Maximizing Microsoft Office Communicator

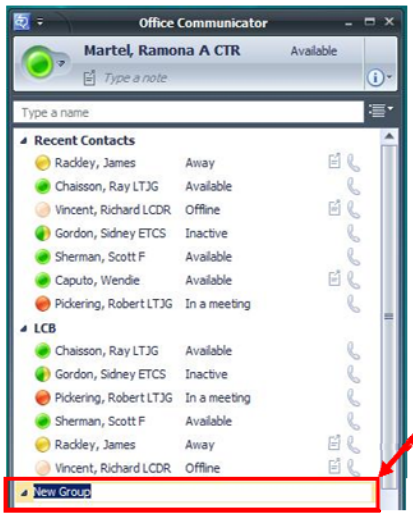
Microsoft Office Communicator is an instant messaging tool on the standard image for CG workstations. This Tech Tip contains basic instructions on how to use the following features of Office Communicator:

Create New Contact Groups
Add/Remove Contacts to/from Groups
View and Sort Settings
Status Alerts
Group Chat
Office Communicator Note
Send an Attachment
Modify Text Format and Add Emoticons
Change the Conversation Subject
Take Notes in OneNote
Share your Computer Screen
Communicator Saving Options
Save a Conversation

Create New Contact Groups

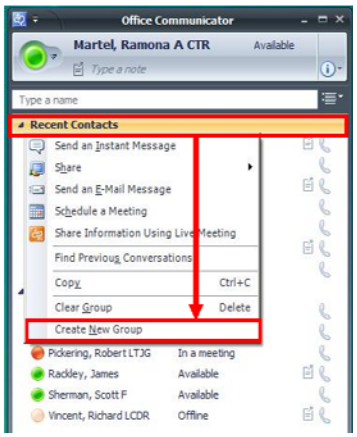
Contact Lists enable you to save your colleagues to a list by any name of your choosing. There are no criteria for how to organize a Contact List in your Office Communicator window, ***however*** you are limited to 64 groups, 100 contacts per group, and 300 contacts overall, by the application. You can group individuals according to whichever way suits your needs. For example, you could group your classmates from Boarding Team Member school into one contact list, and create another contact list for everyone you know at the detailer's office.

Once you've decided what group names and organization you want to use, proceed with the following steps.



1. Open Office Communicator, right-click on "Recent Contacts", then select "Create New Group".
2. A new group title field will appear with the text "New Group". Type the group name and press "Enter".

right-click



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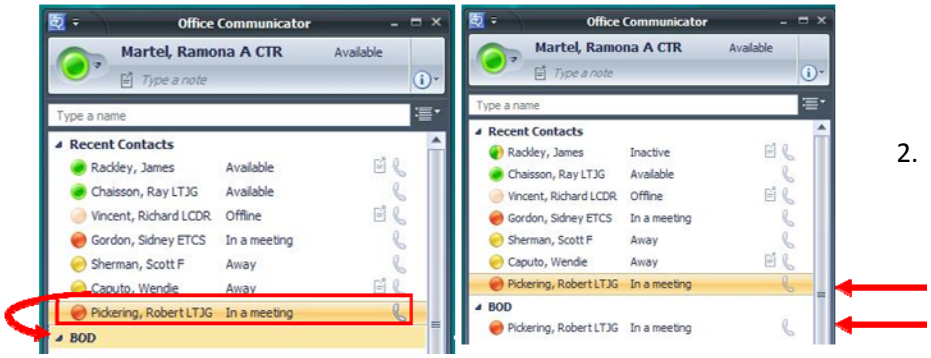
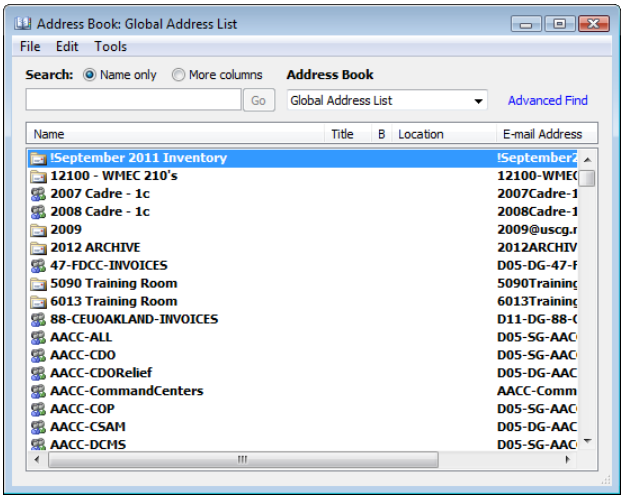
Add/Remove Contacts to/from Groups

There are two ways to add contacts to a group: "Click and drag" or "Right-Click and Add". This section contains some important steps and things to remember when adding contacts.

1. Locate the person you want to add to contacts by either using the search bar at the top, or checking your "Recent Contacts" group, which shows all persons you have messaged within a specific timeline.



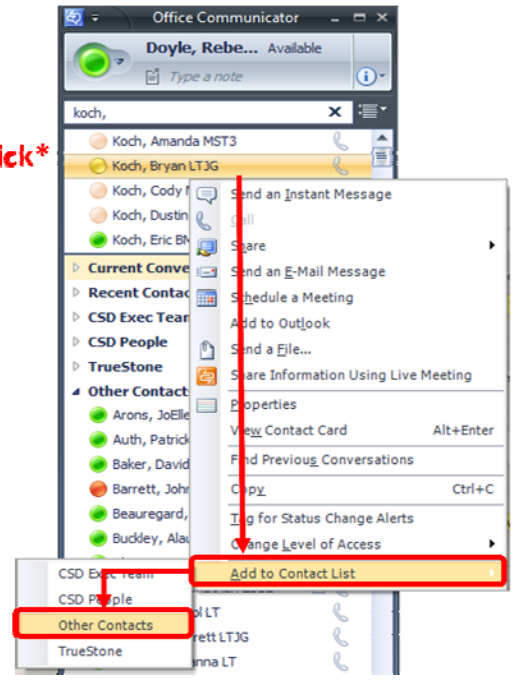
2. Once you've identified the individual you will be adding, left-click and drag their name so that the cursor is over the new group. Release the mouse button. Repeat this step as needed.



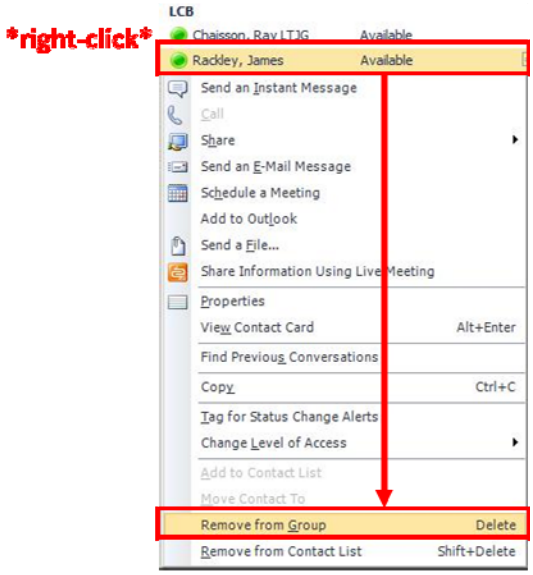
NOTE

This search feature will not only look at the Coast Guard's Global Address List (GAL), but it will also search through your Microsoft Outlook contacts as well. Occasionally, you may notice that a username which appears during the search has a white status marker, and is labeled as "Presence Unknown". Do not add these contacts to your contacts in Office Communicator because they are contacts with non .mil addresses which have no access to the Coast Guard's messaging system.

3. Another way to add a contact instead of how it is done in Step 2, is to right-click on the contact name, highlight "Add to Contact List", and select the correct Group from the drop-down menu.



4. To remove a Contact from a group, right-click the contact name and select “Remove from Group”.



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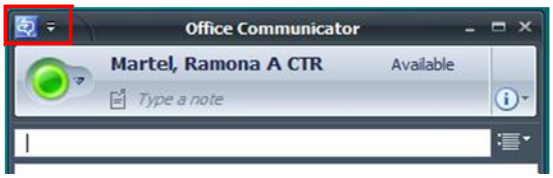
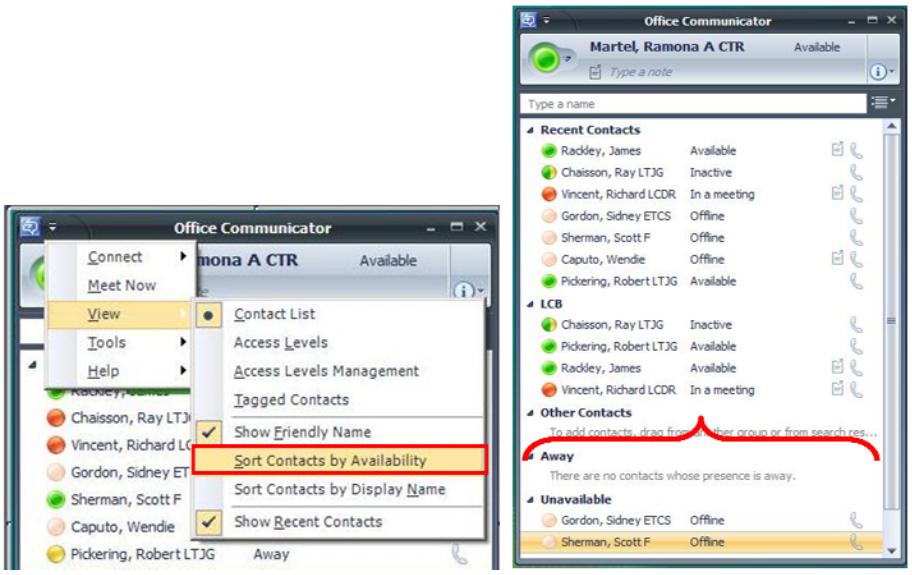
View and Sort Settings

Sometimes the number of contacts in the list can grow until it’s overwhelming. These are some simple tips on how to change the settings in Office Communicator to limit the number of visible contacts.

1. With Office Communicator open, click on the Main Menu drop-down arrow indicated by the screenshot at right.



2. Hover over “View” and select “Sort Contacts by Availability” to move the contacts with a status of “unavailable” or “away” to different Contact Lists at the bottom of your Office Communicator window.



3. To remove the Recent Contacts group from your view, go back to Steps 1 and 2 of this section, and hover over “View” again. Click on “Show Recent Contacts” to un-check and remove that Contact List from your view.

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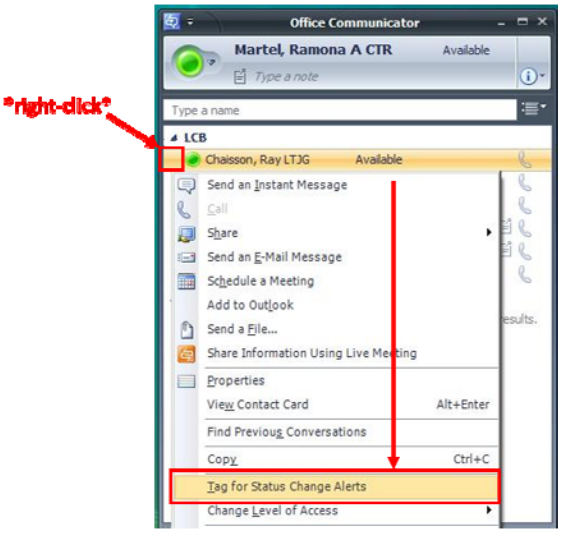
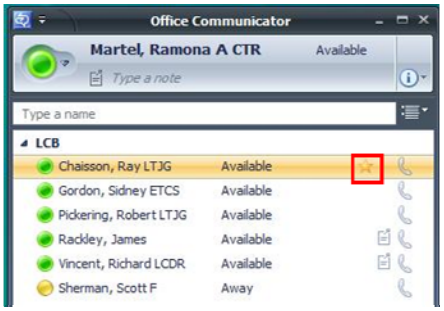
Status Alerts

To be notified when a Contact changes their status, logs on, or logs off, you want to turn on Status Change Alerts for that individual.

1. Right-click the arrow left of the Contact name, and select “Tag for Status Change Alerts”.



2. A gold star will appear to the right of the Contact name.



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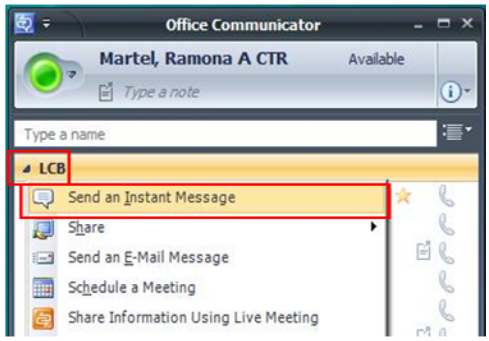
Group Chat

The Group Chat feature allows you to have a message conversation with a group of participants. All of the following features are available in Instant Message and Video Chat.

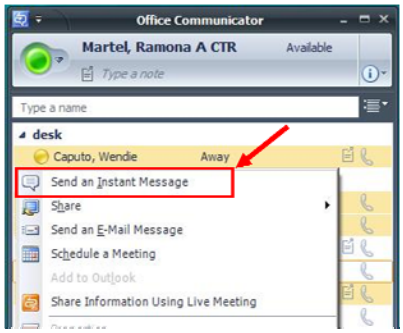
1. To invite ALL members of one group, right-click a Contact Group arrow, and select "Send an Instant Message".



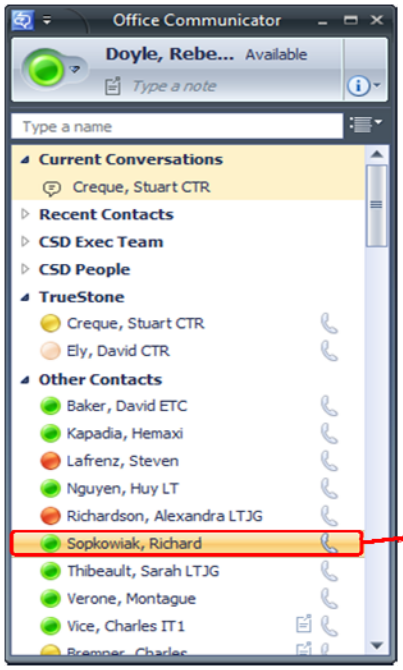
right-click

A Group Chat appears with all Group Member Names listed.

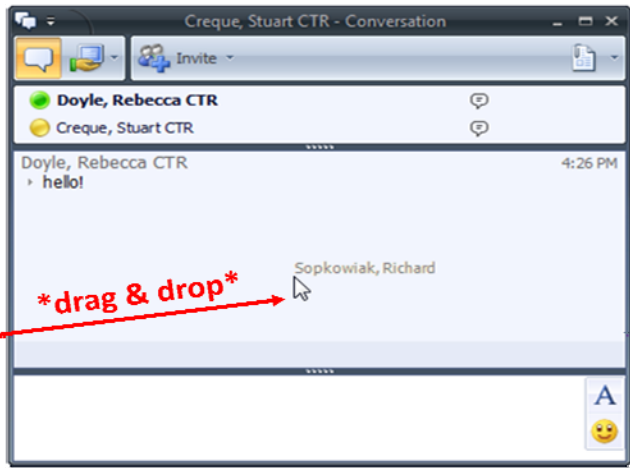
2. To chat with multiple Contacts from different groups, select a Contact, then hold down the "Ctrl" key on your keyboard while selecting the other Contact names.



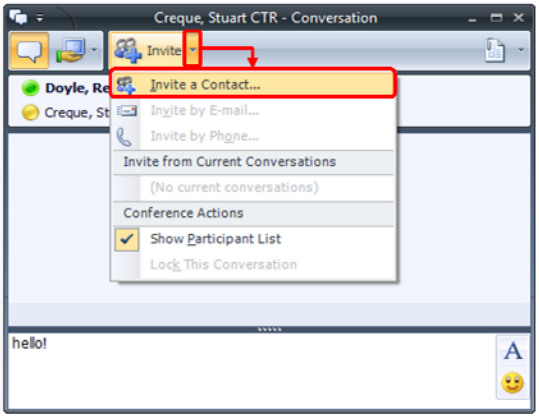
Then right-click on one of the Contacts and select "Send an Instant Message".

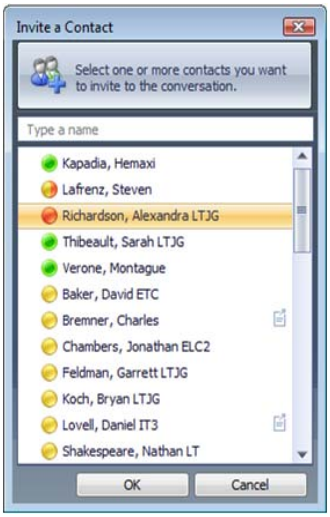


3. To create a chat from an already open conversation, add additional contacts by left-clicking and dragging the additional Contact(s) into the open dialog box. The new Contact will be invited to join.



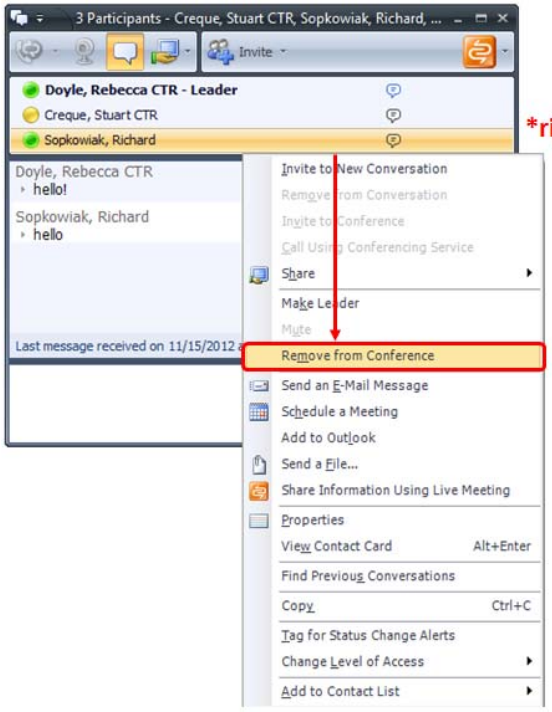
4. The last way to add a Contact to a Group Chat may be done from the Chat window itself. Click the drop-down arrow next to “Invite” and select “Invite a Contact”.





A window labeled “Invite a Contact” will appear. Search for and select a Contact name, and then click “OK”. The new Contact is the invited to the Group Chat.

5. Now, to ***remove*** a Contact from a Group Chat, right-click on the participant’s name, and select “Remove from Conversation”. The Contact is then removed from the Group Chat.



right-click

NOTE

These are just basic Tips and Tricks on starting a conversation in Office Communicator. For a more detailed explanation of how to use Office Communicator or LiveMeeting to conduct a meeting, look for a new CGFIXIT Tech Tip on Online Meetings.

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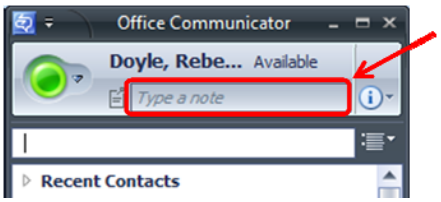
Office Communicator Note

There is a feature of Office Communicator which allows you to publicly post a statement visible to other people using the application. There are no CG policies governing what information may be placed here, but it is recommended that you keep the language respectful and professional.



1. To create a note, simply type a message into the box directly below your name on the Office Communicator console, and press “Enter” on your keyboard.

2. To view someone’s note, hover your mouse over the icon near their contact name that looks like a notepad.

3. To remove your note, highlight and delete the text and press “Enter” on your keyboard.

4. If you have out of office messages turned on, they will be visible in this space. You will need to turn off your Out of Office replies before your note field can be cleared.

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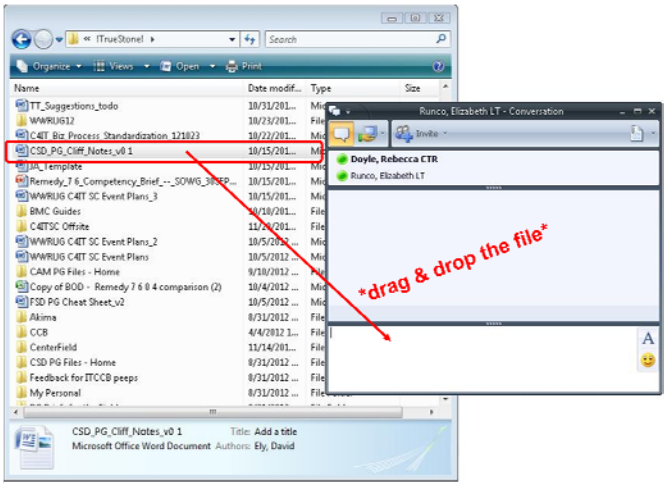
Send an Attachment

There are numerous way to share files with other users over the CGOne network. One simple method is done in an Office Communicator conversation. These steps require the recipient to accept the document transfer before the file can be successfully downloaded to their computer.

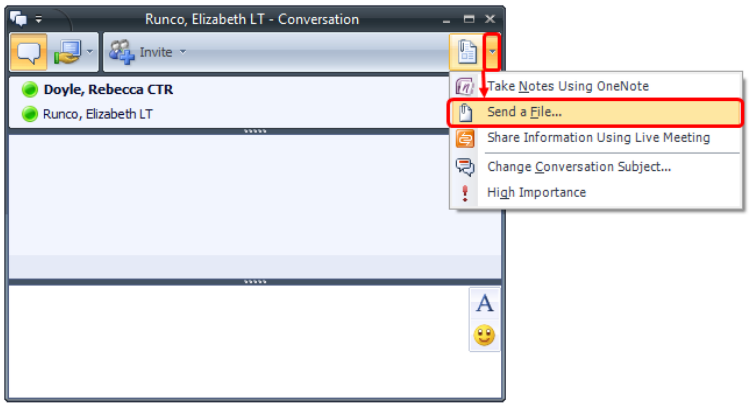
Some files cannot be transferred due to size or type. For example, .exe files cannot be sent over CGOne via e-mail or Office Communicator.



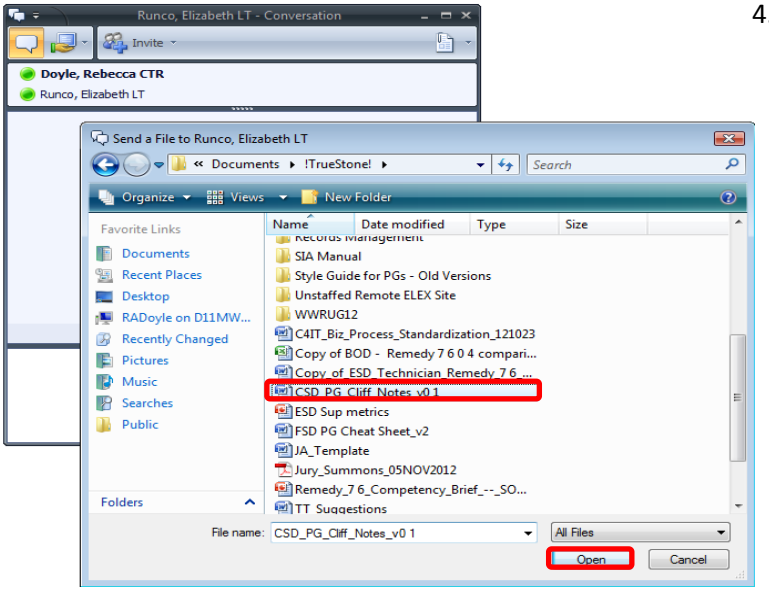
1. Perhaps the easier way to send a file to a contact over office communicator, is to use the “drag and drop” method. Left-click to select the file in question from its folder and drag it into the conversation window.

   If you are using this method, skip to Step 4 now.

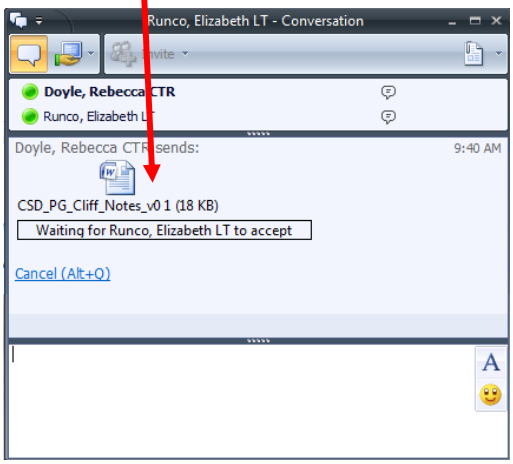
2. In the top-right-hand corner of your conversation window, there is an icon which resembles a notepad, and an arrow for a drop-down menu. Click on the arrow and select “Send a File…”.



3. A browser window will open. Navigate to the file, highlight it, and click “Open”.

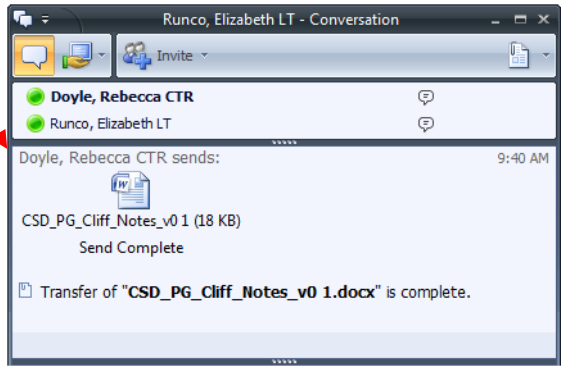


4. The recipient will be notified that they are being sent a file, but that they must accept the file by following the on-screen instructions. Your screen will look like this until the transfer completes.



5. If successful, your conversation window will show

6. If not successful, verify that the recipient acknowledged the document transfer before trying another method to share the file. Reference the Maximizing your Microsoft Outlook Tech Tip on how to attach the file to an e-mail.



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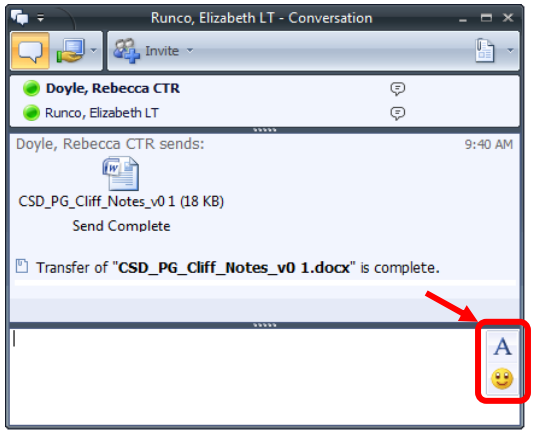
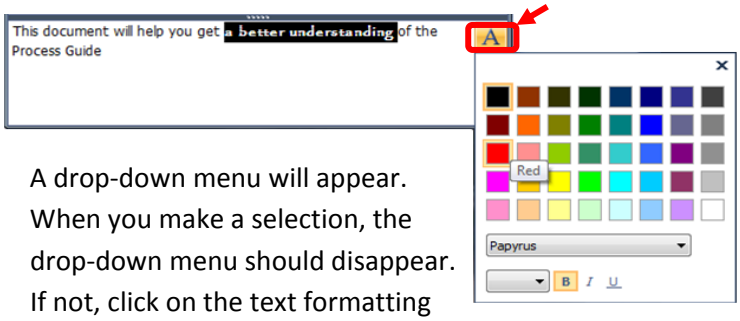
Modify Text Format and Add Emoticons

For your convenience, the text formatting A and emoticon buttons are easily accessible within the conversation window.

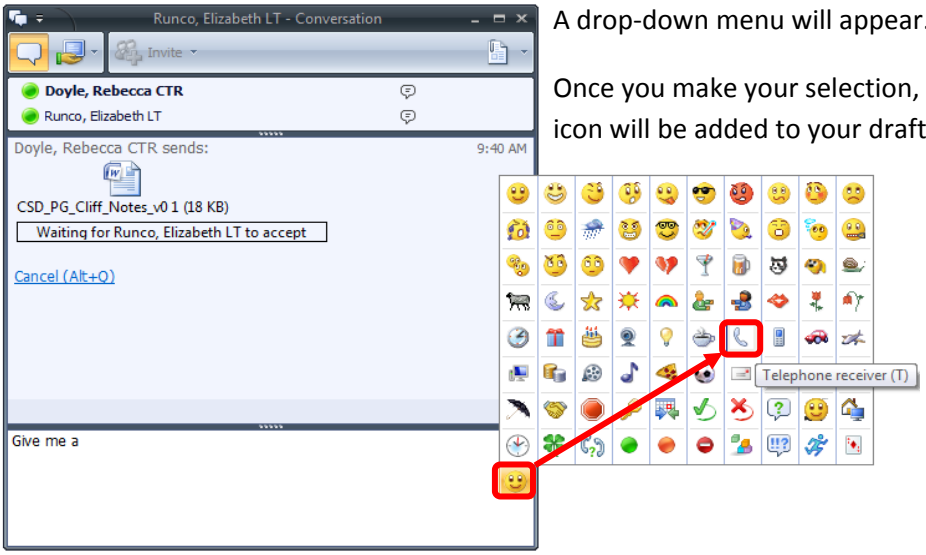


1. To change the font style, color, or size, highlight the text you wish to modify and click on the text formatting button.



A drop-down menu will appear. When you make a selection, the drop-down menu should disappear. If not, click on the text formatting button again.

2. To add the image of a face, or some other graphic that fits the context of your discussion, click on the emoticon button.



A drop-down menu will appear.

Once you make your selection, the menu will disappear and the icon will be added to your drafted dialog box.

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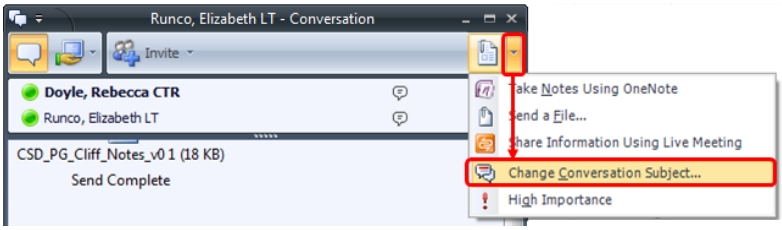
Change the Conversation Subject

Every conversation in Office Communicator has a Subject. If the conversation originates as a response to an e-mail, the subject will be the title of the e-mail. If it originates any other way, the subject will be generic, such as "Conversation".

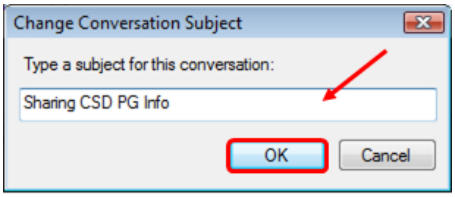
If you intend to save the conversation or takes notes using Microsoft OneNote, it may be beneficial to first re-name the conversation so that you may locate it more easily later.

1. In the upper-right-hand corner of the conversation window, select the drop-down menu arrow next to the notepad.

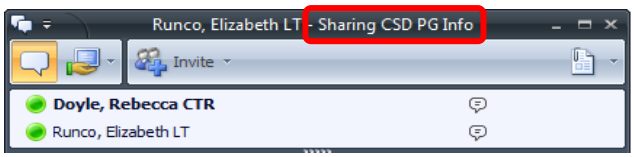


2. A menu will appear. Select "Change Conversation Subject…"

3. A new window will pop-up. Enter the new name of the conversation and click "OK" to apply the change.



4. The new subject will appear immediately.



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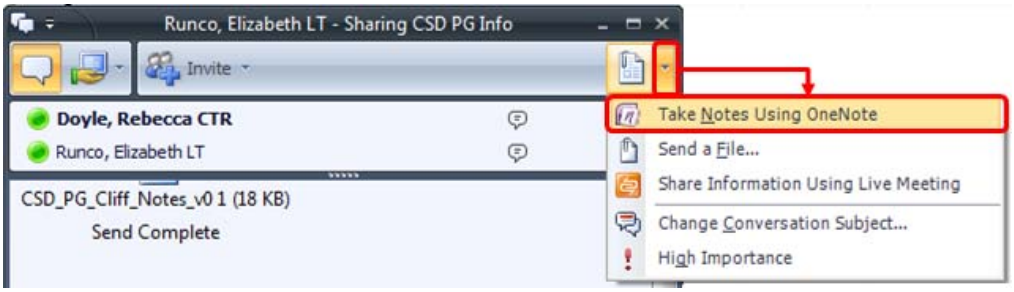
Take Notes in OneNote

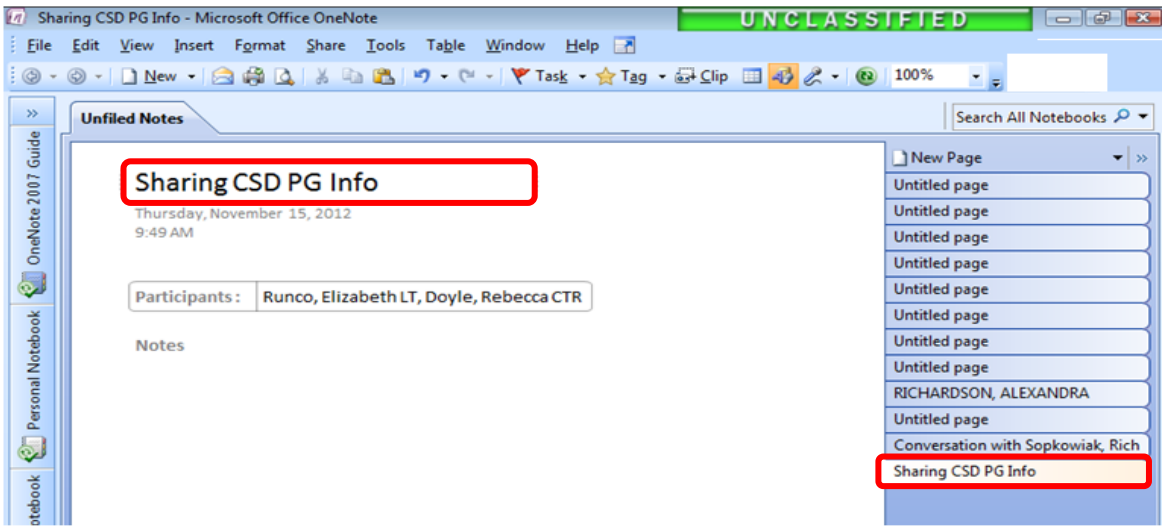
Microsoft OneNote is a very useful tool, primarily because it frequently automatically saves. It can be very useful for organizing anecdotal information and to-do lists.

1. In the upper-right-hand corner of the conversation window, select the drop-down menu arrow next to the icon which looks like a notepad.

2. Select “Take Notes Using OneNote”



3. The application will automatically load and create a new page in OneNote. This simple action copies the conversation subject, names of participating persons, and the date and time the note page was created. Click anywhere in the empty whitespace to add notes, copy and paste text or images, etc.



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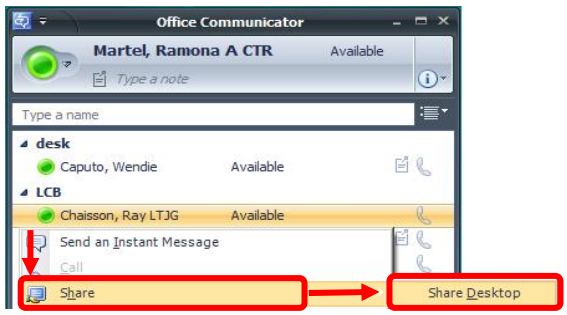
Share your Computer Screen

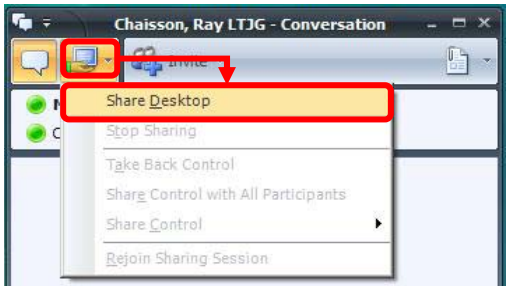
While in a conversation, it's possible to share your entire desktop or only one of your multiple monitors. A green border will appear around the edge of whichever screen(s) you choose to share.

As with other functions described in this Tech Tip, there are multiple ways to share your desktop.

1. To share your desktop with a contact ***whom you are not already in conversation with***, right-click on a contact name, highlight "Share" and select "Share Desktop". The contact will receive an invitation to view your desktop.



2. To share your desktop from an open conversation, click drop-down arrow next to the Share icon , and select "Share Desktop".



NOTE

If you have two monitors, both options #1 and #2 will give you the option to "Share Desktop", "Share Main Monitor", or "Share Second Monitor". A bright green border will appear around the perimeter of the shared area.

3. To turn off sharing, click the Share icon again, and select "Stop Sharing"

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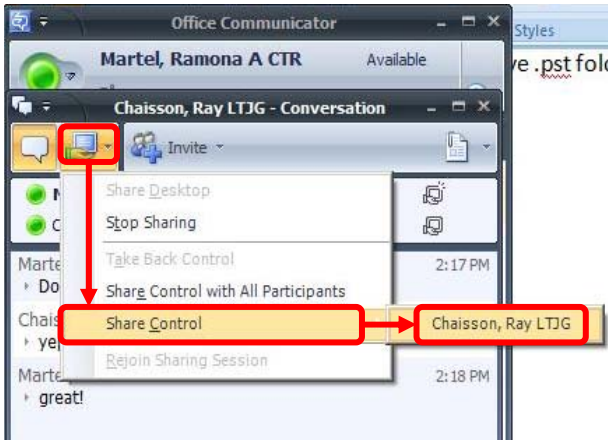
Share your Desktop

When sharing your desktop, you can give another person in the conversation the ability to control your computer. This feature can be especially helpful if the individual is trying to show you something, or if you are using Office Communicator to run a meeting and the participant wants to advance the powerpoint slides on his/her own.

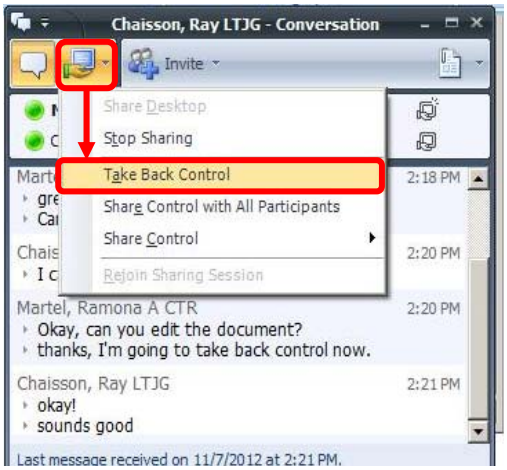
1. Click drop-down arrow next to the Share icon, and hover over "Share Control".

   Select the name of the person in the conversation whom you wish to allow the ability to control your computer.



2. Verify the Contact can move your mouse, make selections on your screen, and/or is able to enter information with his/her keyboard.

3. When you are ready to rescind their ability to control your computer, click the Share drop-down again, and select "Take Back Control".



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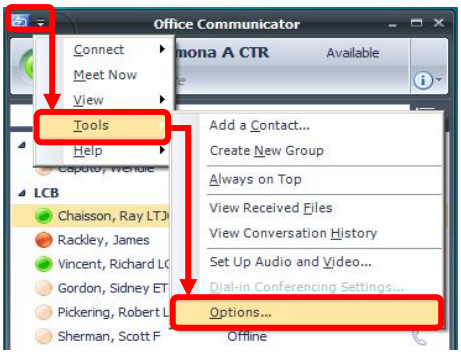
Communicator Saving Options

Instant messages and call logs can be saved and Archived in Outlook.

1. Click the Main Menu drop-down arrow in the upper-left corner, highlight "Tools", and select "Options".

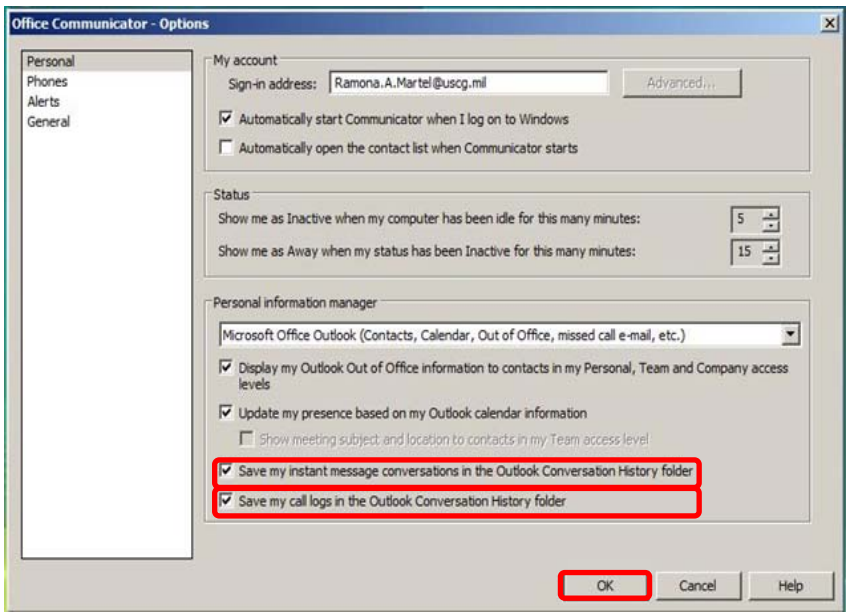


2. The window labeled "Office Communicator – Options" will appear. Ensure the following boxes are checked:

   - "Save my instant message conversations in the Outlook Conversation History folder"
   - "Save my call logs in the Outlook Conversation History folder"

   Click "OK" to save.

   Instant messages and call logs will now be saved in Microsoft Outlook's Conversation History folders. See the Section of this Tech Tip on how to Save a Conversation.



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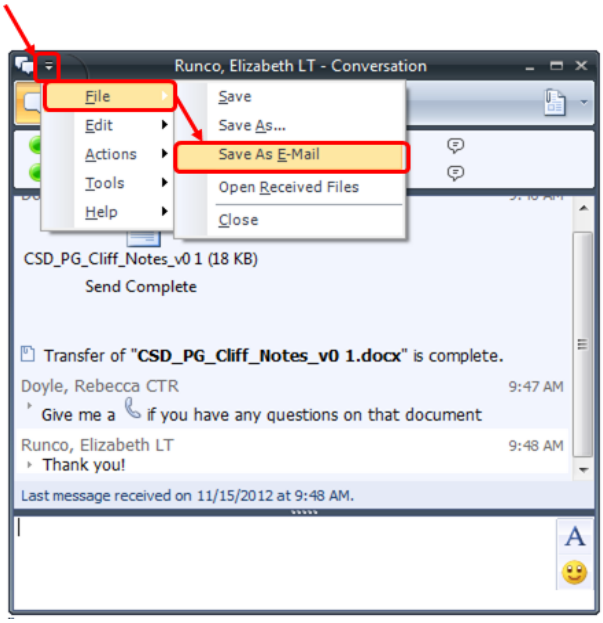
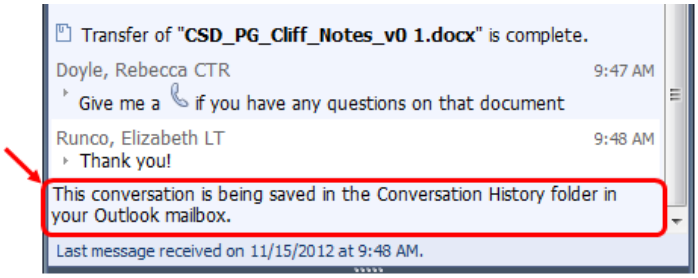
Save a Conversation

Sometimes OC conversations contain useful or important information that needs to be saved and referenced at a later date. If this is the case, it may be easiest to save the conversation as an e-mail. Saved conversations can even be forwarded like a regular e-mail message.



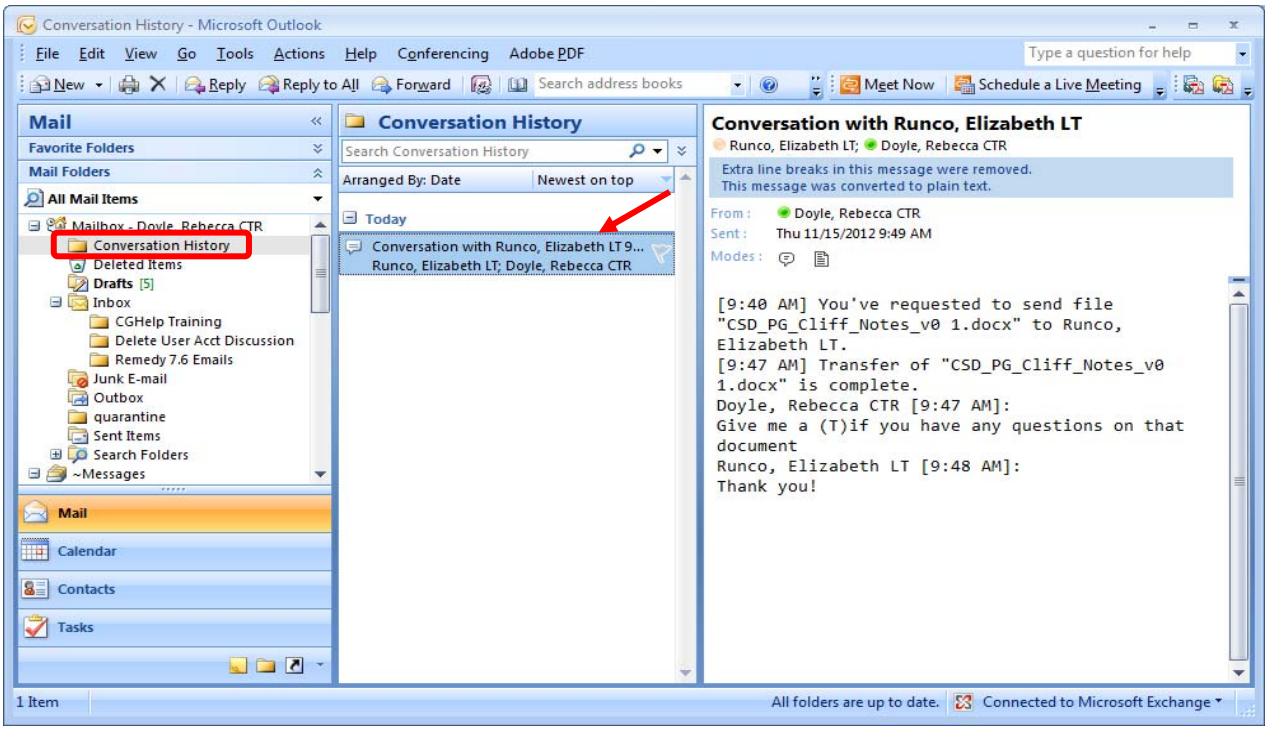
1. In the top-left-hand corner of the conversation window is a small icon for a drop-down menu. Select that, then hover the mouse over "File" and then select "Save As E-Mail"

2. A message will appear in the conversation window (only on your screen) that the conversation was saved.



3. To view the saved conversation, open Microsoft Outlook and left click on the folder labeled "Conversation History" to view its contents.

   The recently saved conversation is displayed like an e-mail.

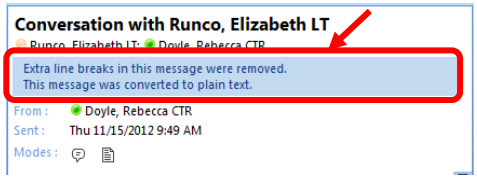


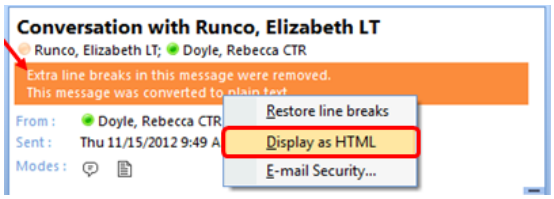
4. If you wish to view the conversation in HTML, you will be able to see the text formatting. To do this, left-click on the light blue bar displayed beneath the conversation name.

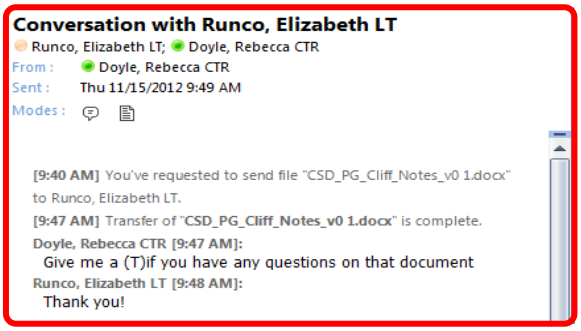
   The bar will turn orange and a drop down menu will appear.

   Select the option to “Display as HTML”.

   The screen will update, but if you look at a different message in Microsoft Outlook, you will have to re-do these steps each time you want to view the conversation in HTML.







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If you follow these steps and still experience problems please submit a CGFIXIT ticket to request assistance.