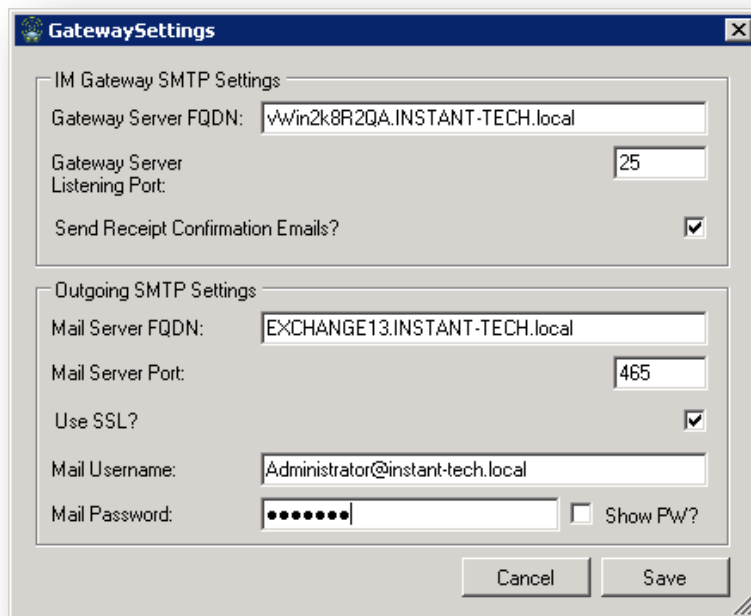
1. Enter the fully qualified domain name of the Lync pool
2. Enter the display name of the account you wish dispatch alerts.
3. Click **Search** to search the Active Directory for the account.
4. Click to select the account that you wish to use. The selected account will remain highlighted.
5. Enter the password for the chosen account.
6. Enter the domain name for the chosen account.

## SELECT GROUP TO SEND ALERTS

The application allows all members of a specified group to login to the service to send alerts. To control access, be sure that you have an Active Directory group appropriately setup to provide access to only the users who should be allowed to dispatch.

1. Enter the name of the Active Directory group in the input field.
2. Click **Search** to search the Active Directory for this group.
3. Click the name of the group you wish to use. The selected account will remain highlighted.
4. Click **Save** to save these settings.

## SMTP CONFIG



The screenshot shows a Windows-style dialog box titled "GatewaySettings". It contains two main sections: "IM Gateway SMTP Settings" and "Outgoing SMTP Settings".

**IM Gateway SMTP Settings:**

- Gateway Server FQDN:
- Gateway Server Listening Port:
- Send Receipt Confirmation Emails? ☒

**Outgoing SMTP Settings:**

- Mail Server FQDN:
- Mail Server Port:
- Use SSL? ☒
- Mail Username:
- Mail Password:  ☐ Show PW?

At the bottom right, there are "Cancel" and "Save" buttons.

Figure 27: Email Gateway Settings



## IM GATEWAY SMTP SETTINGS

This sets up the listening service for the Email-to-IM Gateway. These fields should automatically populate with the default settings. You will also need to create a new **.im** subdomain in order for the gateway to work.

1. Enter the Gateway (Alert Manager) Server FQDN into the appropriate field.
2. Specify the Gateway (Alert Manager) Server listening port.
3. Check or uncheck the checkbox to send receipt confirmation emails. If this box is checked, you must complete the next section of the form in order to dispatch the messages.

After completing the installation wizard, ensure that you have opened the gateway server listening port (default 25) on your server's firewall.

## OUTGOING SMTP SETTINGS

These settings are used by the application to dispatch confirmation emails if you have selected to send the receipt confirmation emails.

The Outgoing SMTP Settings should be configured with the connection info for your current Exchange or SMTP server.

1. Enter the outgoing mail server FQDN into the appropriate field.
2. Specify the mail server port.
3. Check the box to use SSL if so desired.
4. Specify a username for the
5. Specify a password.
6. Click **Save** to apply the settings.

## CONFIGURE IIS

This step ensures that the IIS settings for this application are correct.

1. Click **Test Settings** to perform a check of the current IIS settings.
2. Click **Autoconfigure** to have the application configure the settings to be correct, or manually change the settings using the Server Manager.
3. Click **OK** to complete this step.

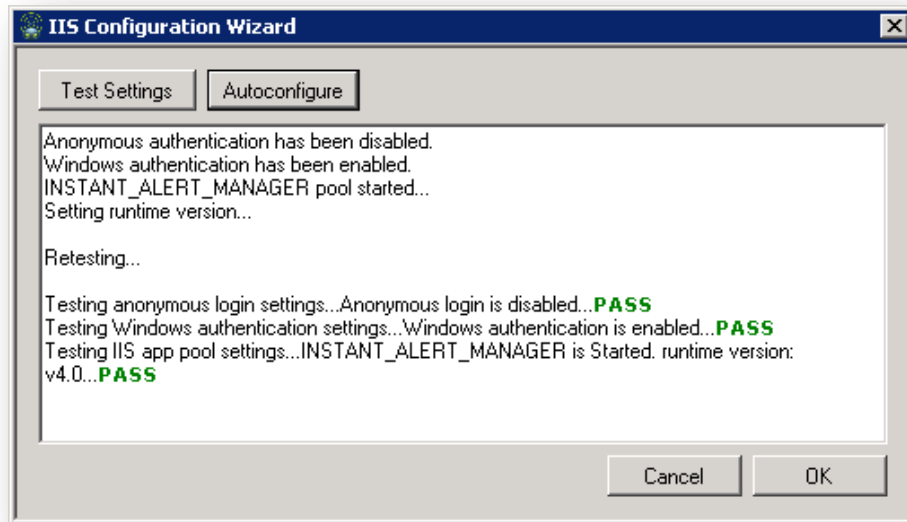


Figure 28: IIS Configuration Wizard

## CONFIGURE GATEWAY FOR USE

You can configure the Email-to-IM Gateway for use with Microsoft Exchange, or any other SMTP server your organization is using.

For an SMTP server, follow the **Create .IM Subdomain** instructions.

For a Microsoft Exchange server, follow the **Configure Exchange Send Connector** instructions.

### CREATE .IM SUBDOMAIN

In order for email messages to be correctly dispatched to Lync users, it is necessary to create an MX Record for the IM Gateway.

1. Login to the Domain Controller.
2. Open the **DNS Manager**.
3. Expand the proper domain controller node. Underneath there should be a node name **Forward Lookup Zones**. Underneath this you will find a list of domains. Select the domain corresponding to the email domain that you would like to use the IM Gateway to IM-enable.

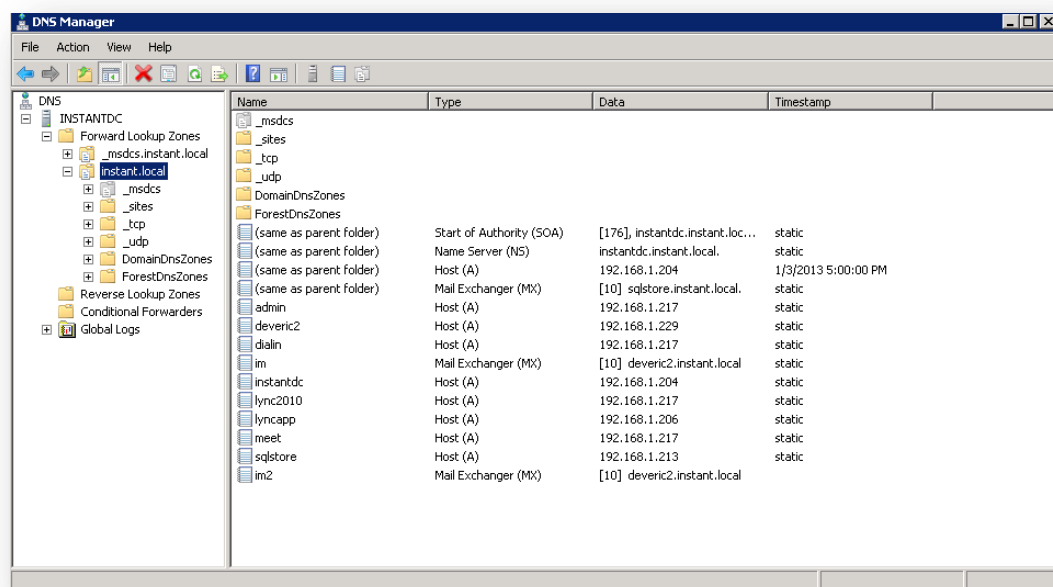


Figure 29: DNS Manager

4. Right-click in the main pane and select **New Mail Exchanger (MX)...** In the child domain input, enter **im**. Thus, if the parent domain is **contoso.com**, the second input should then read **im.contoso.com**. Enter the FQDN of the server which will run the IM Gateway in the third input (the Alert Manager server). Leave the priority field at the default.

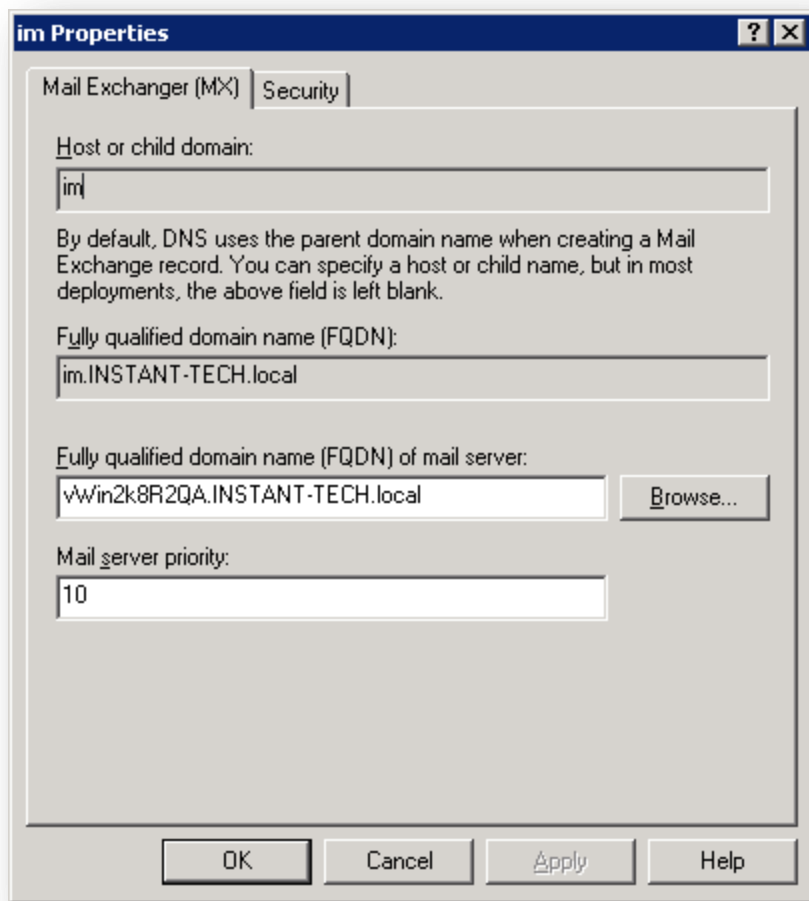


Figure 30: IM Subdomain Record

With the new MX record in place, emails addressed to the new **im.domain** will now be routed to the IM Gateway server.

## CONFIGURE EXCHANGE SEND CONNECTOR (EXCHANGE SERVER 2013)

1. Access the Exchange Server Management Console using a supported browser (<SERVERADDRESS>/ecp).
2. Click on the **mail flow** option on the left side of the screen.
3. Click **accepted domains**.
4. Click the **+** icon to add a new accepted domain.

## ADDING AN ACCEPTED DOMAIN

The new accepted domain will serve as a subdomain to route email messages to IM users. We recommend creating an **IM** subdomain. Prepending this new subdomain to email messages will allow these messages to be routed through the Alert Manager system.

Ex: [user@im.domain.com](mailto:user@im.domain.com)

1. Provide a display name for the new domain
2. Create a new accepted domain (EX: **im.instant-tech.local**)
3. Choose the option for an **Internal relay domain**.
4. Click **save** to save the new settings.

Accepted Domain - Windows Internet Explorer

https://192.168.1.213/ecp/AcceptedDomain/NewAcceptedDomain.aspx?pwdcid=6&ReturnObjectType=1 Certificate error

new accepted domain [Help](#)

Accepted domains are used to define which domains will be accepted for inbound email routing.

\*Name:  
IM Gateway

\*Accepted domain:  
im.instant-tech.local

This accepted domain is:

☒ Authoritative domain. Email is delivered to a recipient in this Exchange organization.

☐ Internal relay domain. Email is delivered to recipients in this Exchange organization or relayed to an email server outside this organization.

☐ External Relay Domain. Email is relayed to an email server outside this Exchange organization.

save cancel

105%

Figure 31: Create a new accepted domain

## CONFIGURE SEND CONNECTOR

1. Click **send connectors**.
2. Click the **+** to create a new send connector.
3. Enter a descriptive name for the new connector (Ex: IM Gateway).
4. Choose the option for **Custom**.

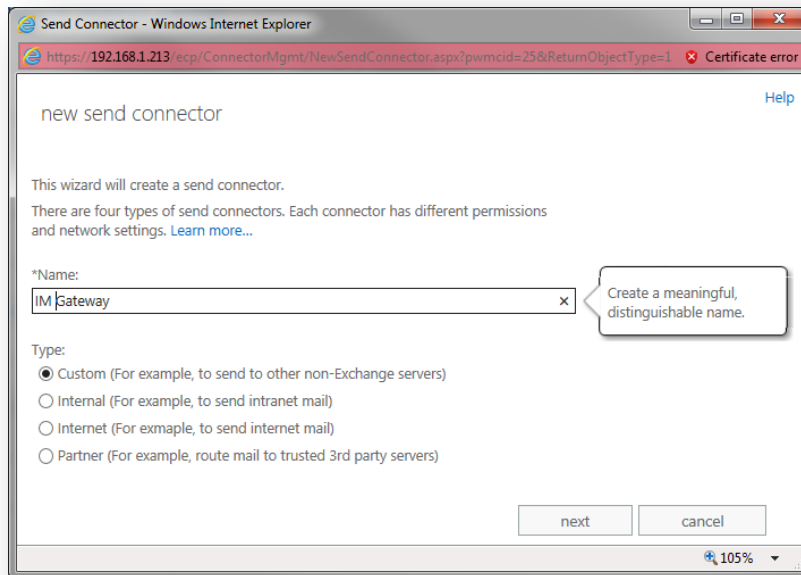


Figure 32: Name the new send connector

5. Click **next**.
6. Choose the option to **Route mail through smart hosts**.
7. Click **+** to add a new smart host.
8. Enter the FQDN of the server hosting Alert Manager in the field.

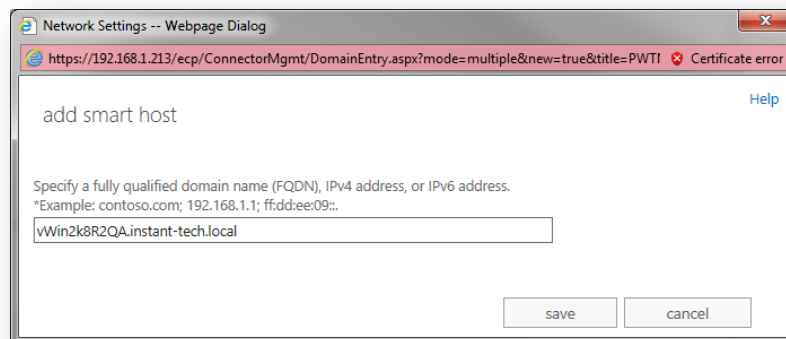


Figure 33: Add a smart host

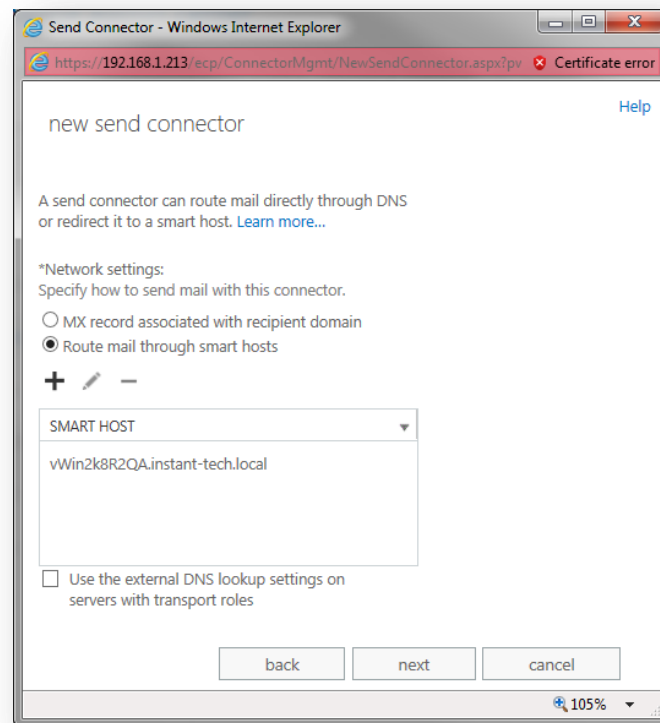


Figure 34: Send mail through a smart host

9. Click **next**.
10. Leave the default option of **none** selected for Smart host authentication.
11. Click **next**.
12. Click the **+** to specify an address space to use for this connector.
13. Leave the default type of **SMTP**.
14. Enter the FQDN of the new accepted domain created earlier (EX: im.instant-tech.local).
15. Leave the default cost **1**.
16. Click **save**.

Address Space -- Webpage Dialog

https://192.168.1.213/ecp/ConnectorMgmt/AddressSpaceEntry.aspx?mode=multi&new=true&ti Certificate error

add domain

\*Type:  
SMTP

\*Full Qualified Domain Name (FQDN):  
im.instant-tech.local

\*Cost:  
1

save cancel

Figure 35: Add an address space

17. Click **next**.

Send Connector - Windows Internet Explorer

https://192.168.1.213/ecp/ConnectorMgmt/NewSendConnector.aspx?pv Certificate error

new send connector Help

A send connector routes mail to a specified list of domains. These domains can be SMTP address space or a custom type. [Learn more...](#)

\*Address space:  
Specify the address space or spaces to which this connector will route mail.

+ ✎ -

TYPE	DOMAIN	COST
SMTP	im.instant-tech.local	1

☐ Scoped send connector

back next cancel

105%

Figure 36: Address space specified

18. Click the **+** to associate a source server.

19. Select the appropriate exchange server, and click the **add** button.



20. Click **ok** to save the selection.

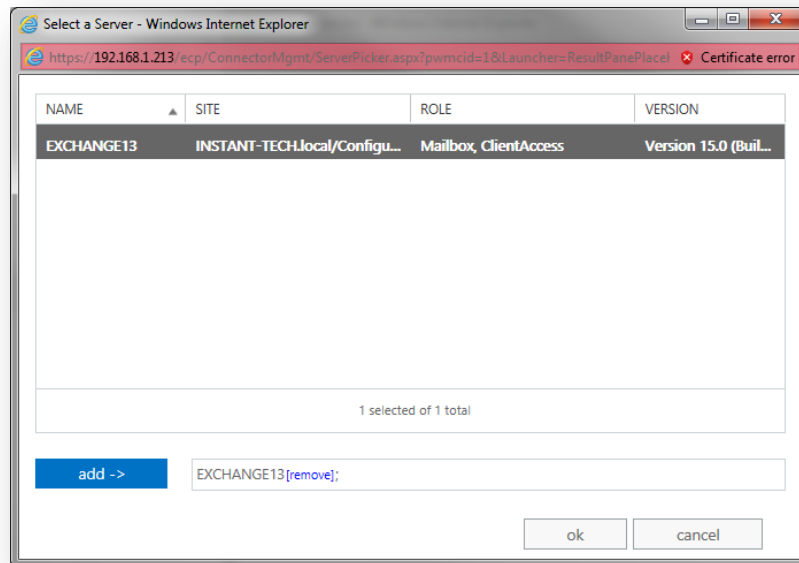


Figure 37: Select a mail server

21. Click **finish** to complete the creation of the new send connector.

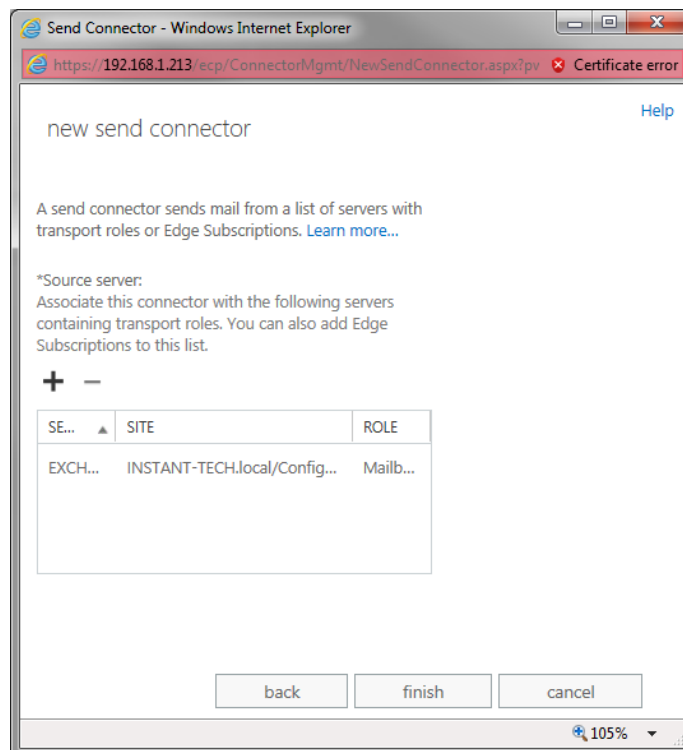


Figure 38: Finish send connector setup

## ENABLING PERSISTENT CHAT ROOMS FOR USE WITH INSTANT ALERT MANAGER

To enable a Lync persistent chat room for receiving alerts from Instant Alert Manager, it is necessary to create an Active Directory Contact object for the chat room on your domain controller.

1. On your domain controller, open **Active Directory Users and Computers**, and navigate to the OU that you would like to add the chat room in. If you do not have specific OUs, then you will want to navigate to **Users**.

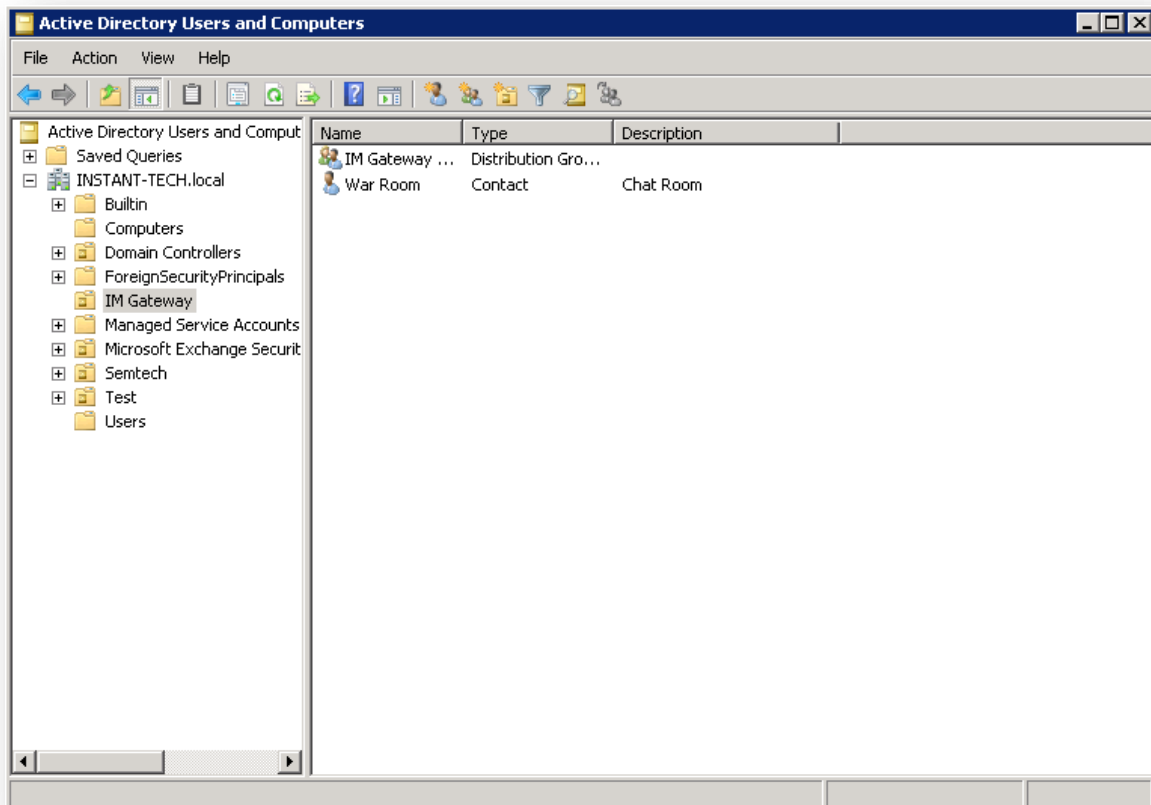
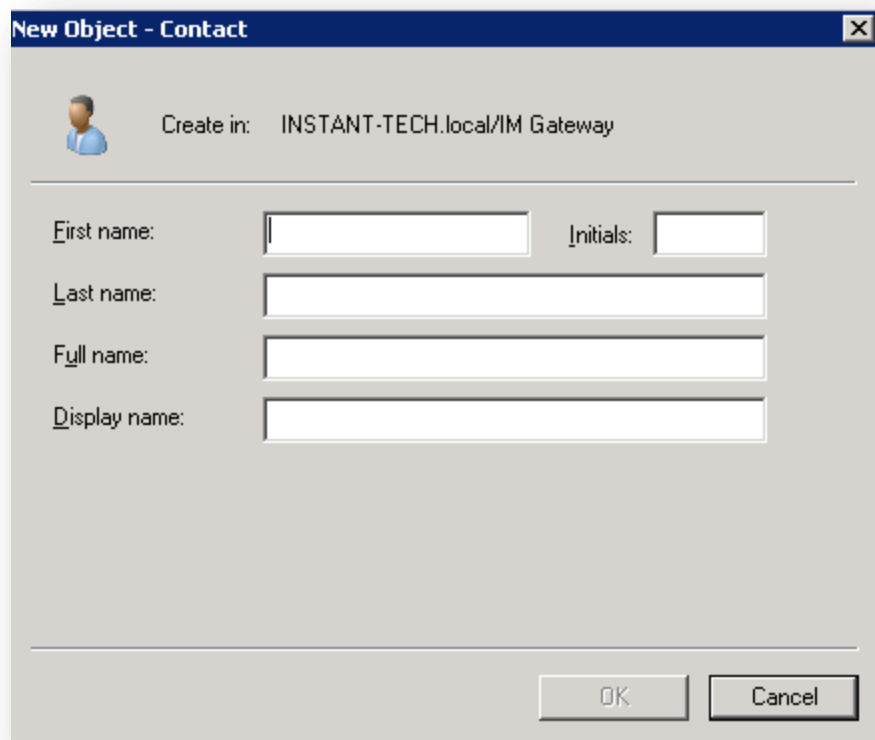


Figure 39: Active Directory

2. Right-click in the right panel, and from the context menu that appears select **New->Contact**. You should see the dialog below pop up.



New Object - Contact

Create in: INSTANT-TECH.local/IM Gateway

First name:  Initials:

Last name:

Full name:

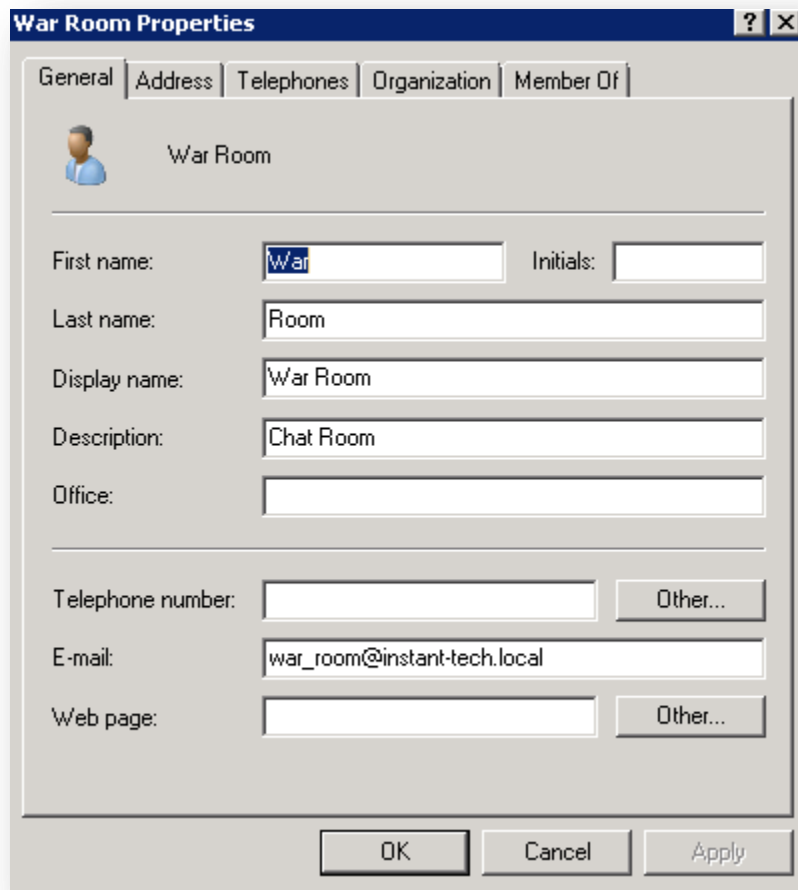
Display name:

OK Cancel

Figure 40: Create a new contact

3. Under **Display Name**, enter the name of the persistent chat room, as it is displayed in the Lync Client. Enter the same value, or any identification of your choice for the **Full Name** (This value is not used by AlertManager, but must be filled out to create the AD object). Click **OK** to create the new contact object.

4. Double-click on the newly created contact object in the right pane of the **Active Directories Users and Computers** dialog. This will open the properties dialog for the new contact object.



The screenshot shows a Windows-style dialog box titled "War Room Properties". It has several tabs: "General", "Address", "Telephones", "Organization", and "Member Of". The "General" tab is active. At the top, there is a small icon of a person and the text "War Room". Below this, there are several text input fields: "First name:" with "War" entered, "Last name:" with "Room" entered, "Display name:" with "War Room" entered, "Description:" with "Chat Room" entered, and "Office:" which is empty. Below these are fields for "Telephone number:", "E-mail:", and "Web page:". The "E-mail:" field contains "war\_room@instant-tech.local". There are "Other..." buttons next to the "Telephone number:" and "Web page:" fields. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Apply".

Figure 41: Chat Room Properties

5. In the **Description** field, enter the words "**Chat Room**". This indicates to the AlertManager service that this contact object represents a chat room; if you have other Contact objects without this description, AlertManager will not consider them when searching for Chat rooms or resolving addresses.
6. If you would like to enable the chat room for dispatching via email using the Email-to-IM Gateway feature, provide an email address for the contact object in the **E-mail** field. This email address does not need to have an actual Exchange mailbox associated with it.
7. Click **OK** to save the contact object. You should now be able to lookup the newly enabled chat room when sending an alert via the AlertManager web UI, or by sending an email to [chatEmailName@im.chatRoomEmailDomain](mailto:chatEmailName@im.chatRoomEmailDomain) via the IM Gateway. (In this example, *chatRoomEmailName* would be **war\_room** and *chatRoomEmailDomain* would be **instant-tech.local**, thus to send to this chat room, you would email **war\_room@im.instant-tech.local**.)

## USING THE GATEWAY

### SENDING AN EMAIL TO A CHAT ROOM

To send a message to a chat room using the Instant IM Gateway, simply compose an email to the address defined for the chat room, with the (**im.**) subdomain prepended to the domain. For instance, in the screen shot below, a message is being sent to the Microsoft Development chat room, which is defined in AD as [microsoft\\_development@instant.local](mailto:microsoft_development@instant.local). The (**im.**) subdomain is essential to ensure that the message is correctly routed to the IM Gateway server, rather than the normal mail server. In the following example, the 'To' address of the email is: [microsoft\\_development@im.instant.local](mailto:microsoft_development@im.instant.local).

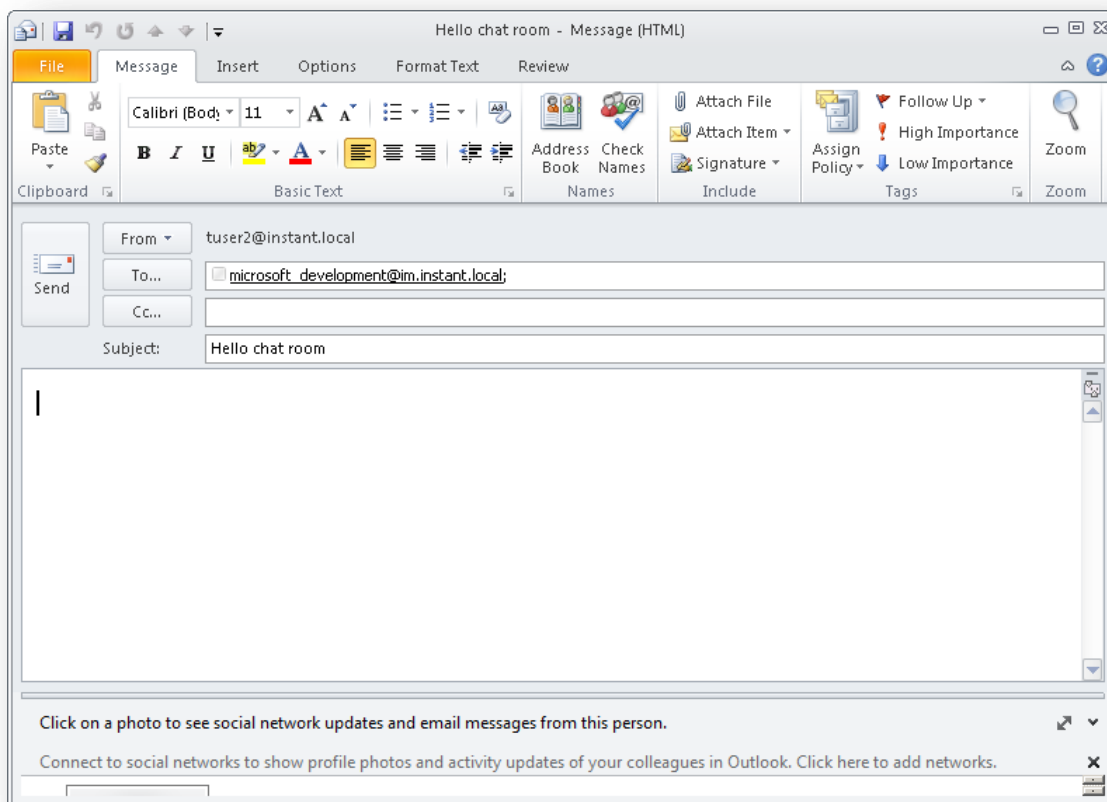


Figure 42: Sending an email through the Gateway

You have three options when sending a message to a chat room through the IM Gateway.

- 1.) A message with a subject, but no body, will appear in the chat room as a single line of text.
- 2.) A message with a body and no subject will also appear as a single line of text, unless the body text exceeds the max length limit of the chat client. If this limit is exceeded, the chat will be converted to a story.

- 3.) A message with subject and body will be displayed as a story, with the subject of the mail as the subject of the story.

*NOTE: When possible, emails should be sent as plain-text, not as HTML. The IM Gateway currently supports HTML formatted email, but HTML is not rendered with the Lync 2010 Group Chat room. Therefore, the IM Gateway will attempt parse the HTML contained within an email into a format suitable for the Lync 2010 Chat Room.*

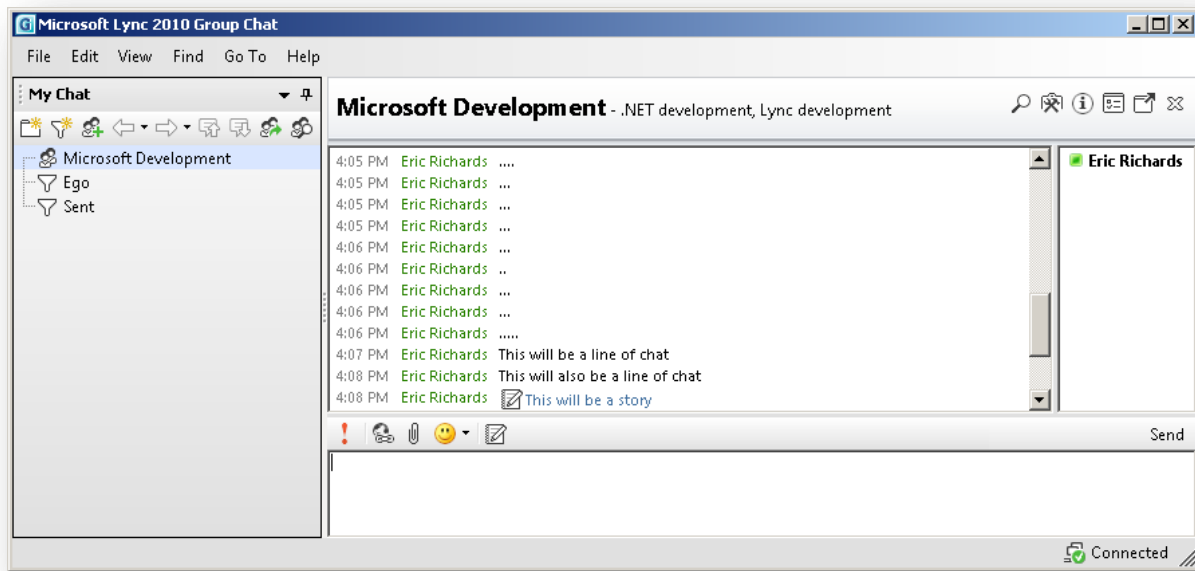


Figure 43: Message delivered to group chat room

The following screen shot demonstrates how a message will be displayed in the Group Chat room when the message is consolidated to a Group Chat story:

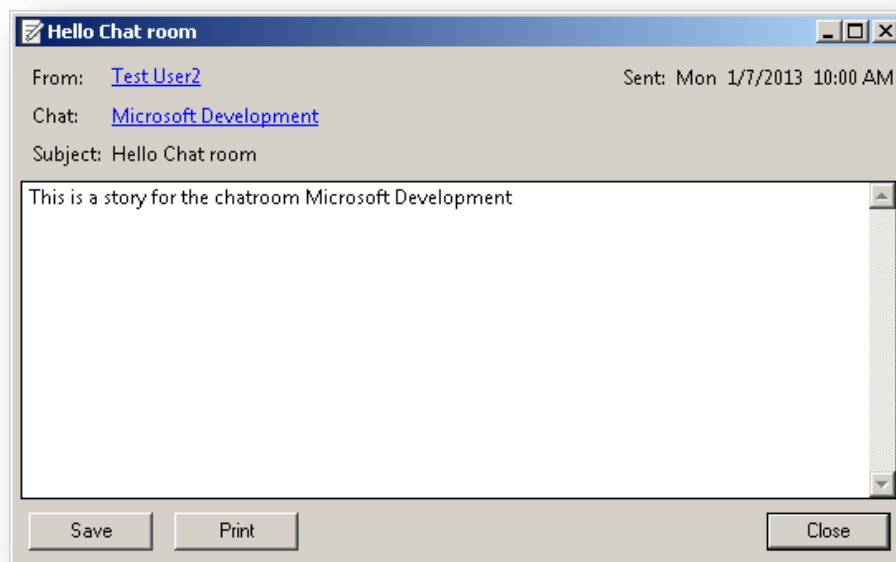


Figure 44: Message displayed as a story

In the event that an email contains a significant amount of information, then the email message will automatically be split into different 'stories' and placed into the Lync Group Chat room as a collection of 'parts'. For example, the following screen shot demonstrates several emails that have been submitted to the chat room and they have been split across a collection of story segments:

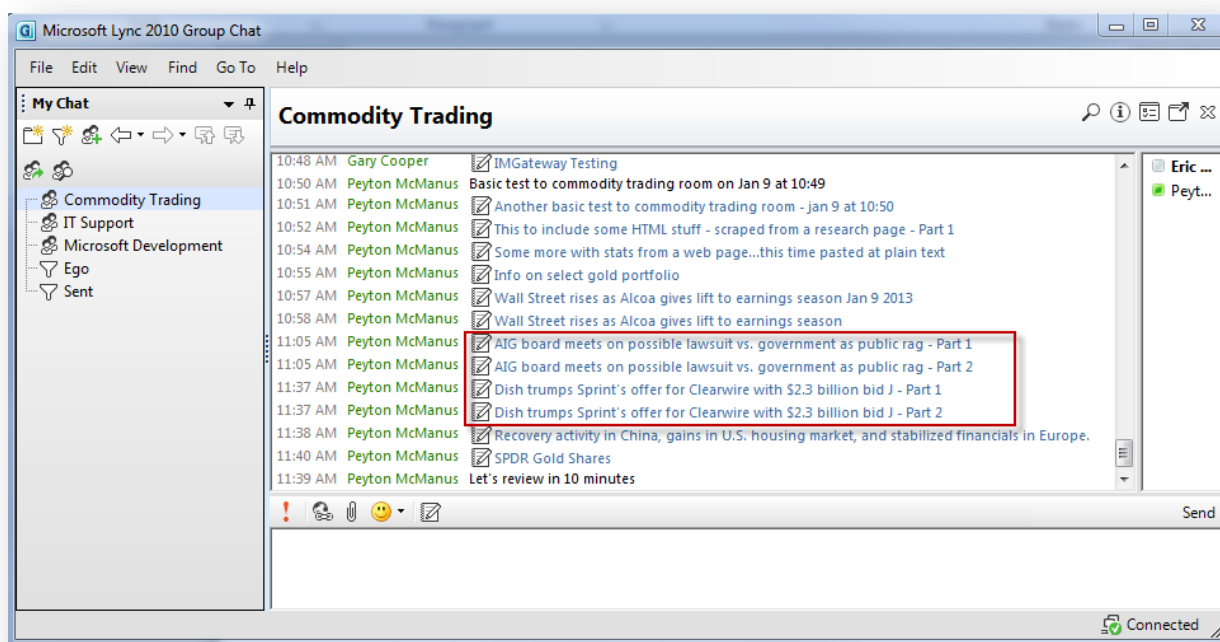


Figure 45: Large message split up into multiple stories

## SENDING EMAIL WITH IMPORTANCE TO CHAT ROOM

By default, the gateway supports the ability to convert emails marked with 'importance' to a similar message in the Lync Group Chat room. So, if an email is marked as important, the message will be dispatched to the chat room and flagged as important.

## SENDING EMAIL WITH ATTACHMENTS

The gateway supports the ability to receive emails with attachments and the application will automatically post attachments to the designated Microsoft Lync Group Chat room. Currently the gateway does not support the ability to distribute attachments to individuals via the Lync IM protocol.

The following screen shots demonstrate sending an email with either one, or multiple attachments, to a Group Chat room.

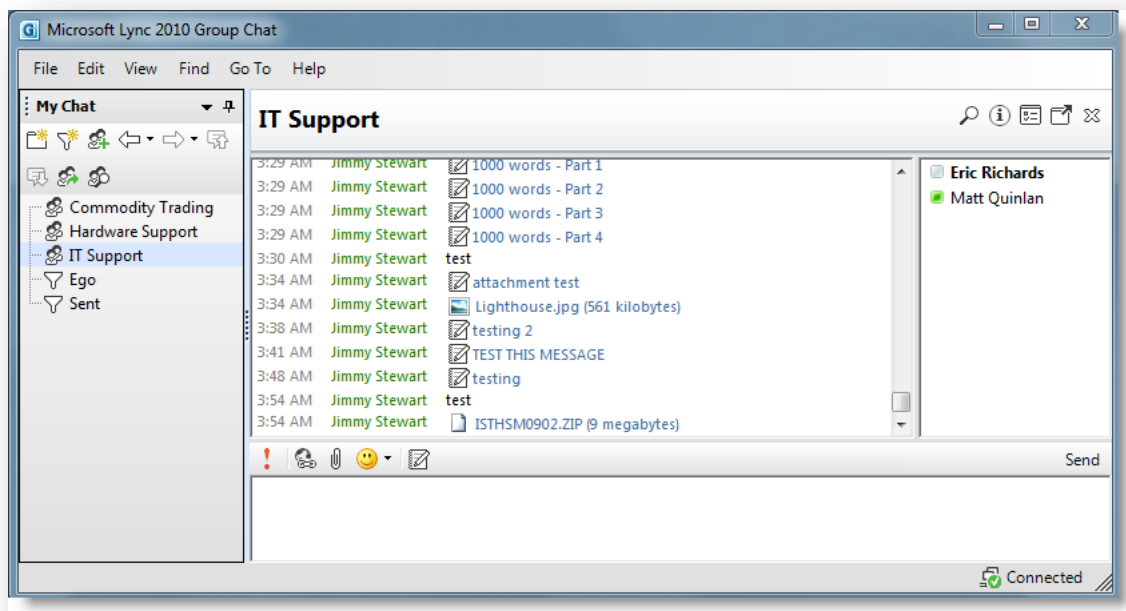


Figure 46: Attachments delivered to the chat room

By default, the Lync Group Chat room may provide specific 'hover' behavior for certain types of files. For example, the following screen shot demonstrates how an image might be rendered via a hover action:



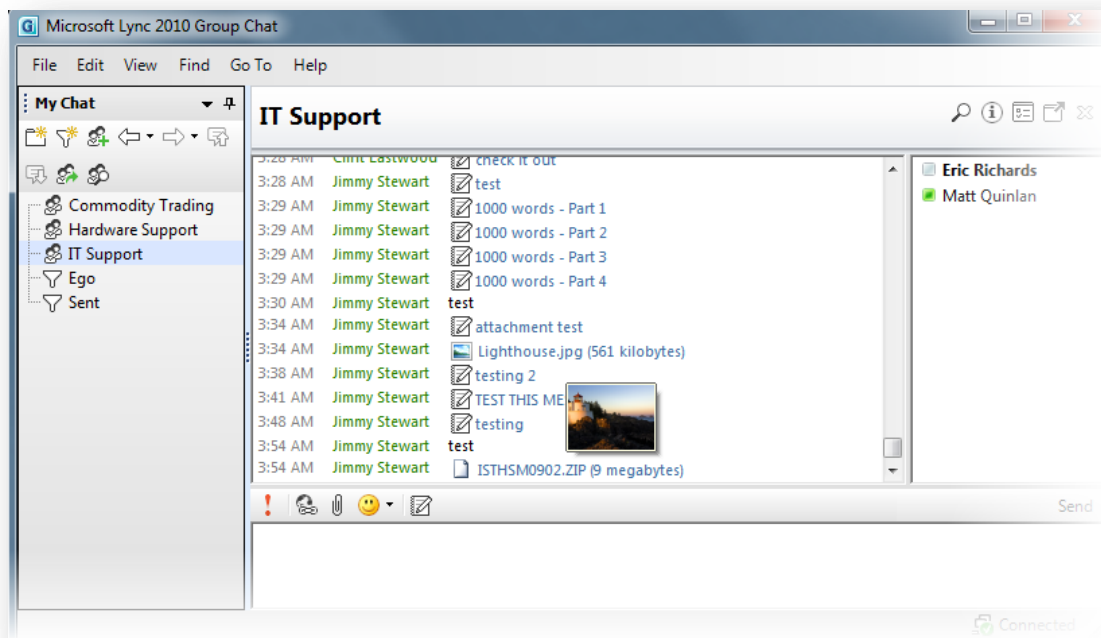


Figure 47: Pictures delivered to a chat room

## SENDING EMAILS WITH URL LINK(S)

It is also possible to send an email to a chat room that contains hyperlinks. In many cases, the IM Gateway server will attempt to map hyperlinks to the appropriate structure within the Lync Group Chat room. The Lync Group Chat room will display the link as 'clickable' and the link will be represented with a story structure. In many cases, the IM Gateway will attempt to parse the email message and identify the various 'link' references. In order to explicitly indicate a link, please surround the link with the < > characters.

The following screen shot demonstrates how to send a clickable link to the chat room – this is accomplished by enclosing the link URL with <> characters.

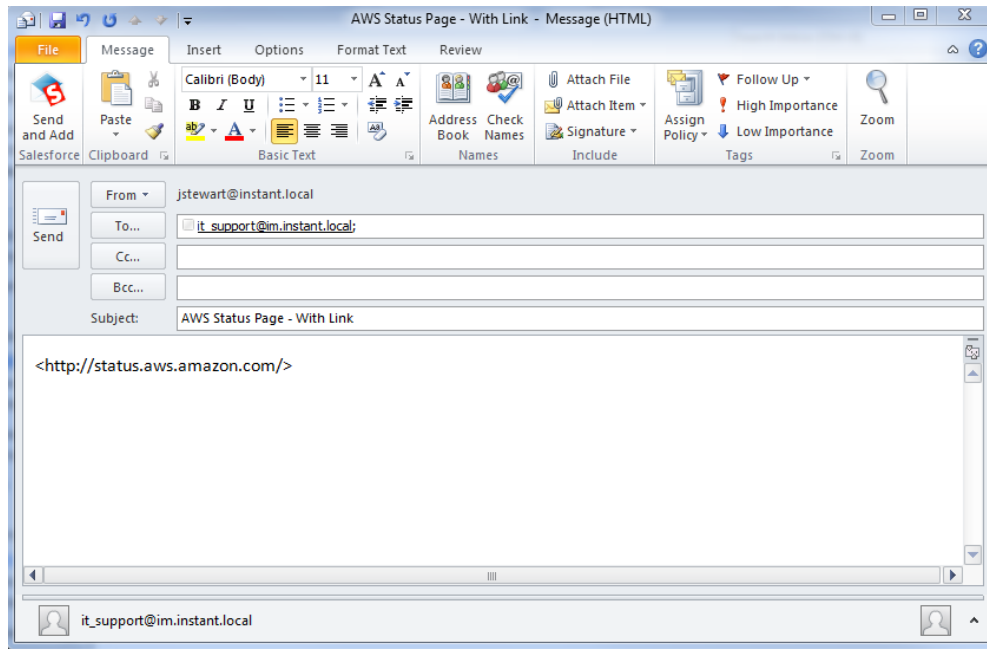


Figure 48: Sending a link in a message

The following screen shot demonstrates how the message will be displayed in the IT Support group chat room:

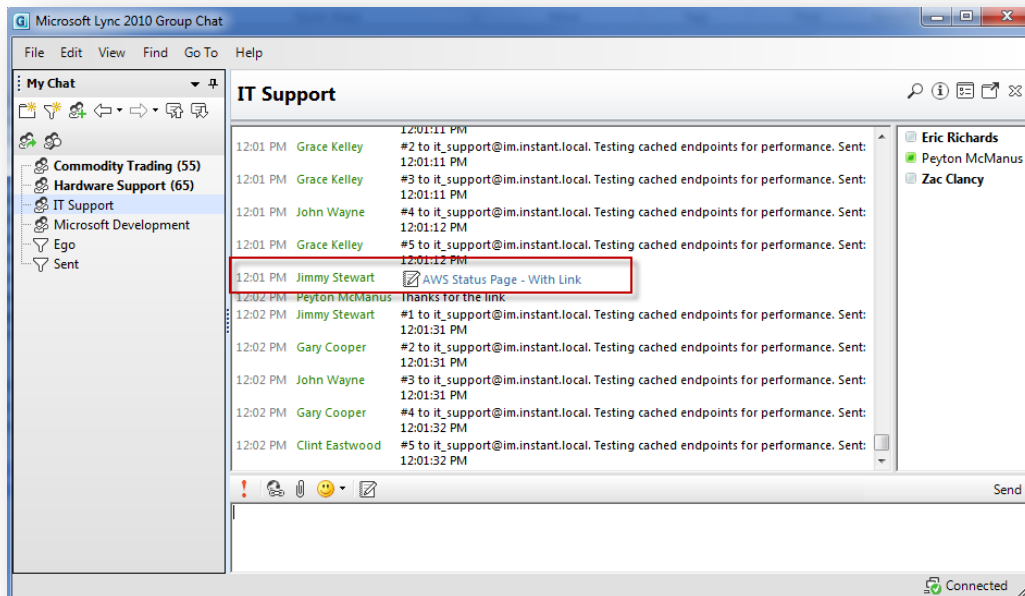


Figure 49: Link formatted in chat

When the story is expanded, or read, then the link will appear as a clickable entity:

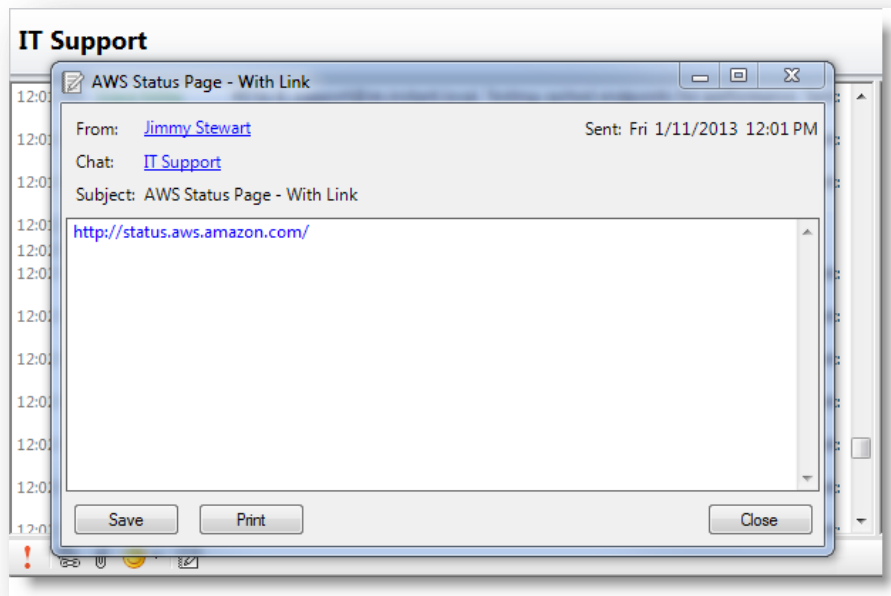


Figure 50: Link displayed in a story

## SENDING AN IM TO A USER BY EMAIL

You may send an IM to a user via email with the IM Gateway by composing an email to the user's normal email address, and then prepending the (**im.**) subdomain to the domain portion of the address.

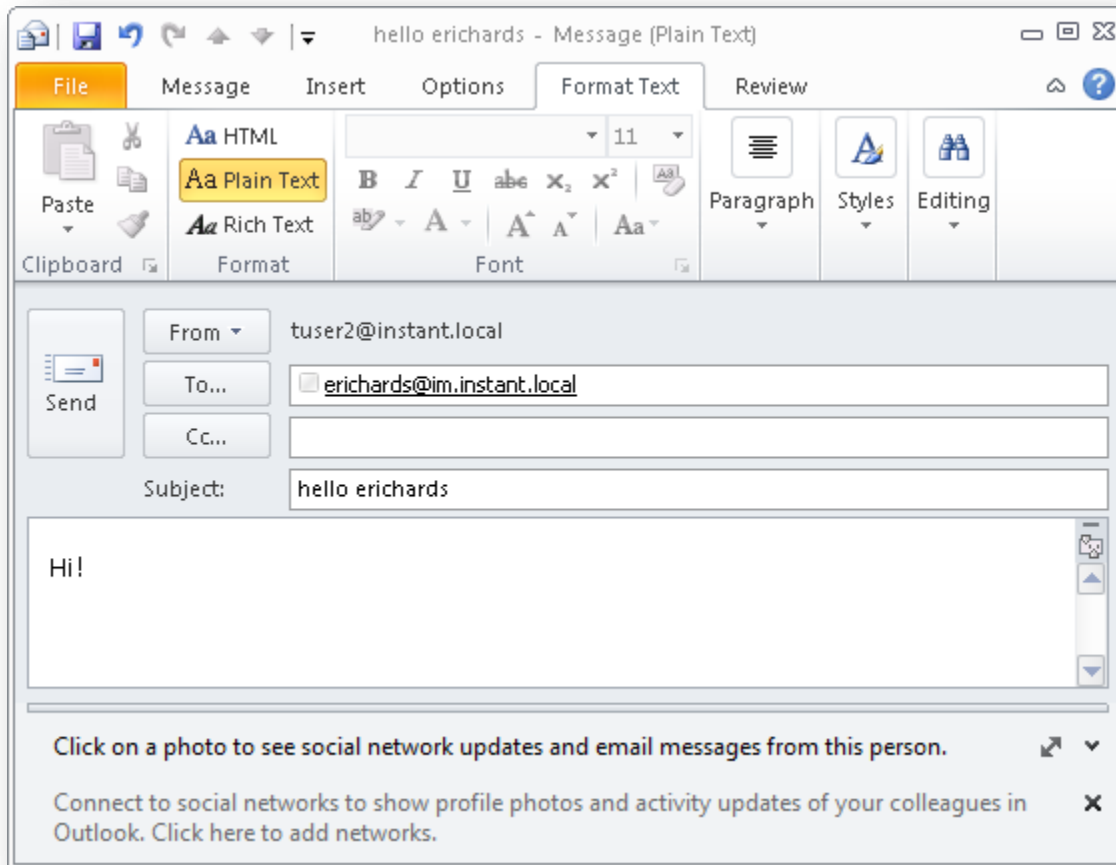


Figure 51: Sending an message to a user

In this example, the following IM will be sent to the user with the email address: [erichards@im.instant.local](mailto:erichards@im.instant.local). In this example, the IM Gateway server will receive the email (since the subdomain [im.instant.local](mailto:im.instant.local) was provided) and then the email will be converted to an IM message and dispatched, using the user's SIPURI, to the user in Active Directory who matches the user [erichards@instant.local](mailto:erichards@instant.local).

These IM alerts are entirely one-way; responses to the messages will not be delivered to the sender of the alert, and if a recipient attempts to reply, they will receive notification that their response will not be delivered.

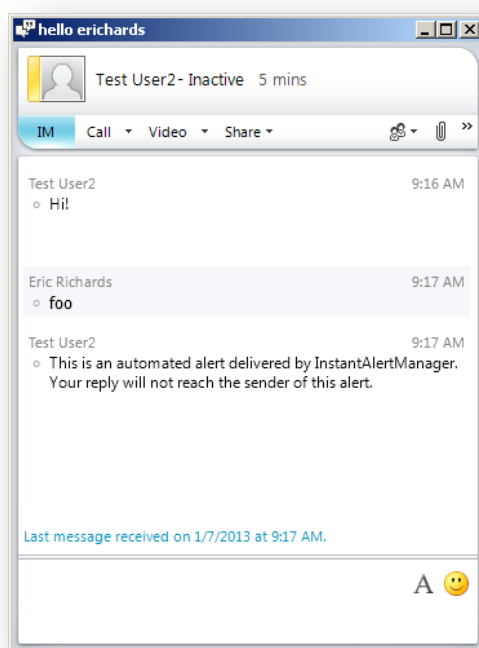


Figure 52: Message delivered to user

## SENDING AN IM TO A GROUP OF USERS

In addition to sending an email, and thus an IM, to an individual user, the Instant IM Gateway has the ability to dispatch messages to standard Microsoft Exchange distribution groups. So, the Instant IM Gateway will expand the distribution list, stage the IM messages, and distribute the IM messages to all users within the distribution group.

Distribution lists composed of Lync Group Chat rooms are not supported. In order to send a message to multiple Lync Group Chat rooms, the rooms should be specified as unique email addresses in the email message.

## SENDING IM MESSAGES ON BEHALF OF THE SENDER

By default, the IM Gateway application will send messages, both to individuals and to the Microsoft Lync Group Chat rooms, on behalf of the user who originally sent the email. In order to accomplish this behavior, the IM Gateway server will impersonate the specified user (the person who originally sent the email) via a login to the Microsoft Lync server. This login will take place using the Microsoft Lync trusted application pool. So, as IM messages are dispatched to both individuals and Group Chat rooms, they will appear to originate from the original email 'sender'.

## EMAIL RESPONSE TO SENDER

The IM Gateway will automatically acknowledge each email request by providing a return email notification to the original email sender. This email acknowledgement will include information on the status of the request and whether or not the user's SIPURI was located.

The following return receipt indicates that the participant of the original message was located:



Figure 53: Delivery receipt dispatched by the gateway

If the designated person was not located (i.e. their email address did not resolve against a user in Active Directory and the system was not able to determine a SIPURI in Active Directory), then an email message will be returned indicating that the user was not located in the directory.

For example, the following screen shot demonstrates an email message that is returned from the IM Gateway server if the recipient is not located (i.e. their SIPURI was not located in Active Directory):

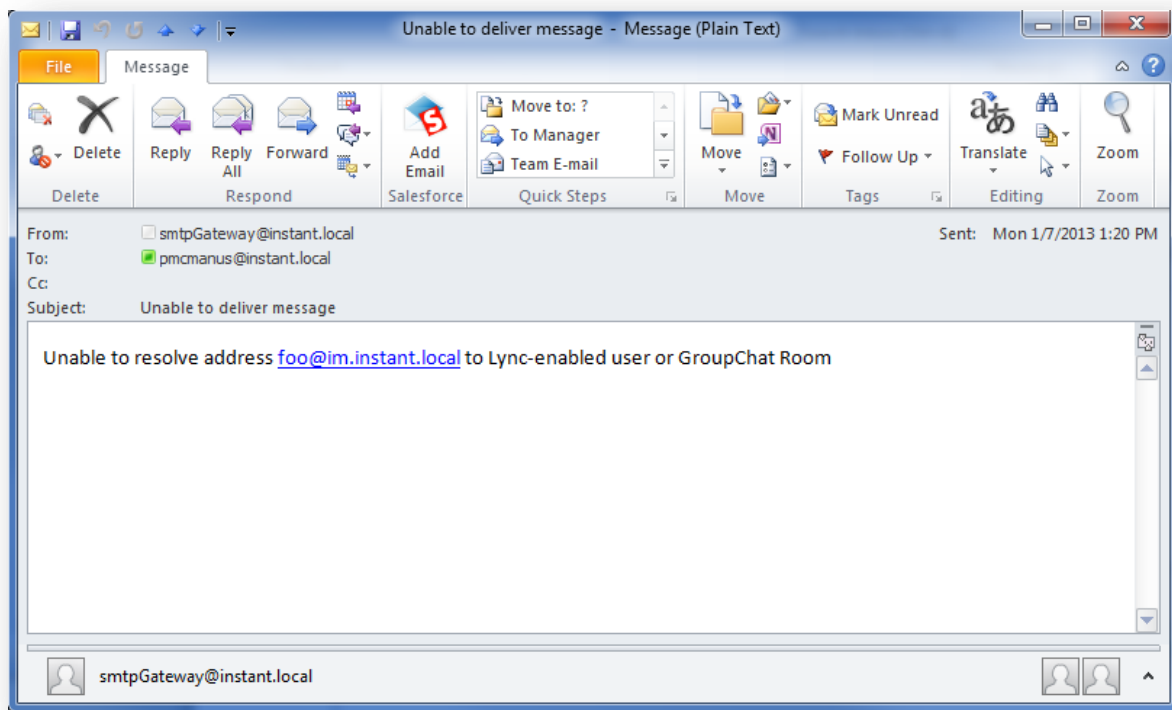


Figure 54: Failed delivery message

## CONFIGURATION COMPLETE

The application should now be successfully installed and configured. To access the application, enter  
< <http://ServerAddress/alertmanager> > into a web browser.



Figure 55: Installation Complete

If you are experiencing any troubles installing, configuring, or accessing the application, contact the Instant Technologies support team:

[Support@instant-tech.com](mailto:Support@instant-tech.com)

Phone: 1 (800) 884-0443

Intl: +1 (603) 397-3344