



Manage Chat

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Manage Chat Overview

IM and Presence Service provides you with settings you can use to manage your chat rooms and to control who has access to them. This includes the ability to:

- Create new rooms, manage members and the configurations of the rooms they create.
- Control access to persistent chat rooms so that only members of that room have access.
- Assign Administrators to a chat room.
- Invite other users to a room.
- Determine the presence status of the members displayed within the room. The presence status displayed in a room confirms the attendance of the member in a room but may not reflect their overall presence status.

IM and Presence Service also lets you manage chat node aliases. Chat node aliases make it possible for your users to search for specific chat rooms on specific nodes, and to join those chat rooms.

In addition, the IM and Presence Service also stores transcripts and makes this chat room history available to room members, including members who have just joined the chat room. You can configure how much of the existing archive you want to make available to new and old members. .

Chat Node Alias Overview

Each chat node in a system must have a unique alias. Chat node aliases are unique addresses for each chat node so that users (in any domain) can search for specific chat rooms on specific nodes, and join chat in those rooms. Chat node aliases form a part of the unique ID for each chat room that is created on that node. For example, the alias `conference-3-mycup.cisco.com` gets used to name the chat room `roomjid@conference-3-mycup.cisco.com` that is created on that node.

There are two modes for assigning chat node aliases:

- **System-generated**—The system automatically assigns a unique alias to each chat node. By default, the system auto-generates one alias per chat node by using the following naming convention: `conference-x-clusterid.domain`, where:

- `conference` is a hardcoded keyword
- `x` is the unique integer value that denotes the node ID
- `clusterid` is the configured enterprise parameter
- `domain` is the configured domain

For example, the system might assign: `conference-3-mycup.cisco.com`

- **Manual**—You must disable system-generated aliases to be able to assign chat node aliases manually. With manually-assigned aliases, you have complete flexibility to name chat nodes using aliases that suit your specific requirements. For example, you might do this if the `conference-x-clusterid.domain` naming convention does not suit your deployment needs.

Assigning Multiple Aliases per Node

You can associate more than one alias with each chat node on a per-node basis. Multiple aliases per node allows users to create additional chat rooms using these aliases. This functionality applies to both system-generated aliases and aliases that are created manually.

Manage Chat Prerequisites

Ensure that you have persistent chat enabled.

Manage Chat Task Flow

Procedure

	Command or Action	Purpose
Step 1	Enable Chat Room Owners to Edit Chat Room Settings, on page 3	Configure whether you want to allow chat room owners to be able to edit chat room settings. Otherwise, only administrators will be able to edit chat room settings.
Step 2	Allow Clients to Log Instant Message History, on page 4	Configure whether you want to allow users to log instant message history locally on their computer.
Step 3	View External Database Text Conferencing Report, on page 4	Use this procedure to view the External Database Text Conferencing Report that lets you view details on the persistent chat rooms.

	Command or Action	Purpose
Step 4	<p>Edit chat room settings. Complete any of the following tasks, in any order, to update chat room settings:</p> <ul style="list-style-type: none"> • Set Number of Chat Rooms, on page 5 • Configure Chat Room Member Settings, on page 5 • Configure Availability Settings, on page 6 • Configure Occupancy Settings, on page 7 • Configure Chat Message Settings, on page 8 • Configure Moderated Room Settings, on page 9 • Configure History Settings, on page 9 	<p>Note If you update any of the Persistent Chat settings, on Cisco Unified IM and Presence Serviceability, choose Tools > Control Center - Feature Services to restart the Cisco XCP Text Conference Manager service.</p>
Step 5	Reset Chat Rooms to System Defaults, on page 9	Complete this optional task if you want to reset your chat configuration to the system defaults. Be aware that ad hoc chat is enabled by default, but persistent chat is disabled by default. Completing this task would disable persistent chat.
Step 6	Manage Chat Node Aliases, on page 10	Aliases create a unique address for each chat node so that users (in any domain) can search for specific chat rooms on specific nodes, and join chat in those rooms. Each chat node in a system must have a unique alias.
Step 7	Clean External Database for Persistent Chat, on page 12	Optional. Use the External Database Cleanup Utility to configure jobs that monitor the external database and delete expired records. This will ensure that there is always enough disk space for new records.

Enable Chat Room Owners to Edit Chat Room Settings

Use this procedure if you want to allow chat room owners to be able to edit chat room settings.



Note The availability of configuring these settings from the client also depends on the client implementation and whether the client is providing an interface in which to configure these settings.

Procedure

- Step 1** In **Cisco Unified CM IM and Presence Administration**, choose **Messaging > Group Chat and Persistent Chat**.
- Step 2** Configure a value for the **Room owners can change whether or not rooms are for members only** check box.
- Checked—Chat room owners have administrative ability to edit chat room settings.
 - Unchecked—Only an administrator can edit chat room settings.
- Step 3** Click **Save**.
- Step 4** In **Cisco Unified IM and Presence Serviceability**, choose **Tools > Control Center - Feature Services**.
- Step 5** Restart the Cisco XCP Text Conference Manager service.
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Allow Clients to Log Instant Message History

You can prevent or allow users to log instant message history locally on their computer. On the client side, the application must support this functionality; it must enforce the prevention of instant message logging

Procedure

- Step 1** In **Cisco Unified CM IM and Presence Administration**, choose **Messaging > Settings**.
- Step 2** Configure the log instant message history setting as follows:
- To allow users of client applications to log instant message history on IM and Presence Service, check **Allow clients to log instant message history (on supported clients only)**.
 - To prevent users of client applications from logging instant message history on IM and Presence Service, uncheck **Allow clients to log instant message history (on supported clients only)**.
- Step 3** Click **Save**.
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View External Database Text Conferencing Report

Use this procedure to view the External Database Text Conferencing Report. This report lets you view details of the persistent and ad-hoc chat rooms in your deployment.

Procedure

- Step 1** Log into **Cisco Unified CM IM and Presence Administration**.
- Step 2** Choose **Messaging > Group Chat and Persistent Chat**.
- Step 3** Under **Persistent Chat Database Assignment**, click the **Room Report** button.
- Step 4** Use the filter tools if you want to limit the selection to rooms that meet specific criteria.
- Step 5** Click **Find**.

Step 6 Select a specific chat room to view details for that room.

Note The number of records fetched from the database depends on the value selected from "Records Fetched" drop-down list.

Configure Chat Room Settings

Set Number of Chat Rooms

Use room settings to limit the number of rooms that users can create. Limiting the number of chat rooms helps the performance of the system and allows it to scale. Limiting the number of rooms also helps to mitigate any possible service-level attacks.

Procedure

Step 1 In **Cisco Unified CM IM and Presence Administration**, choose **Messaging > Group Chat and Persistent Chat**.

Step 2 To change the maximum number of chat rooms that are allowed, enter a value in the field for **Maximum number of rooms allowed**. The default is set to 5500.

Step 3 Click **Save**.

Configure Chat Room Member Settings

Member settings allow control over the membership in chat rooms. Such a control is useful for users to mitigate service-level attacks that can be prevented by restricting membership. Configure the member settings as required.

Procedure

Step 1 In **Cisco Unified CM IM and Presence Administration**, choose **Messaging > Group Chat and Persistent Chat**.

Step 2 Configure the room member settings as described in Room Member Settings.

Step 3 Click **Save**.

Step 4 In **Cisco Unified IM and Presence Serviceability**, choose **Tools > Control Center - Feature Services**.

Step 5 Restart the Cisco XCP Text Conference Manager service.

Room Member Settings



Note Persistent chat rooms inherit their settings when you create the room. Later changes do not apply to existing rooms. Those changes only apply to rooms created after the changes take effect.

Table 1:

Field	Description
Rooms are for members only by default	<p>Check this check box if you want rooms to be created as members-only rooms by default. Members-only rooms are accessible only by users on an allowed list configured by the room owner or administrator. The check box is unchecked by default.</p> <p>Note The allowed list contains the list of members who are allowed in the room. It is created by the owner or administrator of the members-only room.</p>
Only moderators can invite people to members-only rooms	<p>Check this check box if you want to configure the room so that only moderators are allowed to invite users to the room. If this check box is unchecked, members can invite other users to join the room. The check box is checked by default.</p>
Room owners can change whether or not rooms are for members only	<p>Check this check box if you want to configure the room so that room owners are allowed to change whether or not rooms are for members only. The check box is checked by default.</p> <p>Note A room owner is the user who creates the room or a user who has been designated by the room creator or owner as someone with owner status (if allowed). A room owner is allowed to change the room configuration and destroy the room, in addition to all other administrator abilities.</p>
Room owners can change whether or not only moderators can invite people to members-only rooms	<p>Check this check box if you want to configure the room so that room owners can allow members to invite other users to the room. The check box is checked by default.</p>
Users can add themselves to rooms as members	<p>Check this check box if you want to configure the room so that any user can request to join the room at any time. If this check box is checked, the room has an open membership. The check box is unchecked by default.</p>
Room owners can change whether users can add themselves to rooms as members	<p>Check this check box if you want to configure the room so that room owners have the ability to change the setting that is listed in Step 5 at any time. The check box is unchecked by default.</p>

Configure Availability Settings

Availability settings determine the visibility of a user within a room.

Procedure

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- Step 1** In Cisco Unified CM IM and Presence Administration, choose **Messaging > Group Chat and Persistent Chat**.

- Step 2** Configure the availability member settings as described in Availability Settings.
- Step 3** Click **Save**.
- Step 4** In **Cisco Unified IM and Presence Serviceability**, choose **Tools > Control Center - Feature Services**.
- Step 5** Restart the Cisco XCP Text Conference Manager service.

Availability Settings

Field	Description
Members and administrators who are not in a room are still visible in the room	<p>Check this check box if you want to keep users on the room roster even if they are currently offline. The check box is checked by default.</p> <p>Note If the administrator leaves the chat room, the administrator's userid will still be visible in the chat room. The user needs to close and reopen the chat room to refresh the user's list.</p>
Room owners can change whether members and administrators who are not in a room are still visible in the room	Check this check box if you want to allow room owners the ability to change the visibility of a member or administrator. The check box is checked by default.
Rooms are backwards-compatible with older clients	Check this check box if you want the service to function well with older Group Chat 1.0 clients. The check box is unchecked by default.
Room owners can change whether rooms are backwards-compatible with older clients	Check this check box if you want to allow room owners the ability to control backward compatibility of the chat rooms. The check box is unchecked by default.
Rooms are anonymous by default	Check this check box if you want the room to display the user nickname but keep the Jabber ID private. The check box is unchecked by default.
Room owners can change whether or not rooms are anonymous	Check this check box if you want to allow room owners to control the anonymity level of the user Jabber ID. The check box is unchecked by default.

Configure Occupancy Settings

Occupancy settings determine how many users can be in a chat room at a given time.

Procedure

- Step 1** To change the system maximum number of users that are allowed in a room, enter a value in the field for **How many users can be in a room at one time**. The default value is set to 1000.

Note The total number of users in a room should not exceed the value that you set. The total number of users in a room includes both normal users and hidden users.

- Step 2** To change the number of hidden users that are allowed in a room, enter a value in the field for **How many hidden users can be in a room at one time**. Hidden users are not visible to others, cannot send a message to the room, and do not send presence updates. Hidden users can see all messages in the room and receive presence updates from others. The default value is 1000.
- Step 3** To change the default maximum number of users that are allowed in a room, enter a value in the field for **Default maximum occupancy for a room**. The default value is set to 50 and cannot be any higher than the value that is set in Step 1.
- Step 4** Check **Room owners can change default maximum occupancy for a room** if you want to allow room owners to change the default maximum room occupancy. The check box is checked by default.
- Step 5** Click **Save**.
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Configure Chat Message Settings

Use Chat Message settings to give privileges to users based on their role. For the most part, roles exist in a visitor-to-moderator hierarchy. For example, a participant can do anything a visitor can do, and a moderator can do anything a participant can do.

The check box is checked by default.

Procedure

- Step 1** From the drop-down list for **Lowest participation level a user can have to send a private message from within the room**, choose one:
- **Visitor** allows visitors, participants, and moderators to send a private message to other users in the room. This is the default setting.
 - **Participant** allows participants and moderators to send a private message to other users in the room.
 - **Moderator** allows only moderators to send a private message to other users in the room.
- Step 2** Check **Room owners can change the lowest participation level a user can have to send a private message from within the room** if you want to allow room owners to change the minimum participation level for private messages. The check box is checked by default.
- Step 3** From the drop-down list for **Lowest participation level a user can have to change a room's subject**, choose one:
- a) **Participant** allows participants and moderators to change the room's subject. This is the default setting.
 - b) **Moderator** allows only moderators to change the room's subject.
- Visitors are not permitted to change the room subject.
- Step 4** Check **Room owners can change the lowest participation level a user can have to change a room's subject** if you want to allow room owners to change the minimum participation level for updating a room's subject.
- Step 5** Check **Remove all XHTML formatting from messages** if you want to remove all Extensible Hypertext Markup Language (XHTML) from messages. The check box is unchecked by default.
- Step 6** Check **Room owners can change XHTML formatting setting** if you want to allow room owners to change the XHTML formatting setting. The check box is unchecked by default.

Step 7 Click **Save**.

Configure Moderated Room Settings

Moderated rooms provide the ability for moderators to grant and revoke the voice privilege within a room (in the context of Group Chat, voice refers to the ability to send chat messages to the room). Visitors cannot send instant messages in moderated rooms.

Procedure

- Step 1** Check **Rooms are moderated by default** if you want to enforce the role of moderator in a room. The check box is unchecked by default.
- Step 2** Check **Room owners can change whether rooms are moderated by default** if you want to allow room owners the ability to change whether rooms are moderated. The check box is checked by default.
- Step 3** Click **Save**.
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Configure History Settings

Use History settings to set the default and maximum values of messages that are retrieved and displayed in the rooms, and to control the number of messages that can be retrieved through a history query. When a user joins a room, the user is sent the message history of the room. History settings determine the number of previous messages that the user receives.

Procedure

- Step 1** To change the maximum number of messages that users can retrieve from the archive, enter a value in the field for **Maximum number of messages that can be retrieved from the archive**. The default value is set to 100. It serves as a limit for the next setting.
- Step 2** To change the number of previous messages displayed when a user joins a chat room, enter a value in the field for **Number of messages in chat history displayed by default**. The default value is set to 15 and cannot be any higher than the value that is set in Step 1.
- Step 3** Check **Room owners can change the number of messages displayed in chat history** if you want to allow room owners to change the number of previous messages displayed when a user joins a chat room. The check box is unchecked by default.
- Step 4** Click **Save**.
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Reset Chat Rooms to System Defaults

Use this procedure if you want to reset your group chat settings for both ad hoc and persistent chat rooms to the system defaults..



Note Ad hoc chat is enabled by default, but persistent chat is disabled by default. Completing this task will disable persistent chat

Procedure

- Step 1** In **Cisco Unified CM IM and Presence Administration**, choose **Messaging > Settings**.
- Step 2** Click **Set to Default**.
- Step 3** Click **Save**.

Chat Node Alias Management

Manage Chat Node Aliases

Complete these tasks to manage chat node aliases for your cluster. You can have the system manage aliases automatically, or you can update them yourself.

Procedure

	Command or Action	Purpose
Step 1	Assign Mode for Managing Chat Aliases , on page 10	Assign whether you want the system to manage chat node aliases or whether you want to do it manually.
Step 2	Add Chat Node Alias Manually, on page 11	Add, edit, or delete chat node aliases for your cluster.

Assign Mode for Managing Chat Aliases

Configure whether you want the system to assign chat node aliases automatically using the `conference-x-clusterid.domain` naming convention, or whether you want to assign them manually.

Before you begin

For information on chat node aliases, see [Chat Node Alias Overview, on page 1](#).

Procedure

- Step 1** In **Cisco Unified CM IM and Presence Administration**, choose **Messaging > Group Chat and Persistent Chat**.
- Step 2** Enable or disable system-generated aliases:
 - If you want the system to assign chat node aliases automatically, check **System Automatically Manages Primary Group Chat Server Aliases**.

Tip Choose **Messaging > Group Chat Server Alias Mapping** to verify that the system-generated alias is listed under Primary Group Chat Server Aliases.

- If you want to assign chat node aliases manually, uncheck **System Automatically Manages Primary Group Chat Server Aliases**.

What to do next

- Even if you configure a system-generated alias for a chat node, you can associate more than one alias with the node if required.
- If you are federating with external domains, you may want to inform federated parties that the aliases have changed and new aliases are available. To advertise all aliases externally, configure DNS and publish the aliases as DNS records.
- If you update any of the system-generated alias configuration, perform one of these actions: Restart the Cisco XCP Text Conference Manager.
- To add, edit, or delete a chat node alias, [Add Chat Node Alias Manually, on page 11](#).

Add Chat Node Alias Manually

Use this procedure to manually add, edit, or delete chat node aliases. To manually manage chat node aliases, you must turn off the default setting, which uses system-generated aliases. If you turn off a system-generated alias, the existing alias (`conference-x-clusterid.domain`) reverts to a standard, editable alias listed under Conference Server Aliases. This maintains the old alias and the chat room addresses that are associated with that alias.

You can manually assign multiple aliases to chat nodes. Even if a system-generated alias already exists for a chat node, you can associate additional aliases to the node manually.

For manually-managed aliases, it is the responsibility of the administrator to manually update the alias list if the Cluster ID or domain changes. System-generated aliases will incorporate the changed values automatically.



Note Although it is not mandatory, we recommend that you always include the domain when you assign a new chat node alias to a node. Use this convention for additional aliases, `newalias.domain`. Choose **Cisco Unified CM IM and Presence Administration > Presence Settings > Advanced Settings** to see the domain.

Before you begin

[Assign Mode for Managing Chat Aliases , on page 10](#)

Procedure

- Step 1** In **Cisco Unified CM IM and Presence Administration**, choose **Messaging > Group Chat Server Alias Mapping**.
- Step 2** Click **Find**.

The Group Chat Server Alias window displays the existing node aliases.

- Step 3** To add a new alias:
- Click **Add New**.
 - In the **Group Chat Server Alias** field, enter a new alias.
 - From the **Server Name** drop-down list box, select the server to which you want to assign the alias.
 - Click **Save**.
- Step 4** To edit an existing alias:
- Select the alias.
 - Enter your updates and click **Save**.
- Step 5** To delete an alias, select the alias and click **Delete Selected**.

What to do next

- Turn on the Cisco XCP Text Conference Manager.

Chat Node Alias Troubleshooting Tips

- Every chat node alias must be unique. The system will prevent you from creating duplicate chat node aliases across the cluster.
- A chat node alias name cannot match the IM and Presence domain name.
- Delete old aliases only if you no longer need to maintain the address of chat rooms via the old alias.
- If you are federating with external domains, you may want to inform federated parties that the aliases have changed and new aliases are available. To advertise all aliases externally, configure DNS and publish the aliases as DNS records.
- If you update any of the chat node alias configuration, restart the Cisco XCP Text Conference Manager.

Clean External Database for Persistent Chat

Configure jobs that monitor the external database and delete expired records. This will ensure that there is always enough disk space for new records.

To clean database tables for Persistent Chat, make sure to select the **Text Conference (TC)** feature under **Feature Tables**.

Procedure

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- Step 1** Log into Cisco Unified CM IM and Presence Administration on the database publisher node.
- Step 2** Choose **Messaging > External Server Setup > External DataBase Jobs**.
- Step 3** Click **Clear External DB**.
- Step 4** Do one of the following:
- For manual cleanup of an external database that connects to the publisher node, select **SameCup Node**.

- For manual cleanup of an external database that connects to a subscriber node, select **Other CupNode** and then select the external database details.
- If you are configuring the system to monitor and clean the external database automatically, check the **Automatic Clean-up** radio button.

Note We recommend that you run a manual cleanup prior to setting up the automatic cleanup.

Step 5 Set the **Number of Days** that you want to go back for file deletion. For example, if you enter 90, the system deletes records that are older than 90 days.

Step 6 Click **Update Schema** to create the Indexes and stored procedures for the database.

Note You need to update the schema only the first time that you run the job.

Step 7 Set the **Number of Days** that you want to go back for file deletion. For example, if you enter **90**, the system deletes records that are older than 90 days.

Step 8 In the **Feature Tables** section, select each feature for which you want to clean records:

- **Text Conference (TC)**—Select this option to clean database tables for the Persistent Chat feature.
- **Message Archiver (MA)**—Select this option to clean database tables for the Message Archiver feature.
- **Managed File Transfer (MFT)**—Select this option to clean database tables for the Managed File Transfer feature.

Step 9 Click **Submit Clean-up Job**.

Note If you have the **Automatic** option enabled, and you want to disable it, click the **Disable Automatic Clean-up Job** button.

Manage Chat Interactions

Changing chat node aliases can make the chat rooms in the database unaddressable and prevent your users from finding existing chat rooms.

Note these results before you change the constituent parts of aliases or other node dependencies:

- **Cluster ID** - This value is part of the fully qualified cluster name (FQDN). Changing the Cluster ID (choose System > Presence Topology: Settings) causes the FQDN to incorporate the new value and the system-managed alias to automatically change across the cluster. For manually-managed aliases, it is the responsibility of the Administrator to manually update the alias list if the Cluster ID changes.
- **Domain** - This value is part of the FQDN. Changing the Domain (choose Presence > Presence Settings) causes the FQDN to incorporate the new value and the system-managed alias to automatically change across the cluster. For manually-managed aliases, it is the responsibility of the Administrator to manually update the alias list if the Domain changes.
- **Connection between the chat node and external database** - The chat node will not start if persistent chat is enabled and you do not maintain the correct connection with the external database.
- **Deletion of a chat node** — If you delete a node associated with an existing alias from the Presence Topology, chat rooms created using the old alias may not be addressable unless you take further action.

We recommend that you do not change existing aliases without considering the wider implications of your changes, namely:

- Make sure that you maintain the address of old chat nodes in the database so that users can locate existing chat rooms via the old alias, if required.
- If there is federation with external domains, you may need to publish the aliases in DNS to inform the users in those domains that the aliases have changed and new addresses are available. This depends on whether or not you want to advertise all aliases externally.