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in

Mountain Lion

Glenn Fleishman

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Read Me First

Welcome to *Take Control of Messages in Mountain Lion*, version 1.0, published in October 2012 by TidBITS Publishing Inc. This ebook was written by Glenn Fleishman and edited by Tonya Engst with technical editing by Dan Frakes.

This ebook helps you navigate the ins and outs of the Messages app in OS X 10.8 Mountain Lion, including how to set up accounts, the proper etiquette when you talk to others, using audio and video chat, and screen sharing.

If you want to share this ebook with a friend, we ask that you do so as you would with a physical book: “lend” it for a quick look, but ask your friend to buy a copy for careful reading or reference. Discounted [classroom and Mac user group copies](#) are available.

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Updates and More

You can access extras related to this ebook on the Web (use the link in [Ebook Extras](#), near the end; it’s available only to purchasers). On the ebook’s Take Control Extras page, you can:

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- **Menus:** Where I describe choosing a command from a menu in the menu bar, I use an abbreviated description that puts the name of the menu ahead of the command. For example, at the end of the previous paragraph, “Go > Back” means “choose the Back command from the Go menu.”
- **Contextual menus:** *Contextual* menus appear when you Control-click various elements on a Macintosh screen, including Dock items and files in Finder windows. To describe opening a contextual menu, I usually I tell you to Control-click an item on the screen. If your mouse offers a right-click option, or if you use a trackpad or other means of opening a contextual menu, you should feel free to use the method you prefer.
- **Application preference:** I sometimes refer to preferences in an application that you may want to adjust. Don’t confuse an application’s preferences with the system-wide settings found in System Preferences. To access an application’s preferences, choose *Application Name* > Preferences. For example, in the program Messages, you would choose Messages > Preferences.

Key Messaging Basics

This ebook focuses on the Messages program in OS X 10.8 Mountain Lion. You'll get a lot more out of it if you have your head around the differences between three types of messages that Messages handles.

Instant Messaging

AOL Instant Messenger, Google Talk, Jabber, and Yahoo Messenger, all supported services in Messages, use *instant messages* (IMs) for communication. As opposed to an email message, which is queued and sent through intermediate servers and may be delivered seconds or minutes later (*asynchronous* communication), an IM is designed for immediate delivery for real-time conversation (*synchronous* communication).

IMs are sent via the Internet, not a mobile phone network, and usually work only within a given messaging network operated by a particular firm (such as AOL or Google) or when connected to a particular server (in the case of Jabber).

Note: Some messaging networks use *gateways*, which interconnect different networks so that a member of one can talk to a member of another. Gateway addressing isn't available in Messages, even though some instant-messaging services, such as Yahoo, offer it through their own clients and Web sites.

Files—such as photos, videos, or word processing documents—may be transferred. Audio or video chats can also be initiated using these instant-messaging systems in Messages. Messages lets you configure any number of accounts for each of these services.

Text Messaging

The cellular phone industry offers text messaging to (nearly) any cellular number worldwide. Text messages are carried over the cellular phone network. Text-messaging is broken out as a separate item in service plans, either with limits plus overage fees or with “unlimited” service.

Text messaging started as the text-only *SMS* (short message service), and messages were (and still are) sent as part of the control messages that allow cell phones and cell tower base stations to interact. Text

messaging was extended with *MMS* (multimedia messaging service), which added photos, audio, video, and more to what could be sent back and forth between phones.

Like IMs, text messages are normally transmitted instantly, and are meant for real-time, back-and-forth communication.

iMessage

The *iMessage* network run by Apple acts like a hybrid of text and instant messaging. These messages—called, appropriately enough, *iMessages*—look and work like text messages, but pass over the Internet, not the phone network. iMessages may be sent and received via the Messages app running on a Mac or iOS device.

On a Mac, each user account can have one iMessage account set up for it. This iMessage account must have a specific Apple ID. You can associate multiple email addresses with a single Apple ID and receive iMessages at any of those email addresses.

On the iPhone, an advantage of iMessages over text messages is that you don't pay per message, or as part of a monthly plan, as you typically do with SMS and MMS messages. If you send or receive an iMessage on an iPhone, the message may count against your data subscription, but only for the data it transmits—unless you send a big image or video, an iMessage is barely a blip compared to, say, a single Web page.

An iMessage Can Become an SMS/MMS Message When Sent from an iPhone

On an iPhone, iOS will try to deliver an iMessage using the iMessage network to any phone number associated with another iPhone so long as that destination iPhone has iMessages set to On in Settings > Messages. If it can't be delivered as an iMessage over the Internet, the iPhone will then try to use SMS/MMS to deliver the message so long as Send as SMS is set to On in Settings > Messages.

This isn't true of Messages on an iPad or iPod touch, or of Messages in OS X, neither of which use SMS/MMS.

Introduction

Messages is a new program in OS X 10.8 Mountain Lion that takes the place of older software called iChat. Messages tries to merge text messaging, traditionally a cellular-phone feature, and instant messaging, which generally involves computer-to-computer message exchanges.

Messages retains iChat's instant-messaging features while adding a new messaging service called *iMessage* that was developed by Apple first for iOS. The Messages app lets you create, send, and receive iMessages with little effort, although I walk you through the subtleties and options that you might miss at first glance.

While you may find that iMessage is enough to communicate with most people you know, it may turn out that some of your colleagues and friends want to communicate via instant-messaging systems like AIM (AOL Instant Messenger, which Apple used for iChat) or Google Talk. The instant-messaging features of Messages are more complicated because their components have been around longer and have been grafted together, although these features are also more powerful and they incorporate audio chat, video chat, screen sharing, and presentations.

The iMessage system and instant-messaging systems (AIM, Yahoo, Messenger, and Google Talk) and servers (Jabber) are separate, but they all appear nearly the same in the Messages program. In this ebook, I help you sort out which one to use when. I also explain how to configure accounts, and help you understand the best way to exchange messages, and even files, with others.

Note: For the basic background on the differences between instant messages, text messages (SMS and MMS), and iMessages, flip back a page or so to [Key Messaging Basics](#).

Note: Apple offered a beta of Messages for 10.7 Lion, but removed the download link before 10.8 Mountain Lion shipped. The company hasn't provided a full release of Messages for Lion. I don't cover the Messages beta for Lion as it was prone to crash and had other difficulties not necessarily found in the final (Mountain Lion) version.

Messages Quick Start

If you need help with a specific aspect of Messages, you can click a link below to start reading this ebook at any point. In particular, if you feel lost in the main Messages window, read [Master the Messages Window](#).

The chapters build on one another, so I recommend that you read sequentially from start to finish—except that, if you’ve never used iChat, you should skip the “What’s New...” chapter.

Learn the basics:

- Understand the terminology for different kinds of messaging systems; see [Key Messaging Basics](#).
- If you’ve used iChat previously, brush up on the changes between iChat and Messages; see [What’s New in Messages for iChat Users](#).

Get started with accounts:

- Find out what messaging services have the options you need; see [Understand Types of Accounts](#).
- Check on what accounts are already functioning in Messages, if any, and set up your accounts; see [Check and Set Up Accounts](#).
- Learn about two-factor authentication with Google Accounts; see [Create a Password for Google Two-Factor Logins](#).

Be polite:

- Know the ins and outs of messaging before you make a faux pas; see [Review Your Etiquette Lessons](#).

Make use of Messages features:

- Figure out when Buddy Lists can be useful to you; see [Bring On Buddy Lists for Instant Messaging](#).
- Understand the parts of the Messages window, a kind of dashboard for the program; see [Master the Messages Window](#).

Interact with others:

- Type and exchange media; see [Exchange Text and Multimedia Messages](#).

- Have a face-to-face (or voice-to-voice) conversation; see [Chat via Audio and Video](#).
- Let a buddy see and control your screen for troubleshooting or to share something, or vice-versa; see [Share Screens](#).

What's New in Messages for iChat Users

The Messages app replaces iChat, Apple's original program for instant messaging and audio/video chat, introduced in 2002. Messages both incorporates iChat features and extends the program to support Apple's new iMessage system. For the benefit of the many long-time iChat users who will read this ebook, here's a summary of how things have changed—and an important opportunity to consider your basic approach to Messages.

The Messages app has all the functionality of iChat in 10.7 Lion, but Apple has switched the program to be less service-based (like AIM-to-AIM or Google Talk-to-Google Talk) and more person-to-person based. You can either think like a Mountain Lion and adopt the new way of working in which a single Messages window handles nearly everything, or you can keep your iChat attitude, relying mostly on the legacy Buddy List windows that are still available.

Let me explain these two world views:

- **Keep using buddy list:** Start chats, screen-sharing sessions, and audio/video talks in a buddy list, and use the Messages window only for actual back-and-forth chat.
- **Take advantage of the Messages window:** Start interactions in the Messages window, and use buddy lists only to manage buddies. Everything else you handle in the new way.

To help you with your transition from iChat to Messages, I talk more about each option next. The features noted in this chapter are explained more fully later in the ebook.

Keep Using the Buddy List

The notion of a buddy list still exists in Messages, and it works just as it did in the 10.7 Lion (and earlier) releases of Mac OS X. You may also still choose, as in Lion, to have a separate buddy list for each instant-messaging account at each service, so you can have, for example, both

Open a Channel

Messages lets you set up as many as six different kinds of service accounts, each with its own limitations and properties. In this chapter, you can learn which account types are right for your needs. After that, you'll find directions for setting up each type of account in Messages.

Note: If you are unsure of the differences among instant messages, text messages, and iMessages read [Key Messaging Basics](#), earlier, before starting this chapter.

Understand Types of Accounts

You will likely wind up creating accounts at multiple services because it's unlikely that everyone with whom you communicate uses the same service. Further, there may be times when iMessage is the most appropriate messaging service, even if you routinely use other services, because iMessage can reach people on both iOS devices and computers, making it more likely that a recipient will receive the message instantly.

Each type of messaging account is free. Each one also has a set of capabilities that allow certain types of interactions, as summarized in **Table 1**, just ahead. But first, let me run through what's possible:

- **Send text messages:** Communicate back and forth with typed or pasted text, whether using cellular SMS or instant messages.
- **Participate in a group chat:** Exchange textual messages among multiple parties in a single conversation.
- **Exchange multimedia:** Transfer images, audio, and video back and forth.
- **Exchange files:** Send and receive files by dragging them into the Messages window or selecting them using a navigation dialog.
- **Participate in an audio/video chat:** Talk with a remote party by microphone and/or camera.

Review Your Etiquette Lessons

Text and instant messaging aren't new, and implicit rules of etiquette have emerged over the decades about how to interact through these communications methods with people whom you know. But recent changes have made it easier to interact with people you barely know, as well as to send a message at an inopportune time without realizing that it will disturb the recipient.

This chapter examines what you can do to send signals about your availability, how you can check whether someone else wants to hear from you, the ins and outs of using emoticons, and how to end a conversation politely—but firmly.

While AIM and Yahoo Messenger continue to offer more or less the same kinds of instant-messaging services that they always have, Apple and Google have made changes to how you can find and interact with other people over their messaging services:

- **Google Talk and Google+:** When you interact with someone in Google+, Google has made it a one-click—and irreversible—operation to add that person to your list of potential chat participants. This can clog your list with people you barely know and may not want to have *synchronous* (that is, live and interactive) conversations with, even if they were fine for *asynchronous* (delayed) interactions, such as forum posting or email. Worse, all the people added to your Google Talk list now can see you as well.
- **iMessage always:** Apple, meanwhile, has added iMessage support to the Mac. While I applaud that in principle, and I use it all the time, iMessage on OS X expands text messaging from phones and iOS devices to tens of millions of people on the desktop. Because iOS, most notably on the iPhone, doesn't provide any way to block incoming messages without disabling iMessage entirely, any person with iMessage access on any computer can message you at any time.

Bring On Buddy Lists for Instant Messaging

For instant-messaging accounts, you can set up Buddy Lists of people with whom you converse frequently. A Buddy List lets you control the status you offer to other people on the same network, and it lets you quickly view your buddies' statuses and start conversations with those buddies. You can have a separate buddy-list window for each account at each service—if you're connected to Google Talk and AIM, for instance—or consolidate them in a single list.

You don't need to manage Buddy Lists at all, if you choose not to. But some IM services (and some ways of configuring those services in chat programs) limit contact methods or impose other hurdles for people who are not in each other's buddy lists.

It's possible to never put a contact into a buddy list, as well as to keep the buddy list windows closed, and instead select IM accounts in the main Messages window for messaging sessions. If you go that route, you can bypass this entire chapter.

Decide If You Want Just One Buddy List

The first decision to make when setting up Buddy Lists is whether you want one list called Buddies or a separate list for each account at each service. Don't get too wrapped up in this decision; it's easy to change your mind later. Directions for working with a Buddy List differ depending your decision here, so it makes sense to sort that out first.

The advantage of a consolidated list is that it offers a single place to find everyone with whom you have a chat relationship, and fewer windows if you have accounts at multiple services (or multiple accounts at one or more services). The disadvantage is that if, like me, you have many buddies at different services, your scrolling list is too long. Another problem is that if you're a buddy with the same person on multiple services, you may have to look around a bit to figure out which account you want to message for that person.

Master the Messages Window

The Messages window is your dashboard in the Messages program, and this chapter provides a graphical overview, along with referrals to the parts of the ebook that have the specific details about each labeled interface element.

After launching Messages and going through any initial setup dialogs that it might present, a window like the one shown in **Figure 19** appears. If not, choose Window > Messages (Command-zero).



Figure 19: The Messages window and its labeled parts.

- ❶ The Search field lets you look through your active and previous conversations; see [Read Past Messages](#).

The Compose New Message  button starts a new conversation. See [Find Someone](#).

- ❷ The Conversation List shows all conversations that you've left open, which can include ones that are in progress or ones in the past that you haven't closed. The Conversation List is discussed throughout the upcoming chapters, notably in [Exchange Text and Multimedia Messages](#), and especially in [Arrange Conversations](#) in that section.

Exchange Text and Multimedia Messages

One of the main reasons to use Messages is to type in little bits of text and send them to other people and receive the same. The Messages app also lets you mix in images, video, PDFs, and files of all kinds. This chapter covers the full range of tasks.

I start by explaining several ways you can find the right account for a person in “Find Someone,” just ahead. We then move to the details of composing and receiving text-only messages in [Exchange Text Messages](#).

You may want to send a picture, moving images, or files to another party, which [Send and Receive Media and Files](#) covers. When you’re done with a chat, can you finish it? Not exactly, I explain in [End a Chat](#). Messages also lets you [Start a Group Chat](#) with multiple people, although the details vary by service.

Finally, you may want to [Read Past Messages](#) in a conversation by scrolling back or searching through archived chats.

Find Someone

To send a message, you must first tell Messages to whom to send it, and at which messaging service. Messages organizes this process by name, rather than by email address, phone number, or instant-messaging service account. This makes it convenient to start messaging someone, because you can easily access all the contact methods that you’ve already put into a card in the Contacts app.

In this topic, I first point out some new ways of adding data to Contacts that you might not be aware of. I then explain how to start a message in several different ways:

- **Type a few characters:** If you don’t have a reason to use a different method, I suggest that you start with this technique, because it is straightforward and because I give drawn out directions for it. Flip ahead a page or so to [Start Typing a Name](#).

Chat via Audio and Video

Messages supports two kinds of multimedia chat: FaceTime and a generically labeled alternative that's been around since the Messages program was named iChat. Some people you talk with may have multiple options for audio and video chat.

This chapter examines which services are available to you, and which might suit your needs.

Note: Rather than give Audio and Video obscure labels like “legacy iChat Audio” or “SIP-compatible Video,” I’m using the terms Audio and Video as Apple does.

Examine A/V Chat Options

Messages lists FaceTime, Audio, and Video as discrete options in the Video  drop-down menu. Despite its use of widely accepted industry standards, FaceTime’s conversations work only with the FaceTime app from Apple for iOS and Mac OS X. Audio and Video rely on similar standards, but these standards are packaged in a way that allows them to work across Bonjour, AIM, and Google Talk.

The practical differences in Messages between FaceTime and Audio/Video are summarized in **Table 2**.

Share Screens

With the Screen Sharing feature in Messages, you can see the display (or displays) of a remote computer, as well as work on that computer using your local keyboard, mouse, trackpad, or touchpad. Being able to show someone your screen or see hers can be useful for demonstrations or personal troubleshooting.

Messages creates a session between two buddies that allows one to control the other's computer. Control works only in one direction, based on who requests or offers to share a screen.

Warning! *Screen sharing isn't something you should engage in casually. If you allow a buddy access to your screen, the buddy has full control until you disconnect.*

The screen-sharing feature in Messages works between two accounts on the same service: AIM, Google Talk, or Bonjour. It doesn't require the password of the other party.

Messages allows either party to *initiate* or *request* screen sharing. Thus you can ask a buddy to share her screen, or offer to share your screen with a buddy.

Note: For more about other methods of screen sharing, including on the same network, via Back to My Mac, though Skype, or with iOS apps, see my ebook [Take Control of Screen Sharing in Lion](#).

Start a Screen-Sharing Session

You have many choices for initiating screen sharing in Messages, none of which is necessarily superior to any other. In every case, you will see both "Share My Screen with *Account*" and "Ask to Share *Account's* Screen" as menu options.

You can start screen sharing from either the Messages window or a buddy list.

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About the Author



Glenn Fleishman has written about technology in all its many forms for a couple dozen years, starting with *Aldus Magazine* all the way through to his current gigs at the *Economist* (where he writes for the online *Babbage* blog and in print for the Technology Quarterly section), *Macworld* (senior contributor), and the *Seattle Times* (columnist).

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Glenn was trained as a typesetter, and he lives in Seattle with his wife and two sons. He appears regularly on the geeky podcast *The Incomparable*, where he talks about books, movies, Doctor Who, and other topics.

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About the Publisher

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Adam and Tonya are known in the Apple world as writers, editors, and speakers. They are also parents to Tristan, who thinks ebooks about clipper ships and castles would be cool.

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