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MEDICINE**

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# **LOYOLA MEDICINE**

## **GROUPWISE 7.0**

**USER GUIDE  
2008**

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# INTRODUCTION TO GROUPWISE 7.0

## OBJECTIVES

- ❖ Using the Home View
- ❖ Customizing Panels
- ❖ Using/Customizing the Navigation Bar
- ❖ Toolbars and Shortcuts
- ❖ QuickViewer
- ❖ Using the Mailbox
- ❖ Sending Messages
- ❖ Formatting and Spell Checking
- ❖ Mail Properties
- ❖ Replying to Messages
- ❖ Resending, Retracting, and Routing Messages
- ❖ Using Attachments
- ❖ Assigning a Category
- ❖ Junk Mail Handling

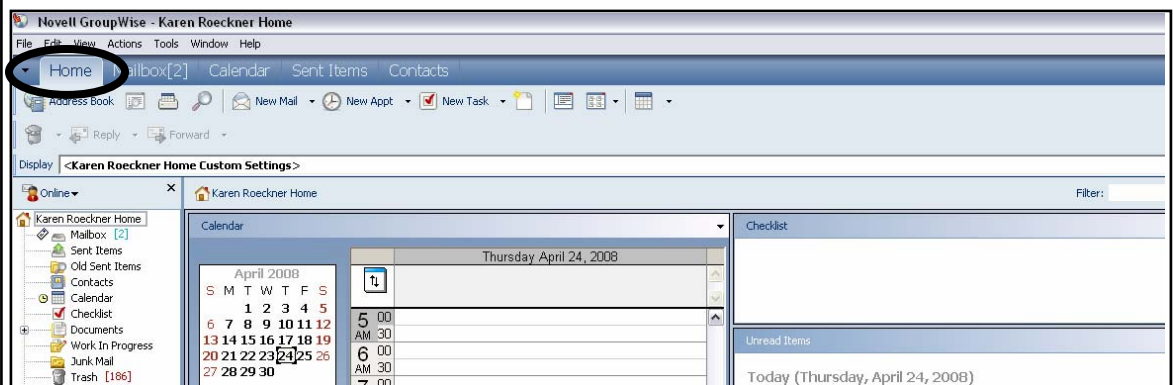
## Introduction

This training manual is written specifically for GroupWise 7.0 users who have Windows XP on their computers. This manual concentrates on the office features available in GroupWise 7.0. Some of the topics covered in this training manual include creating and sending mail, creating a checklist, handling junk mail; using the calendar and address books; creating appointments, tasks, and folders, as well as many other GroupWise features.

This manual assumes that you have a working knowledge of operating within the Windows environment.

## The Home View

When you start GroupWise 7.0, Novell GroupWise – The **Home View** is your default screen. The Home View displays your important information in a column view using panels. The default displays your Calendar, checklist items, and unread messages.



By default, the Home Folder displays a 2-column view. The first column displays a graphical **calendar** in a week view showing only one day of the week. The second column displays your **Unread Items and Checklist items**. You can modify the number of columns and what is displayed in the Home Folder.

## Customizing the Panels and Number of Columns

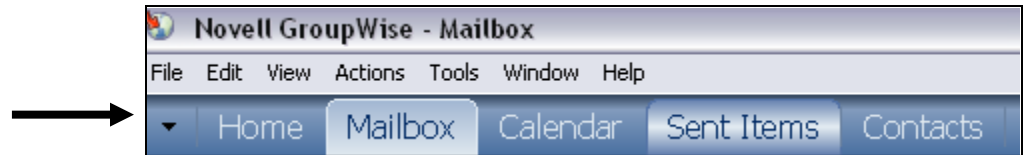
1. **Right-click the folder** that you want to modify the panels for, then click Properties.
2. Click the **Display tab**.
3. Select **Panels** from the View By drop-down list.
4. Click **Customize Panels**.
5. **Select whether you want to view the panels in one** or two columns.
6. Select from the list of available panels, or create your own panels by clicking New Panel.
7. Click **Add next** to the column you want the column to display in.
8. (Optional) Click Move Up or Move Down to position the column where you want it to display.
9. Click **OK**.

## Adding a Panel

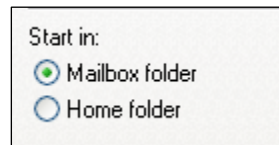
1. Click the **panel drop-down arrow**, then click Add Panel.
2. Click **New Panel**.
3. Enter the **panel name** in the Name the New Panel field.
4. Select if you want the panel to display a folder or the Address Book. If you select a folder, click Change Folder to select the folder to display the contents of. If you select Address Book, use the drop-down list to select the address book you want to display.
5. Select a display setting from the Choose Display Settings drop-down list.  
Calendar: Displays the panel as a graphical calendar.  
Checklist: Displays the panel as a checklist.  
Details: Displays the details for items in the panel.  
Discussion Thread: Displays the items in the panel grouped according to threads or click More Display Settings for additional display settings.
6. Click **OK**, then click **Add to display** the panel.

## Navigation Bar/Appearance Scheme

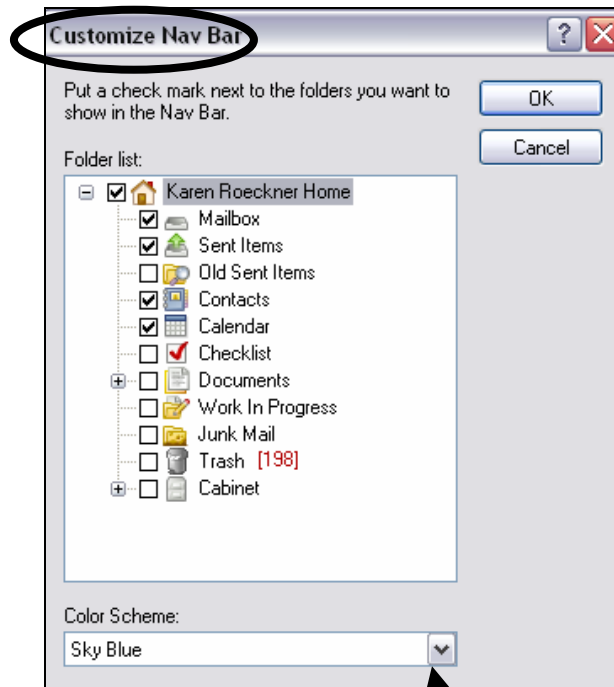
The Navigation bar is a new functionality in GroupWise that will list your most frequently used folders. By default, the Navigation Bar includes tabs for your Home, Mailbox, Calendar, Sent Items, and Contacts folders.



To select the **Mailbox or Home** as your default folder, go to **Tools, Options, Environment** and select your option.



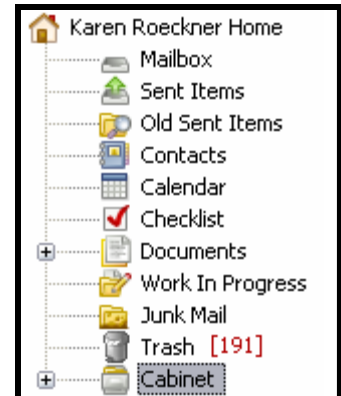
1. Right Click the Navigation bar to add other tabs or drag and drop items to move them to the tabbed folder.



2. You can also **change the color** scheme from the Navigation Bar Customize Nav Bar screen.

**Listed below is a brief description of your folders:**

- **Mailbox:** Receives all incoming e-mail messages. Shows how many items in your mailbox with a number next to "Mailbox".
- **Sent Items:** Shows you all the messages you have sent.
- **Contacts:** View, update, delete, and add information to the contacts in your address book.
- **Calendar:** Displays your calendar and views your daily schedules and tasks.
- **Checklist:** Allows you to mark and organize items in your Mailbox which require follow-up.
- **Documents:** Contains folders of documents you have created.
- **Work in Progress:** Keeps drafts of unsent messages until you are ready to send them.
- **Junk Mail:** Provides the ability to automatically filter unwanted e-mail as it is received.
- **Cabinet:** Holds messages you file for storage.
- **Trash:** Contains items you delete, and shows the number of items in the trash next to "Trash".



### Mailbox (space) Capacity

You will now be able to see the percentage of mailbox space that you have utilized in GroupWise. This information will appear at the bottom right-hand corner of your GroupWise window. Once you exceed **75%**, you will be notified at startup that you need to archive/delete messages. Once you hit 100%, you will be unable to send or receive mail. The current limit is 200Mb per mailbox, and the maximum attachment size that can be sent is 25 Mb.



## GroupWise Toolbars – Main (Mailbox) toolbar

1. Address Book: Open your GroupWise Address Book.
2. Properties: Displays the properties for the selected item. (Alt + Enter -- shortcut to display properties.)
3. Print Calendar. Print your calendar.
4. Find: Performs a search.
5. Create New Mail: Create and send a new mail message. (Ctrl. + M )
6. Create (Schedule) New Appointment: (Ctrl + Shift + A)
7. Create New Task: (Ctrl + Shift + T)
8. Create New Document: (Ctrl + D)
9. Quick Viewer: Displays the GroupWise QuickViewer in the lower half of the main window (Ctrl + Q)
10. View By: Select to view your GroupWise Mailbox by Details, Discussion Threads, as a Calendar, or as a Checklist.
11. Open Calendar: Opens your GroupWise Calendar in a new window.

1      2      3      4      5      6      7      8      9      10      11



## Toolbar Shortcuts

The main default toolbars in GroupWise contain the most commonly used icons. Toolbars can be customized

1. **Right-click** on a toolbar
2. Select **Customized Toolbar**
3. **Click** the **Customize** tab
4. **Drag** the desired icon/picture to the toolbar.

## Ctrl/Alt + letter functionality

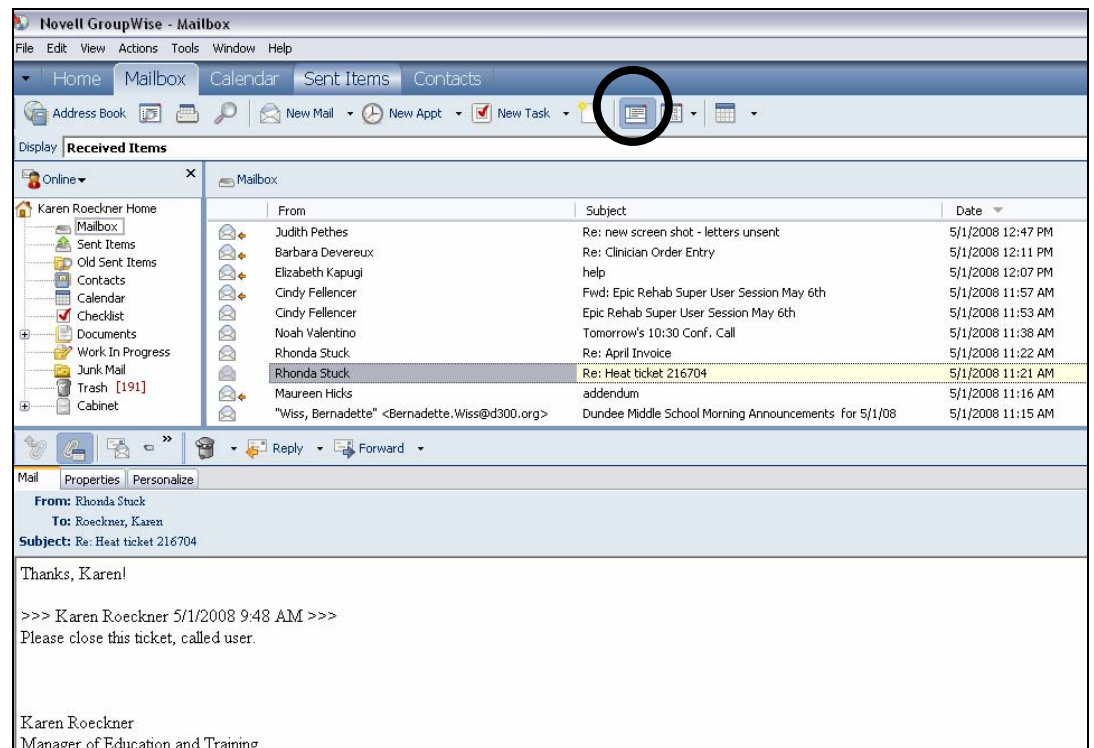
There are now many **Ctrl/Alt + letter** combinations that allow for quick short cuts to menus.

Function	Shortcut
Properties	Alt + Enter
Find	Ctrl + F
Create New Mail	Ctrl + M
Schedule New Appointment	Ctrl + Shift + A
Create New Task	Ctrl + Shift + T
Quickviewer	Ctrl + Q
Send	Alt + D
Cancel	Esc
Attach a File	Ctrl + L
Save	Ctrl + S
Font	F9
Spell Check	Ctrl + F1

## QuickViewer

QuickViewer displays all three panes at once. You can see your folders, list items, and the contents of the selected item.

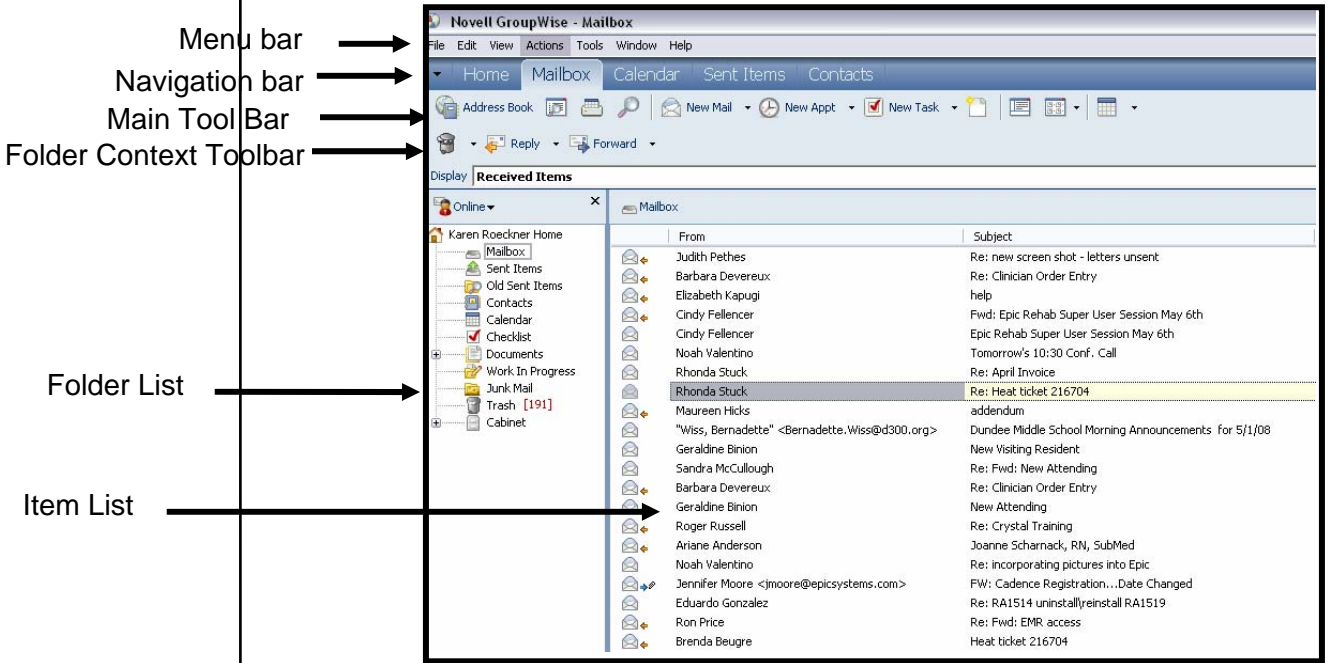
1. **Click** on an **item** in your Item List (For example: an incoming mail message).
2. **Click** on the **QuickViewer** button.



3. Notice the information displayed in all three panes.
4. **Click** on the **QuickViewer** button to close QuickViewer.

## Using the Mailbox

All incoming items in GroupWise are received in your Mailbox. In the Mailbox folder you can open, read, delete, and perform many actions on your GroupWise items.



The item list contains each item with an icon that represents the item type, who the item is from, the subject of the item, and finally the date and time the item was sent. This area can be customized.

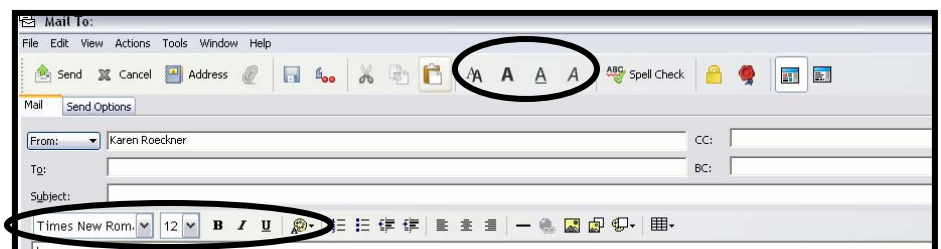
## Sending Mail Items (including Attachments)

You can use “**Send**” to send all kinds of items in GroupWise. Mail and phone messages, appointments, tasks, and reminder notes are all included in this group. They are essentially all sent the same way.

1. **Click** on the icon for the item you want to send (i.e. **New Mail**), or choose the drop-down arrow next to the icon).
2. Type the recipient(s) name(s) in the **To:** box. You can also select the name(s) from the **Address Book** (which will be discussed in Module 2). Follow the same procedure for carbon or blind carbon copies.
3. Enter a description in the **Subject** box.
4. Type a message in your **Message** box.
5. If you have an attachment (document) you want to send with the item, **Click** on the **Attach file** icon (paper clip), and select any files you want to send. Further explanation of attaching a document is outlined later in this Module.
6. **Click** “**OK**”.
7. If you want to add special send options to your item, **Click** on the **Send Options** tab and specify what you want (see instructions below on how to do this).
8. Once you have finished with your item, select “**Send**”.

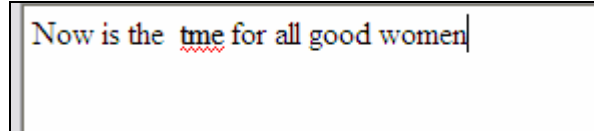
## Formatting a Message

1. You have several options to emphasize text in a message. You can **bold**, *italicize*, and underline the message by **Clicking** on the icons on your formatting toolbar.
2. To change the font for text that you have already entered in the message field of your message, **highlight** the text you want to change and **Click** on the **Font** icon on your formatting toolbar.
3. You can also **Click** on the icon on your formatting toolbar before you begin entering the text; or, **highlight** the text, **right click**, choose **Font**, and apply your formatting.

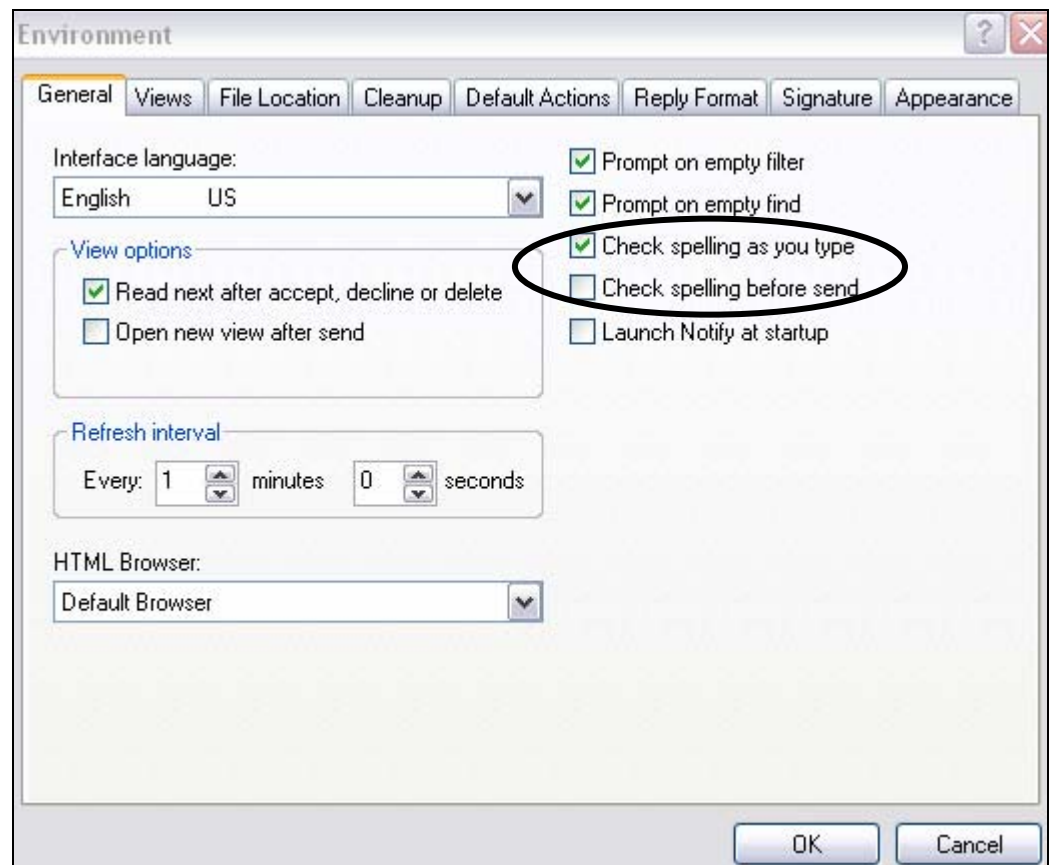


## Spell Check Your Message

GroupWise 7.0 will now immediately recognize any misspelled words. You can **right click** on any word that appears with the **red line beneath it** and select the correct spelling.



If you also want to have GroupWise spell check your messages before they are sent, **Click on Tools, Options**, then **click on Environment, General**, and make sure the box **“Check spelling before send”** is checked.



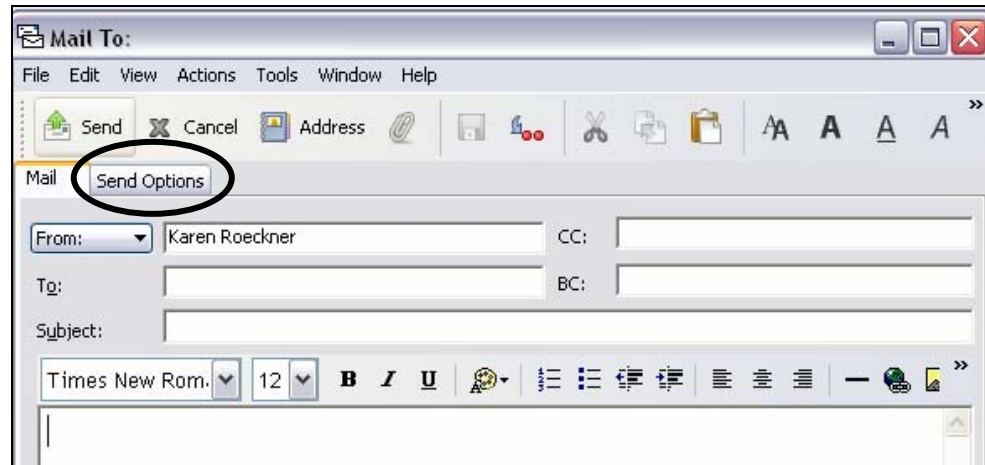
If you do NOT want to have GroupWise spell check as you type, **Click on Tools, Options**, then **click on Environment, General**, and make sure the box **“Check spelling as you type”** is unchecked.

## Mail Message Properties – Send Message Options

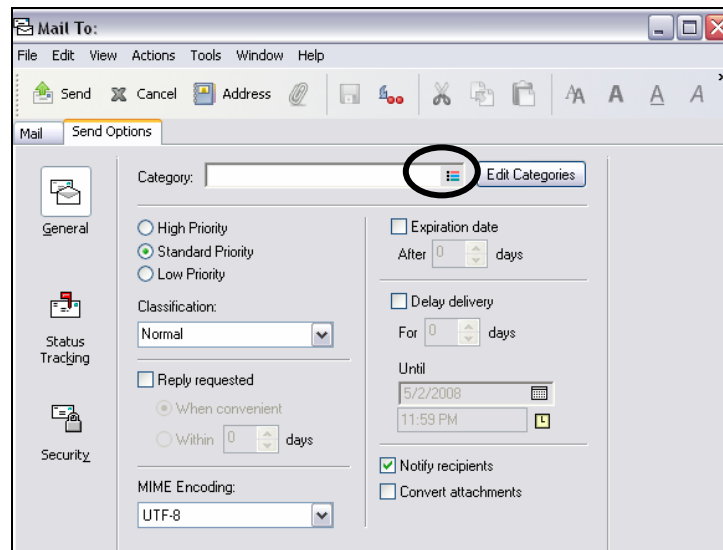
All items created in GroupWise have properties associated with them such as the **Send Options**. The send options allow for levels for priority.

A tab is available for Send Options when creating a message as well as messages can be sent color coded by using categories.


1. **Click on New Mail and Click on Send Options**



2. **Click on the drop down icon for categories. Select a category. Click on Mail to go back to your mail message.**



## Opening a Mailbox Item

1. Select the **Mailbox** icon in the Folder list. 
2. **Double-Click** the item you want to open or **right-click** on the item and select **“Open”**.
3. When you are completed with the mail message, select **“Close”**.







## Reading Mail

All mail (opened and unopened) is stored in the Mailbox. From the Mailbox folder, you can open, read, delete, print, view properties, and perform other actions on your mail items. By **right-mouse clicking** on a mail item, you have multiple options to perform on that message.

Incoming mail, appointments, tasks, and notes appear as items on the right side of the screen and are listed in chronological order; the most recent messages appear at the top of the list (or according to how you have the columns sorted). Incoming unopened mail is highlighted. Each message lists the name of the sender (From), the subject of the item, and the date and time it was sent.

A closed envelope icon indicates an item has **not** been opened; an open envelope indicates an item has been opened. For a complete list of icons and their definitions, refer to the Help section in GroupWise (Help, Help Topics, Index, and type in the word “icons”).

1. **Double Click** on a message to read it. Use your scroll bar to move through the text of your message.
2. If your message has an attachment, you can **Double Click** on the attachment to open it. You can also **Right Click** on the attachment to save the attachment without opening it. Further explanation of attachments is given later in this module.

<b>Unopened</b>	
<b>Opened</b>	
<b>Opened, forwarded</b>	
<b>Opened, replied to</b>	
<b>Opened, replied to with an attachment</b>	
<b>Open with attachment</b>	

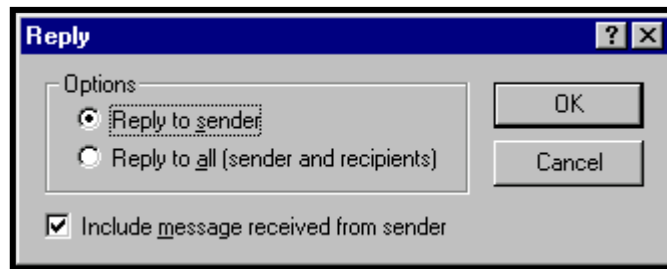
## Replying to a Message

You have the following options when you reply to a mail message:

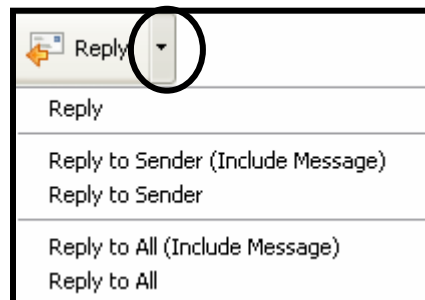
- **Reply to Sender** -- reply to sender only
- **Reply to All (Sender and Recipients)** – reply to the original sender and all names in the TO:, CC:, and BC: fields
- **Include Message Received from Sender** – include the sender's original message with your reply



When you **Click "Reply"**, you will see the window below.

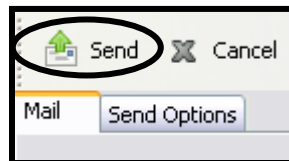


However, if you choose to **click** the drop-down arrow next to **"Reply"** on the toolbar, you will have many options to choose from.



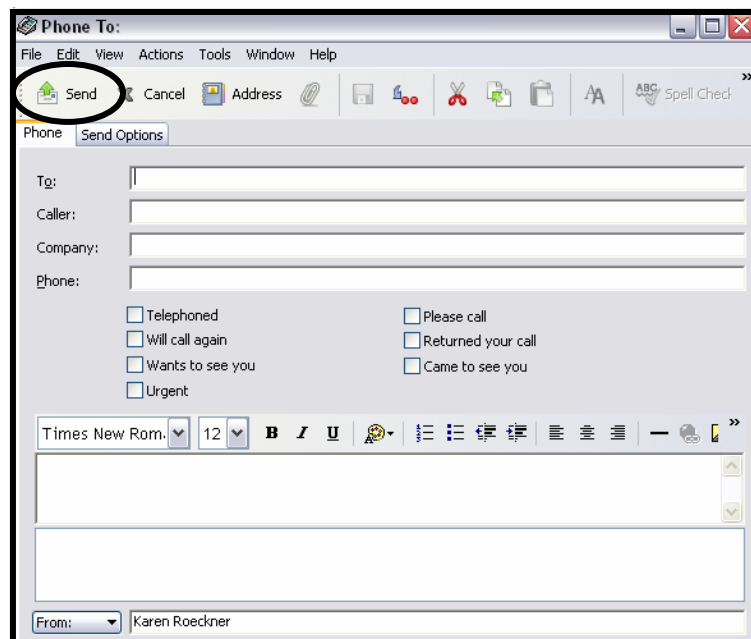
## To Reply to a Message

1. Select the GroupWise item.
2. **Double-Click** the item to open it.
3. Select **Reply** or **Click** the drop-down arrow next to **Reply**.
4. Select the option of how you would like to reply (to sender, to all, include message, etc.).
5. **Click OK** (you only have to do this if you selected "Reply").
6. Type your reply message and select **Send**.



## Sending Phone Messages

1. In the Main GroupWise Window select **File, New, Phone Message**.
2. Select the recipient(s) from the Address Book and **double-click** the people you want to send the message to.
3. **Click "OK"**.
4. Enter the appropriate information in the caller information boxes, check boxes, and message area. There is also an area for attachments.
5. **Click "Send"** when you are finished.

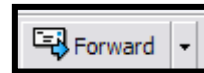


## Forwarding a Message

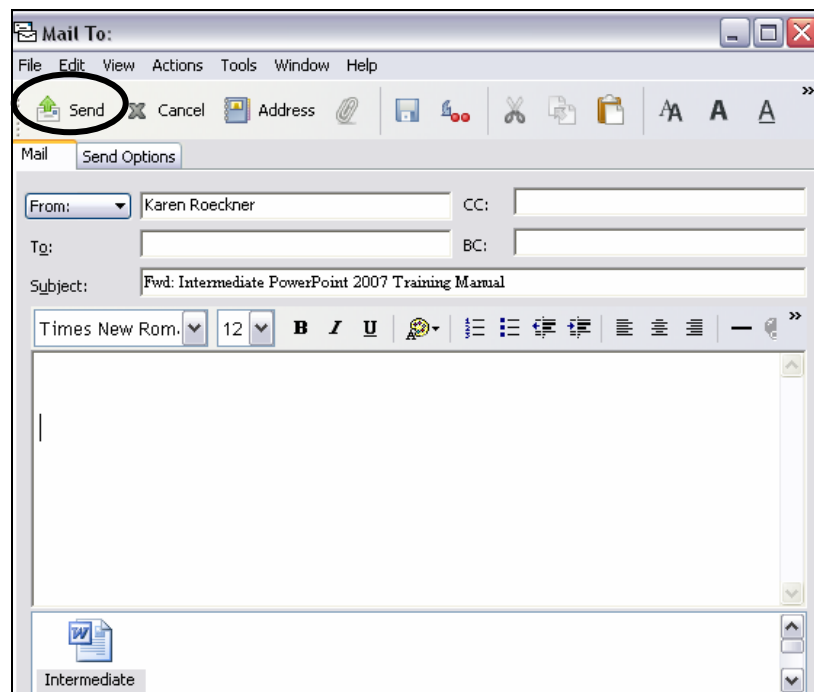
You can send a mail message that you have received to another user by forwarding the message. By using this option, you are sending a new message with the old message as an attachment or embedded in the text of a new item. The system will automatically add the letters "Fwd" as part of the subject field.

1. **Double click** (or **right-mouse click, open**) on a message to open a mail message.

2. **Click** on the **Forward** button.

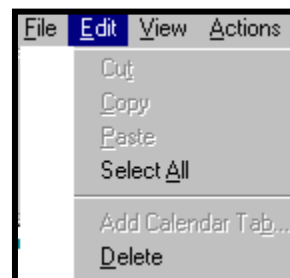


3. Enter your text, and **click** on **Send**.



## Deleting Mail

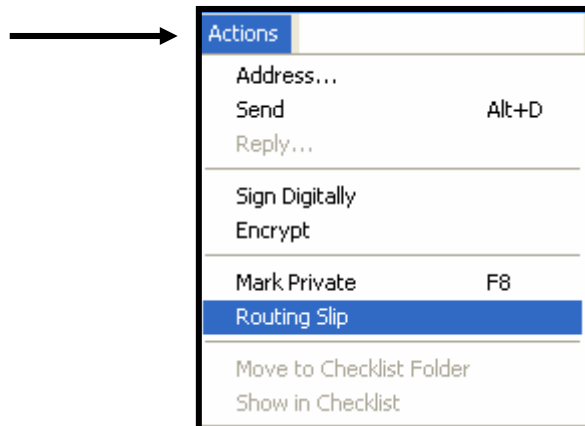
To delete a mail message, **highlight** the message and **press Delete** or **Click** on **Edit**, then **Delete** from your main menu.



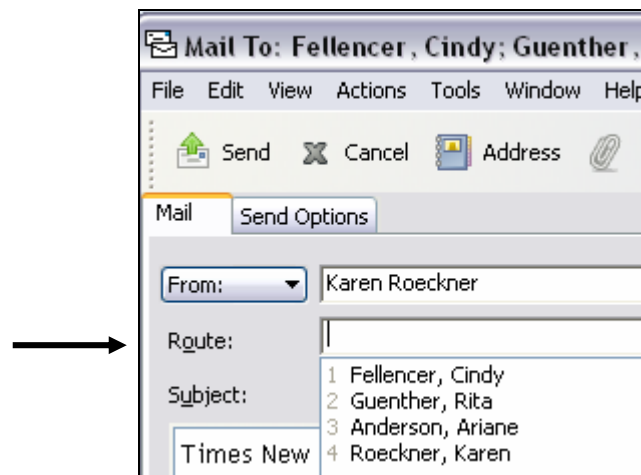
## Routing Messages

Items can be sent to individuals in a specific order by using a routing slip. Once the individual has read and completed the item, they select **completed** and the message will be sent to the next recipient automatically.

1. Create a **New Mail** message
2. **Click on Actions**, select **Routing slip**



3. In the **Route:** field, **enter the names of recipients** in the order you would like the message delivered. **Press Enter** after each name.



4. Enter a **Subject** and **Text** and **click on Send** message.

## Options for Sent Items folder - Resending an Item

Several icons are now available once you **click** on the **Sent Items folder**. A sent message can be Deleted, Retracted, Retract and Delete, and Resent by **Clicking** on the icons listed. For example, a message can be resent.

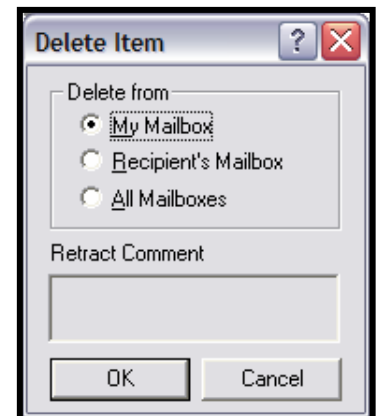
1. **Click** on the **Sent Items** folder.
2. **Highlight (click on)** the sent message.
3. **Click** on the **Resend** icon.



## Options for Sent Items folder – Retracting an Item

If you realize that you have made a mistake after you have sent a message, you might want to retract it before the recipient reads it. If you want to do this you will want to check the status of the message to make sure they have not read the message (see the next section on how to view properties). **YOU CAN RETRACT ITEMS, SUCH AS MAIL AND PHONE MESSAGES, FROM RECIPIENTS WHO HAVE NOT YET OPENED THEM OR DELETED THEM.** You can retract items such as Appointments, Notes, and Tasks if they have been opened or not.

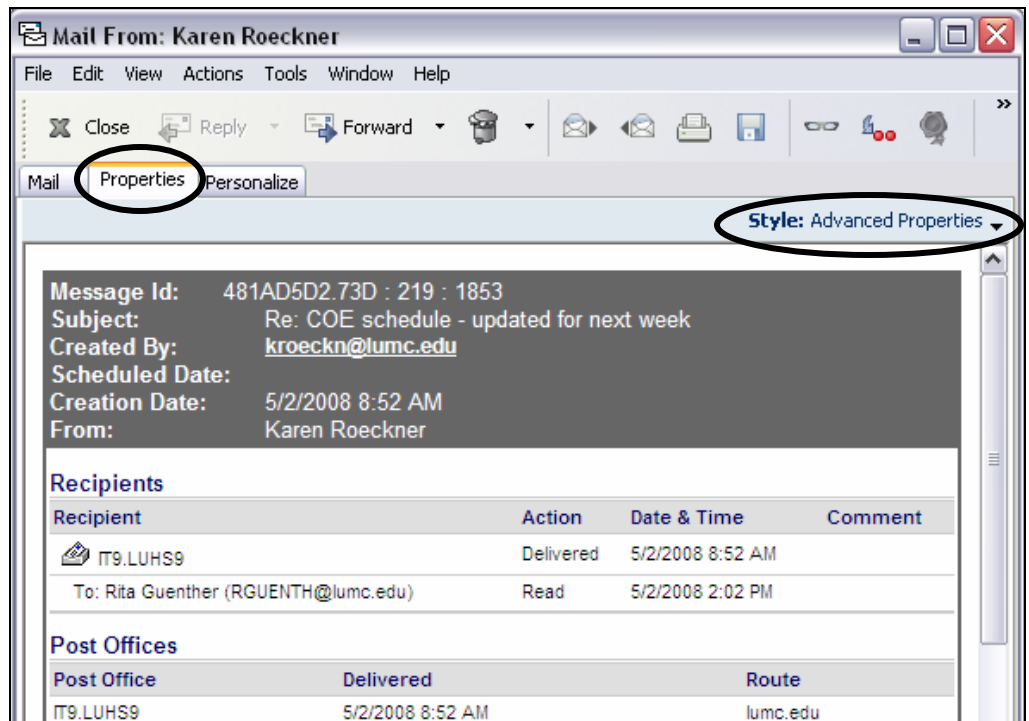
1. **Select** the **Sent Items** folder in the Folder List.
2. **Highlight (click on)** the item you want to retract.
3. **Click Edit, Delete** (or **press Delete** on your keyboard), or **right-mouse click, Delete**.
4. The “delete item” window appears. There are three options to choose from. Choose one. **Click “OK”**
5. You can also **click** on the “**Retract**” or “**Retract and Delete**” button on the toolbar.



## Checking the Status of the Message (Viewing Properties)

GroupWise allows you to track the status of items by using the Properties button. You can check the status of any message you have sent.

1. **Double click** on the message to open the message
2. **Click on the Properties** tab. Select the Style: **Advanced Properties** to see all details on Sent Messages.

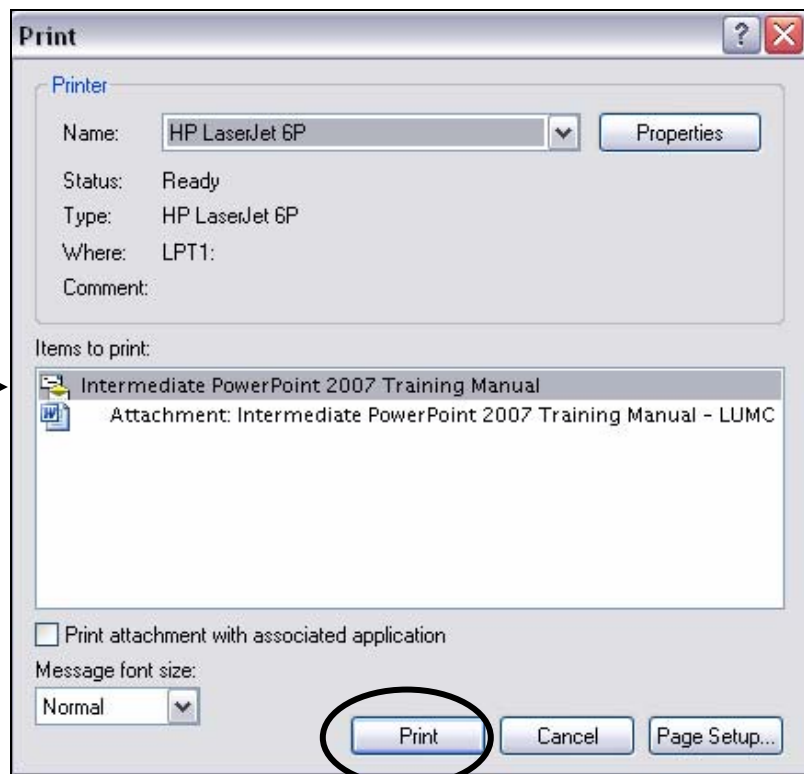


3. You will now be able to see when the item was delivered, opened, and the date and time it was created.
4. When you are finished looking at the information, you can close this window by **clicking** the “x” at the top of the window, or you can **select** the “Close” button.

## Printing a Message

1. **Double click** on the item you want to print (or **right-mouse click**).
2. **Click** on the **Print button** in the toolbar or **click** on **File, Print**. The Print dialog box appears, displaying the items you have selected for printing.
3. Choose which part of the message you want to print. You can print the message or the attachment, or both.
4. To print both the message and attachment(s), **click** on the **message title** and hold down the **CRTL key** to highlight the attachment and then **click** on **Print**.

E-mail message

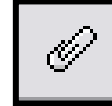


## Attaching Files

You can attach files to your message and you can also cut and paste information from another message into your message.

To attach a file:

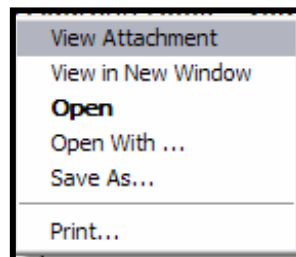
1. Create a new message and then click **“Attach”**
2. Select the file(s) you wish to attach. You may need to locate the file in another folder. You can select multiple files to attach to one message by holding down the **CTRL key** and **selecting** each file you want to attach.
3. Click **“OK”**.
4. Click **“Send”**.



## Viewing Files

If you have the application used to create the file, you can open the attachment. If you receive a mail message that contains an attachment and you do not have the application to open it, you can view it instead.

In GroupWise 7.0, you also have the option to try and open the file with an application that may allow you to open the file – **Open With**. For example, you could try opening a Lotus file using Excel.



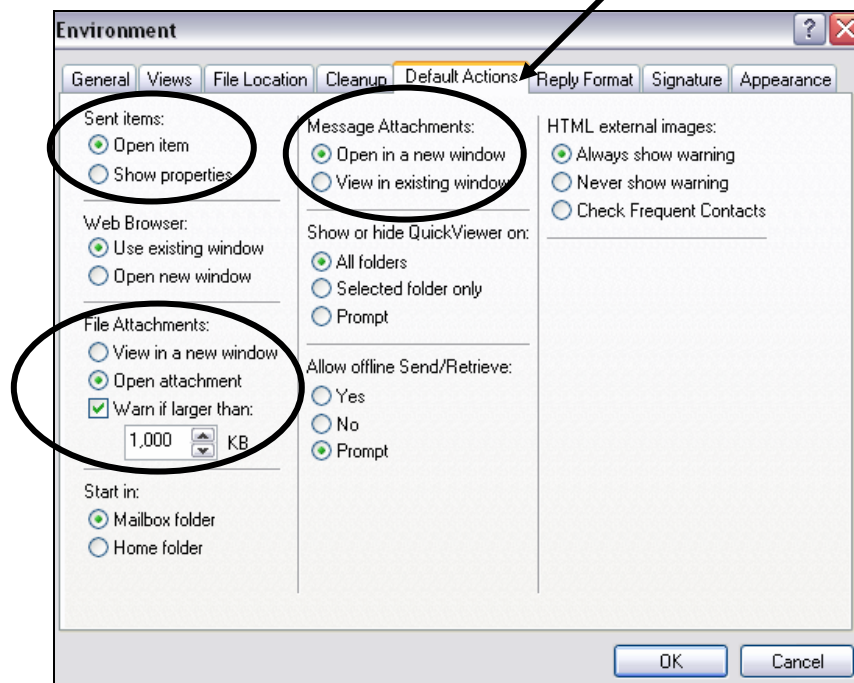
If you cannot open the file, you can save the file in a folder and then try opening it using an application that might be compatible.

## Opening and Viewing an Attachment

1. **Open** the GroupWise item that has the attachment you wish to view.
2. **Double-click** the attachment to open it (or **right-click** on the attachment, and choose what you would like to do with the attachment -- i.e. Open, Save, etc.)

You can change the default for opening an attachment in GroupWise. To change what happens when you double-click an attachment in GroupWise:

1. **Click on Tools, Options, Environment, Default Tab**



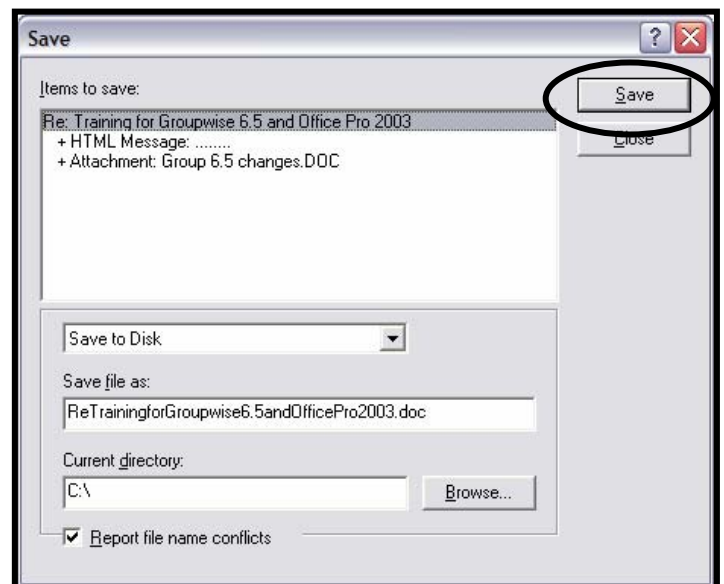
2. Select the **Default Actions** tab
3. Choose your option under **File Attachments**.
4. **Click "OK"**.

## Printing an Attachment

1. Open the item that contains the attachment.
2. Select **File, Print** (or **right-mouse click, Print**).
3. From the list, select the item (or items) you want to print. If you want to select more than one item, hold the **Shift** key down and **click** on the items you want (in order); if they are out of order, then hold the **CTRL** key down and **click** the items you want to print.
4. Select **Print**.

## Saving Items and Attachments

1. Open your Mailbox (or Sent Items) folder.
2. Select an item you want to save.
3. Select **File, Save As** (or **right-mouse click** the item and **Click "Save As"**).
4. Choose the item you want to save.
5. Type a file name for the item.
6. The item will be saved into the default directory (Current Directory). If you want the item saved in a different directory, then **select Browse**.
7. Select the folder you want to save the item in.
8. **Click "OK"**.
9. **Click "Save, Close"**.

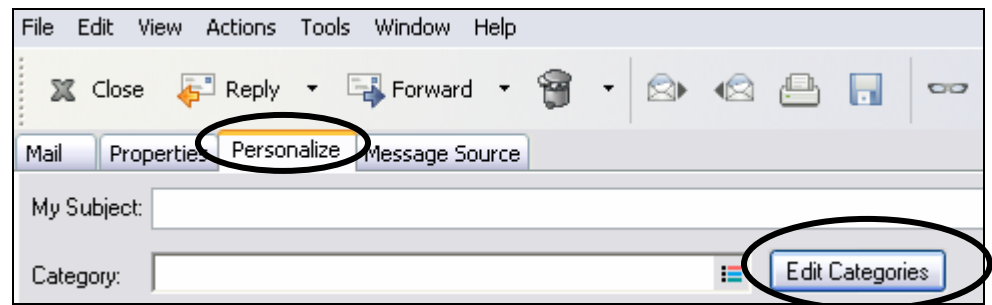


## Assigning a Category

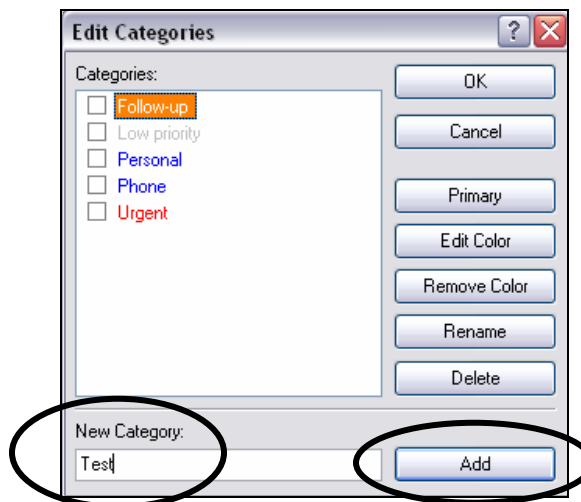
You can assign items such as incoming mail to a particular category. This helps you manage and organize your GroupWise items more efficiently. Items that have been assigned a category are color coded and shown in the color of their particular category. You can edit and remove colors as you wish. You can also sort and filter items according to their categories.

### To create a category

1. With a message open, click on **Personalize** and click on **Edit Categories**.

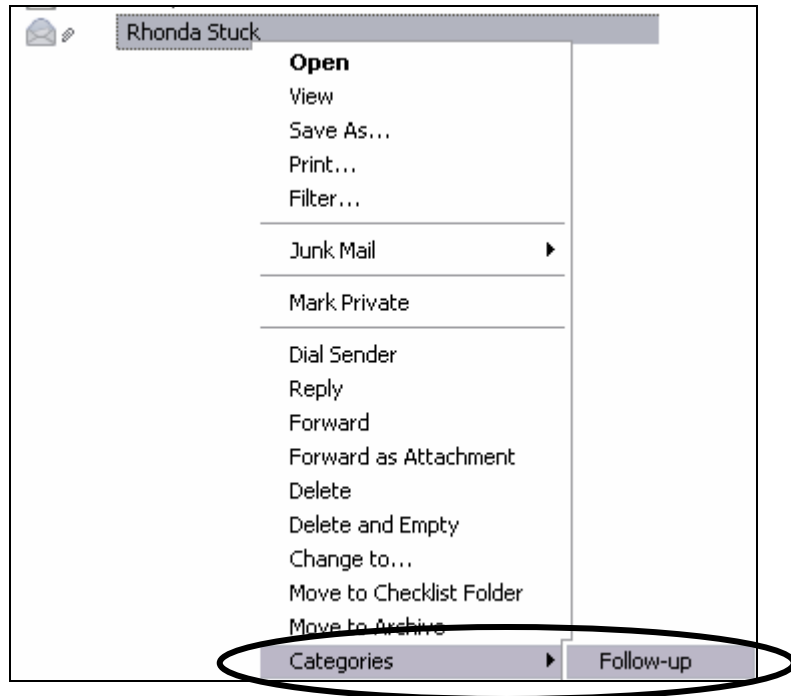


2. Type the name of the new/custom category.
3. **Click "Add"**.
4. You now have a new category that you can assign to your GroupWise items such as a mail message or task.
5. You can edit or remove colors from the categories. You can also delete or rename categories according to your individual needs.



### To assign a category to an item

1. **Right-mouse click** on the item you wish to assign a category to.
2. **Click "Categories"**. Choose your appropriate category.

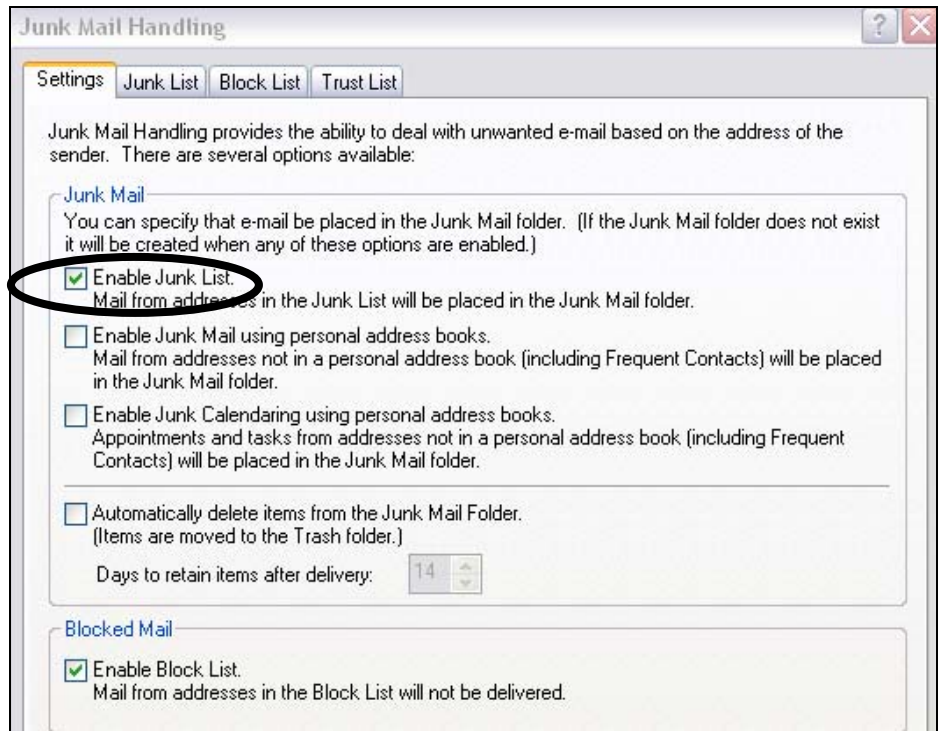


3. The item is now color-coded according to the category selected.

## Junk Mail Handling

Junk Mail handling provides the ability to automatically filter unwanted email as it is received. Messages received from specified email addresses can be moved to the Junk Mail Folder or blocked all together.

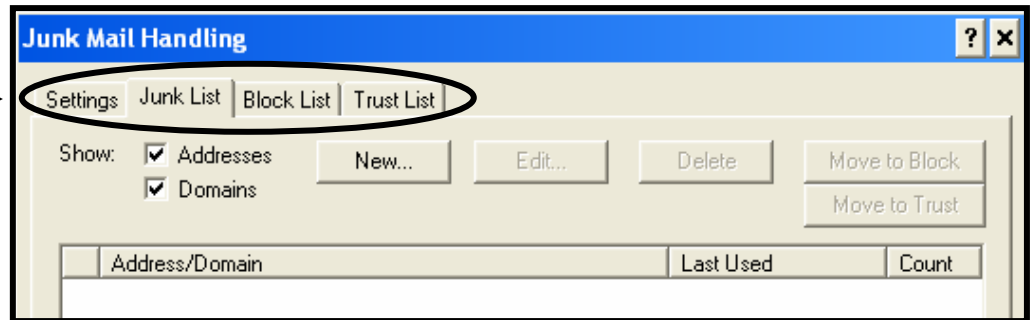
1. **Click on Tools, Junk Mail Handling**



2. **Select the tab, Junk List, or Block List, or Trust List.**

It would be helpful to add the following websites to the **Trust List**:

- [www.lumc.edu](http://www.lumc.edu)
- [www.luhs.org](http://www.luhs.org)
- [www.loyolamedicine.org](http://www.loyolamedicine.org)



3. **Click "New"** and enter the email address you wish to add. **Click "OK"**.
4. You can also **right-mouse click** on an item in your Mailbox and **select Junk Mail, Junk sender** and **Click "OK"** to enter the email address and Junk Mail.

## ADDRESS BOOK AND CONTACT INFORMATION

### OBJECTIVES

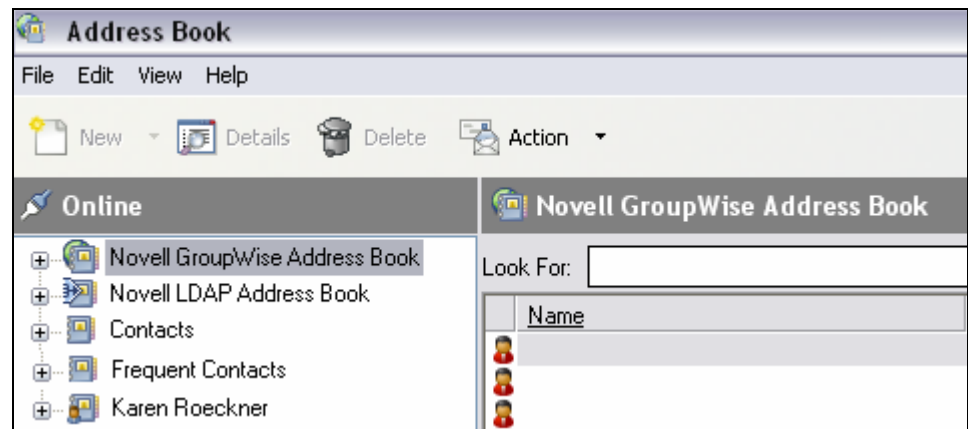
- ❖ How to use the Address Book
- ❖ Addressing an Item
- ❖ Creating and Editing Groups
- ❖ Choosing Resources
- ❖ Creating and Sharing a Personal Address Book
- ❖ Working with Contacts

## ADDRESS BOOK


The address book contains names and addresses, e-mail addresses, phone numbers, and other items. Since the Address Book is an independent application, you can access it from other programs such as Microsoft Word. You can even print envelopes in Word by pulling the contact/address information from GroupWise into Word.

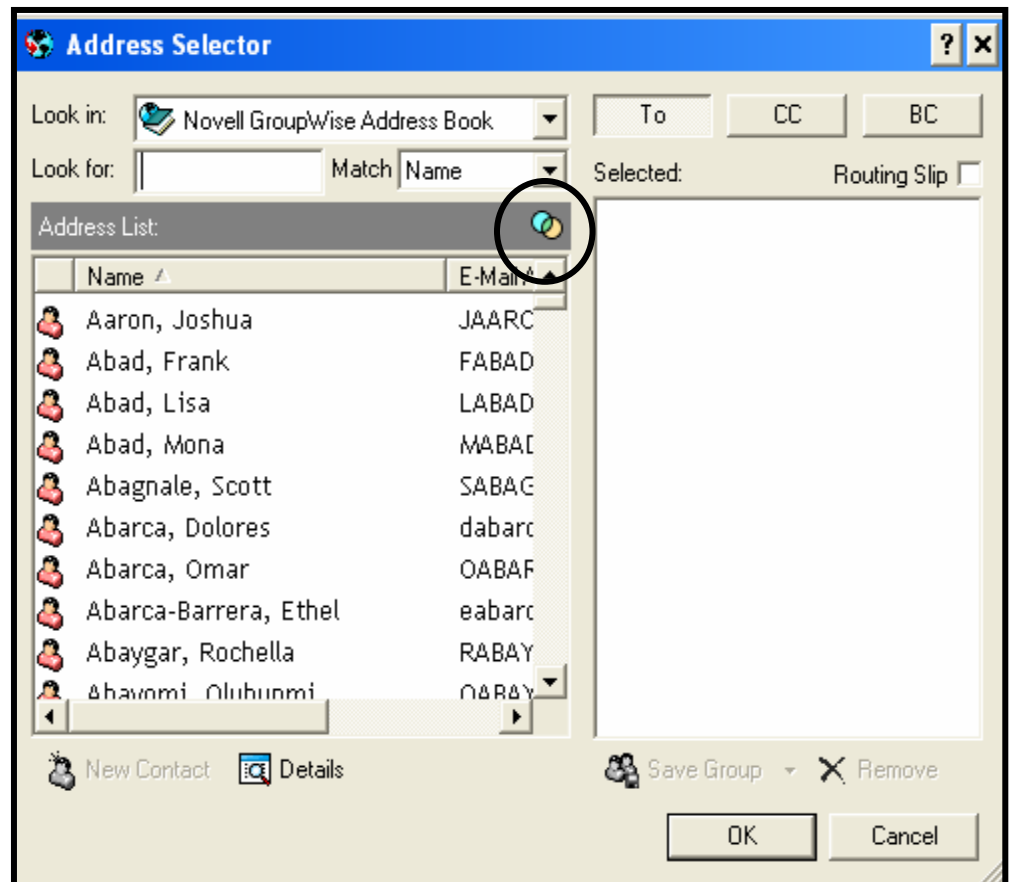
The address book has four different books to find who you are looking for:

1. GroupWise Address Book – this contains all of the GroupWise users and resources in the Loyola system.
2. Frequent Contacts – your most frequently used contacts are stored in this “book”.
3. Personal Address Book – you can create your own personal address book.
4. Novell LDAP Address Book – this “book” uses Internet directory services like “Bigfoot” and others to search for contacts outside of Loyola University.

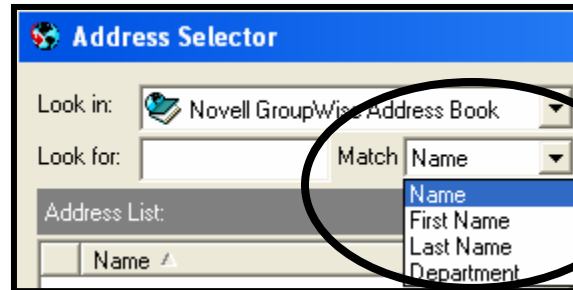


## Addressing an Item

1. Select **File, New**.
2. Select the type of item you would like to send (i.e. mail message).
3. To locate an address (or name), enter the last name in the “**To:**” section and the system will find the name for you. If you have more than one addressee, type in each address, press **Enter** after each one, and continue until all addresses are listed. **Click** in any of the other boxes to deselect the address box when you are completed.
4. Another way to locate a name is to select the **Address Book** that contains the person or people you want to send the item to by clicking the **Address Book** icon on your message window, selecting the book you want to search in from the “**Look in:**” drop-down window. By default, the Novell GroupWise Address Book is visible. To show only Contacts, Groups, or Resources, **click** on the **filter** icon . The Default is to show **All Entries**.



5. You can also change the way GroupWise searches the database. You can “Look for” the person by: Name, First Name, Last Name, or Department by specifying this next to “Match”. **Click** on the drop-down window next to “Match”. Type in what you are looking for.



6. When GroupWise “finds” the person, **double-click** on their name, and **click “OK”** to add them to your message. There are three options to send an item: **“To”**, **CC** (carbon copy), or **BC** (blind copy).
7. You can also **right-click** on a name or group and choose an action (like To, CC, BC, Remove Information).
8. Finish the item by typing in any other information, and **click “Send”**.

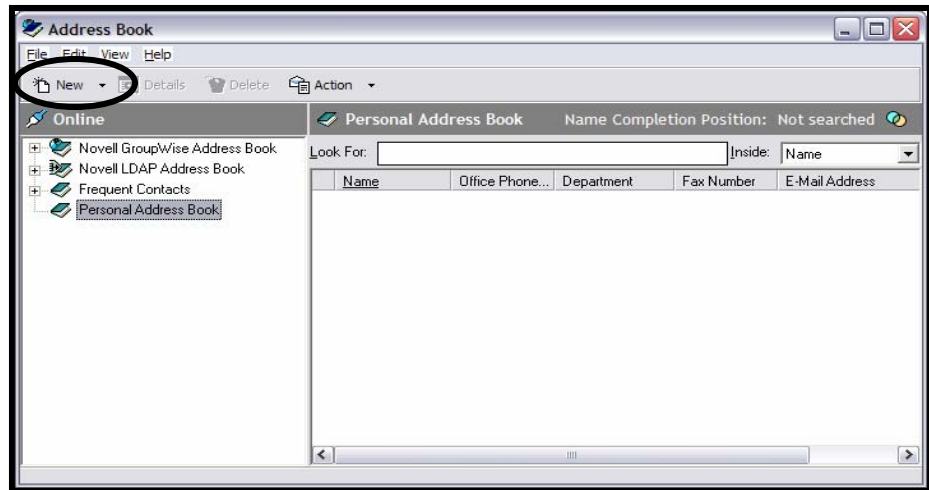
## Groups

Creating groups allow you to address items to multiple users and resources without having to enter their names individually. There are two types of groups available: personal and public. Personal groups are created by you. Public groups are created by system administrators for use by the general public. They may include departments, teams, or other “groups” that would be found at Loyola.

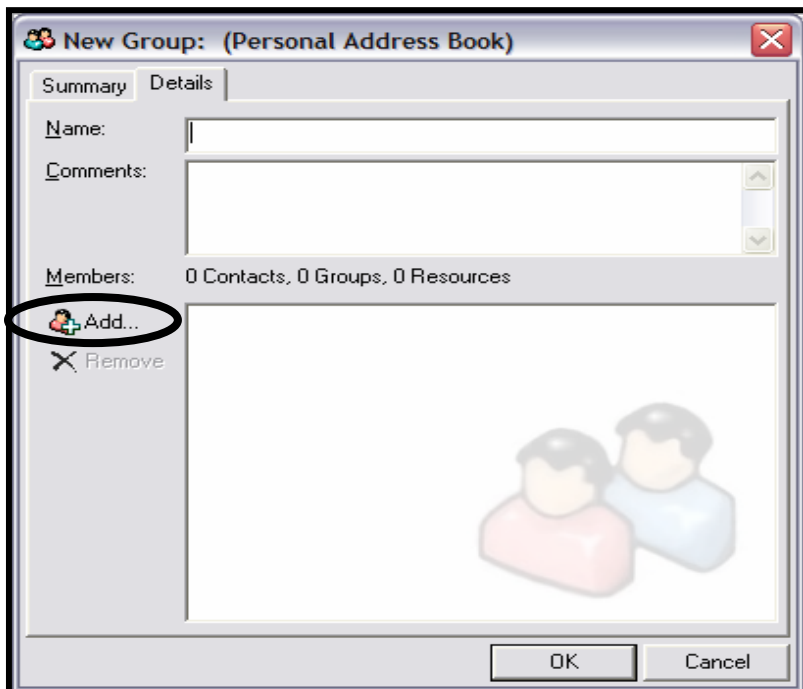
To create a group:

1. **Select** the Address Book icon from the toolbar, or **select Tools, Address Book** from the main window.
2. **Select** the personal address book you want to add the group to.

3. Click the down arrow next to **"New"**. Select **"Group"**.

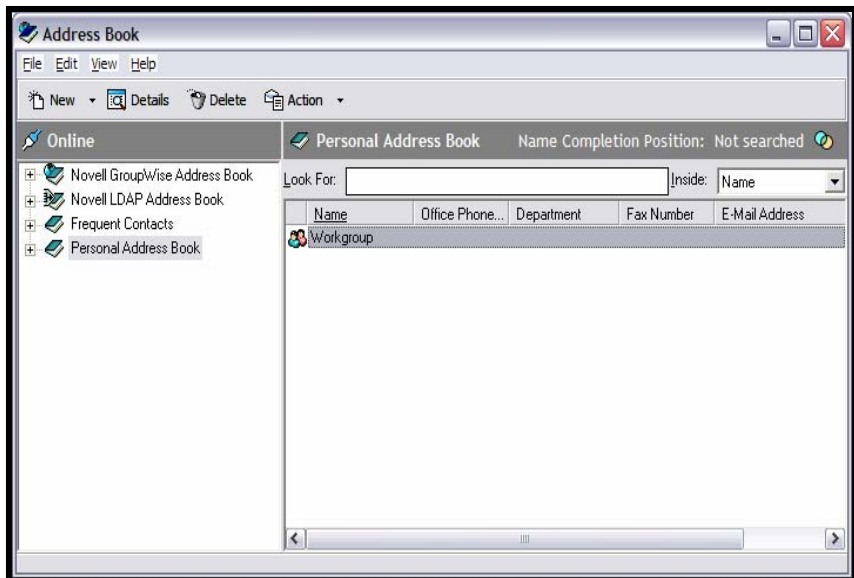


4. Enter a Group Name.
5. Add any comments to the Comments field.
6. Click on the **Add** button under the **Members option** (these are the people you want to add to this group).
7. Click to choose: To, CC, or BC.



8. Double-click the Username(s) and/or Resource(s) you want to add to the group.
9. Click **"OK"**. Click on **"OK"** a second time.

10. Now you will see the new Group listed in the Address Book window.
11. Groups will be displayed with a "Group" icon.
12. You can also send an email message to a Group. **Right-mouse** click on the group name, **select "Action, Send Mail"**. The group name will automatically appear in "To" or CC or BC depending on what you selected for the group.



13. Another way to send a message to a Group is to create a new item (mail message), **click** in the "To" box and **select the Address Book**. **Select** your "group" from the appropriate folder.
14. You can save your Groups in any of the address books, **except the main Novell GroupWise Address Book**.

When you create Groups (in a new item), **Save Group** has a drop-down menu as to which phone book to save your new group to. **Select the Phone Directory** first before saving your group.

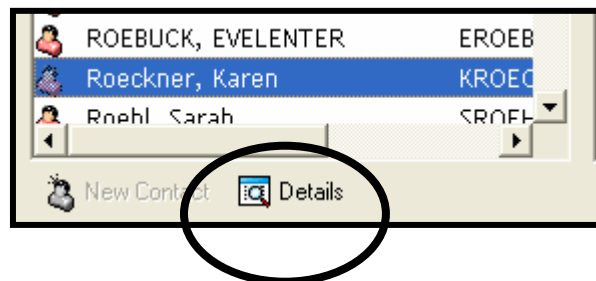


## Editing a Personal Group

1. **Select** the **Address Book** icon from the Main Window toolbar.
2. **Right-click** the **group** you want to edit.
3. **Select Details.**
4. **Click** on **Add** or **Remove** depending upon what you want to do.
5. To add a user or resource, **click** on **Add**, type in the name or select it from the list and **double-click** the name to add it to your group. Make sure you have selected **To, CC or BC**. Click **OK**.
6. To remove a user or resource, **click** on the name you wish to delete/remove from the list and **click "Remove"**.
7. To finish, **select "OK"**.

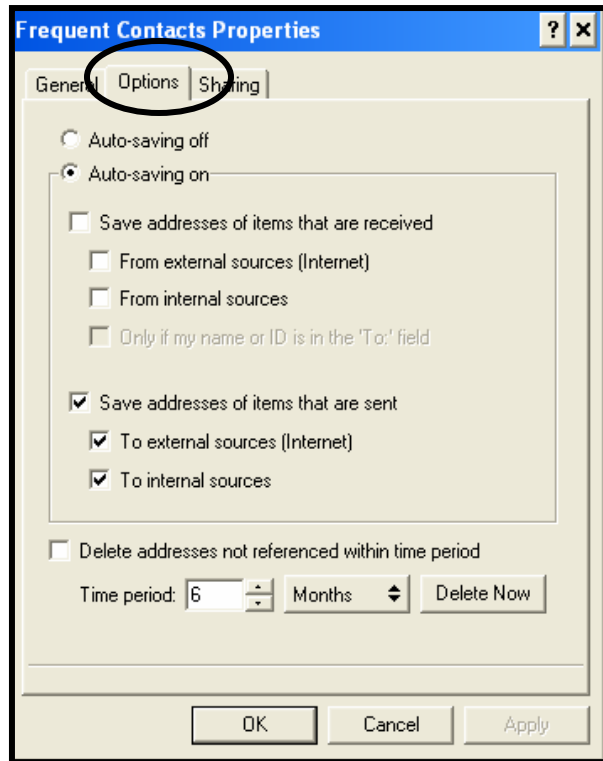
## User Details

You can also **select** a user and then **click** on **Details** to see more information on a user.



## Customizing Your Frequent Contacts Address Book

1. Click on **Address Book** from the main GroupWise menu.
2. Click on **Frequent Contacts**.
3. Right click on **Frequent Contacts** and click on **Properties**.
4. Click on the **Options** tab.



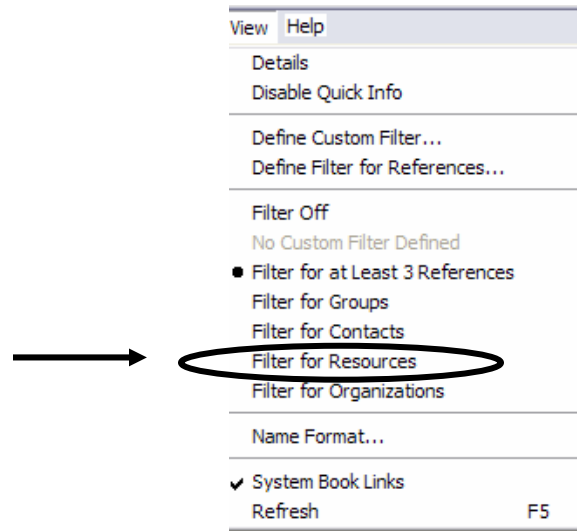
5. Specify your desired settings and click **“OK”**.

## Choosing Resources from the Address Book

Resources are located under View in the Address Book.

1. Click on **Address Book** while in a message or from the main menu.
2. Click on **View**. There are four filters: Groups, Contacts, Resources, and Organizations.

3. Click on **Filter for Resources**.



4. Click on your **Resource** to select it.

5. Select the pop-down arrow next to **Action** and choose the item you wish to complete; or **right-mouse click** and choose **Action**.

6. The Resource will be inserted into the **To:** window dialog box.

7. Complete the remainder of the item and **click** on **Send**.

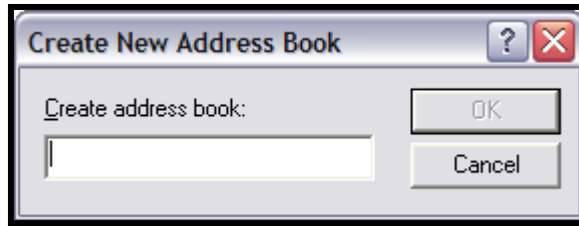
### Creating and Sharing a Personal Address Book

You can share your personal address books with other users. You can send an address book consisting of the members of a work group to other members of your staff. You first have to create an address book.

You cannot modify entries in system address books. However, you can copy system books to personal address books and then modify the entries in the personal book.

## Creating a New Address Book

1. Open the Address Book and select **File, New Book**.



2. Enter the name for the new book and **click OK**.
3. Add names one at a time, or import names.

## Import addresses into a Personal Address Book

1. **Right-click** the attachment (personal address book).
2. **Select "Save As"**.
3. **Select** the folder or disk you want to save the address book into.
4. **Select "Save"**. Novell address book files have a .NAB extension.
5. **Open** the Address Book where you want the file saved.
6. **Click on File, Import**.
7. **Select** the address book file. **Click "Open"**.

## Export addresses into a Personal Address Book

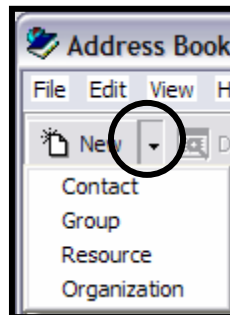
1. **Choose** the address book you want to export names from.
2. **Select** the addresses you want to export.
3. **Click on File, Export**.
4. **Select** the **entire address book** or **selected items**, depending upon what you wish to do.
5. **Enter** a filename for the exported file.
6. Specify a folder for the file to be saved in.
7. **Click "OK"**.

## Copy Names between Address Books

1. **Open** the appropriate Address Book.
2. **Select** the user name.
3. **Right-click** and choose **Copy To** (or you can click and drag names from system address books to personal address books).
4. **Select** the **Address Book** you want to add the name to.
5. **Select** "OK".

## Add Names in an Address Book

1. To add names to the new address book, **click the down arrow** next to the "New" button.
2. Choose the entry type: Contact, Group, Resource, or Organization. Enter the appropriate information for the new entry.



3. Complete the fields for the entry.
4. **Click** "OK".

## Change Name Information in a Personal Address Book

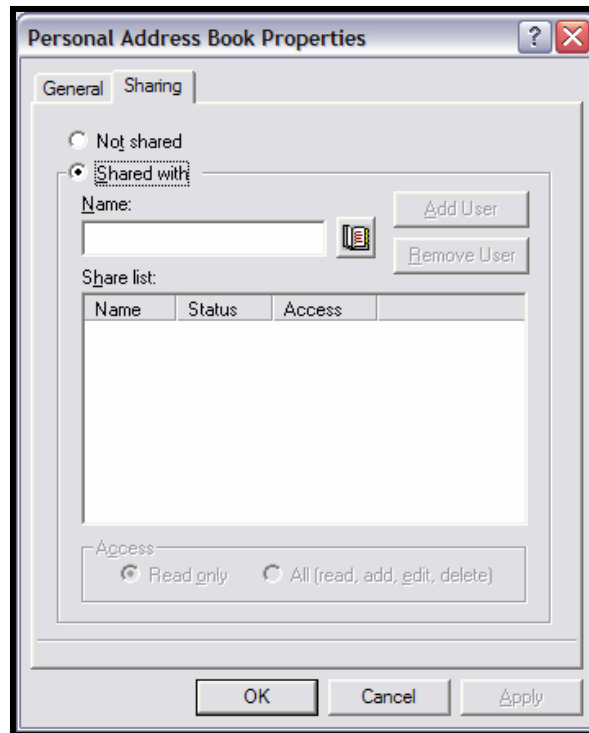
1. **Double-click** the user name while an Address Book is open.
2. Make any necessary changes in the dialog window.

The screenshot shows a dialog window titled "-post, Student (Personal Address Book)". The window has several tabs: Summary, Contact, Office, Personal, Comments, Advanced, and Certificate. The "Personal" tab is selected. The "Name" section includes fields for First (Student 1), Middle, Last (-post), Prefix, Suffix, and Display (-post, Student 1). The "Email Address" section has a list with one entry "Stu-Post.SHRL1.LUC1" checked, and buttons for Add, Remove, and Edit. The "Instant Messaging" section has a dropdown and buttons for Add, Remove, and Edit. The "Phone" section has radio buttons for Office, Home, Mobile, Fax, and Pager, each with an adjacent text field. At the bottom right, the "OK" button is circled in black.

3. **Select "OK"**.

## Sharing a Personal Address Book

1. Click on the **Address Book** icon, or click on **Tools, Address Book**.
2. Click the tab of the address book you want to share. If the tab is not visible, the book is not open.
3. Click **"File, Sharing"**. Click on the button **"Shared with"**. You can also **right-click** on the name of the address book and click **"Sharing"**.

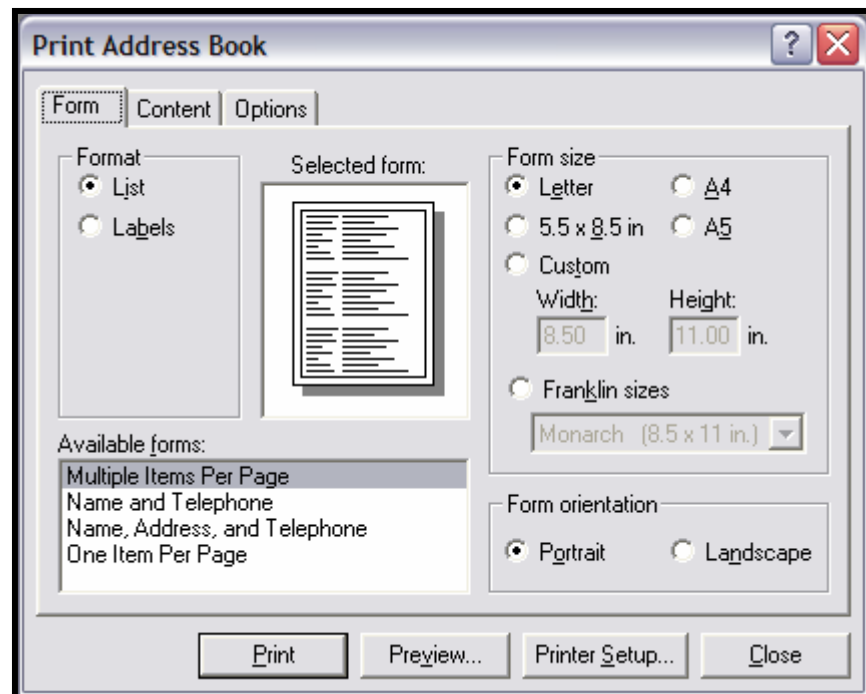


4. Enter the name of the person with whom you want to share the address book and then click on **Add User** (You can search for names).
5. Click each user's name in the **Share List** and assign him or her **access** rights (Read only, All).
6. Click **OK** to save your changes and close the box.
7. Once you click **"OK"** or **"Apply"**, the person with whom you want to share the address book receives a notification. They can either accept or decline your "offer" of the shared address book(s). If they accept your invitation, a new tab will come up in their address book with the owner's name in parentheses. You cannot share address books across external domains.

## Printing in the Address Book

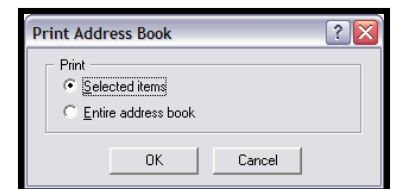
You can print the following items from the address book:

1. Selected records
2. A list of records
3. The entire address book
4. Labels



### To Print from the Address Book:

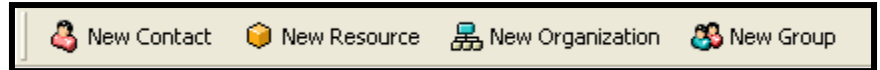
1. **Click on File, Print. Choose “Selected items”, or “Entire address book”. Select “OK”. Select the various options to print under the Form tab.**
2. **Select the Content tab and choose the appropriate options.**
3. **Select the Options tab and choose the appropriate options.**
4. **Click on Preview to make sure everything looks satisfactory.**
5. **Click “Print”.**
6. **Click Close.**



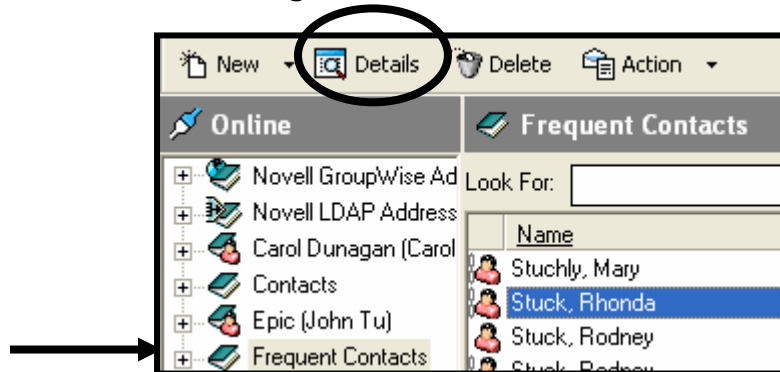
## CONTACTS

GroupWise makes it easy to record the personal information of your contacts as well as track your communications with them.

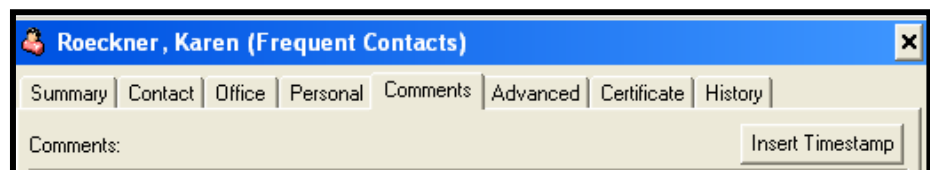
1. **Click on the Contacts Folder.**
2. You can create a new contact, resource, organization, and group by clicking on the appropriate icon.



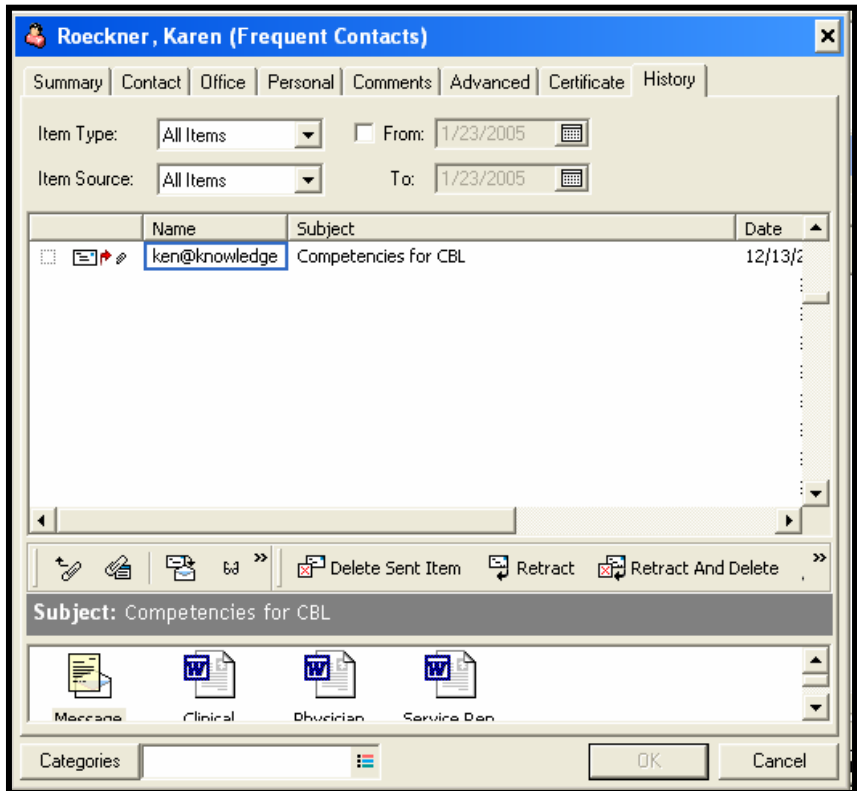
3. Next, enter information regarding the new contact in the appropriate fields.
4. You can also see the details of any contact you create by **double clicking** on your newly created contact; or by **clicking on Address Book, selecting a contact, and click on Details**; or, by **right-clicking on a contact, selecting "Details"**.



5. The comments section allows you to add a timestamp along with your any comments regarding communication with this contact. **Click "Insert Timestamp"** to add the current date and time to this contact.

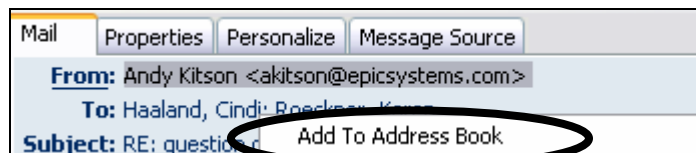


- The History tab shows all the items that have come from or have been sent to this contact. You can change the following: items to display, dates to display; and, use the toolbar options listed on the bottom of this screen shot.



## Adding New Contacts

You can also **right-click an addressee** in an item and add him/her to any personal address book including your Frequent Contacts address book.



# MANAGING YOUR MAILBOX AND FOLDERS

## OBJECTIVES

- ❖ Using Folders to Organize Your Mail
- ❖ Creating Folders
- ❖ Discussion Threads
- ❖ Moving and Deleting Folders/Items
- ❖ Using Checklist View
- ❖ Archiving Mail

## MANAGING YOUR MAILBOX AND FOLDERS

There are many options available in GroupWise to organize your mailbox and folders. We will discuss some of these options in this module.

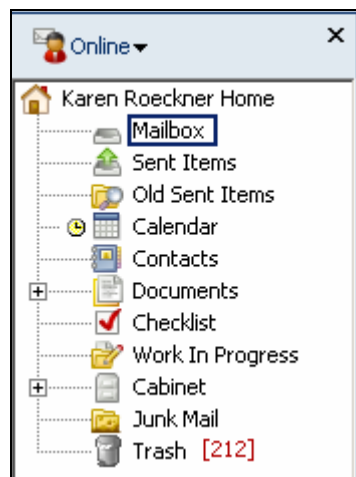
### Using Folders to Organize Your Mail

Consider organizing your mail in one of the following styles:

- Create folders for mail from managers and colleagues.
- Create folders for mail regarding business correspondences (business folder).
- Create folders for mail for social contacts (personal folder)
- Create folders for mail regarding each office project you are currently working on.
- Create folders for mail regarding current projects and completed assignments.
- Create your own folder system. Fashion it like a file cabinet.

### Opening and closing folders

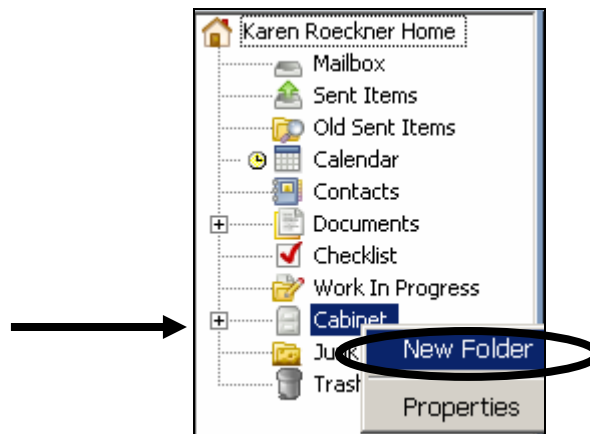
- A plus (+) symbol indicates that a root folder is closed. To view any sub-folders inside the root folder, click on the plus (+) button.
- A minus (-) symbol indicates a root folder is open. To close the sub-folders, click on the minus (-) button.



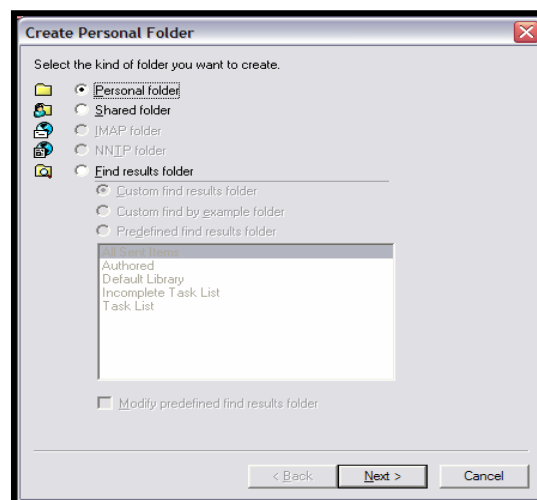
## Creating Folders

To create a folder in GroupWise:

1. **Click on Cabinet.**
2. To create a sub-folder, **click on Cabinet**, and then **click** on a folder already inside the Cabinet.
3. **Click on File, New, Folder;** or **right-click on Cabinet** (folder), and **choose New Folder**



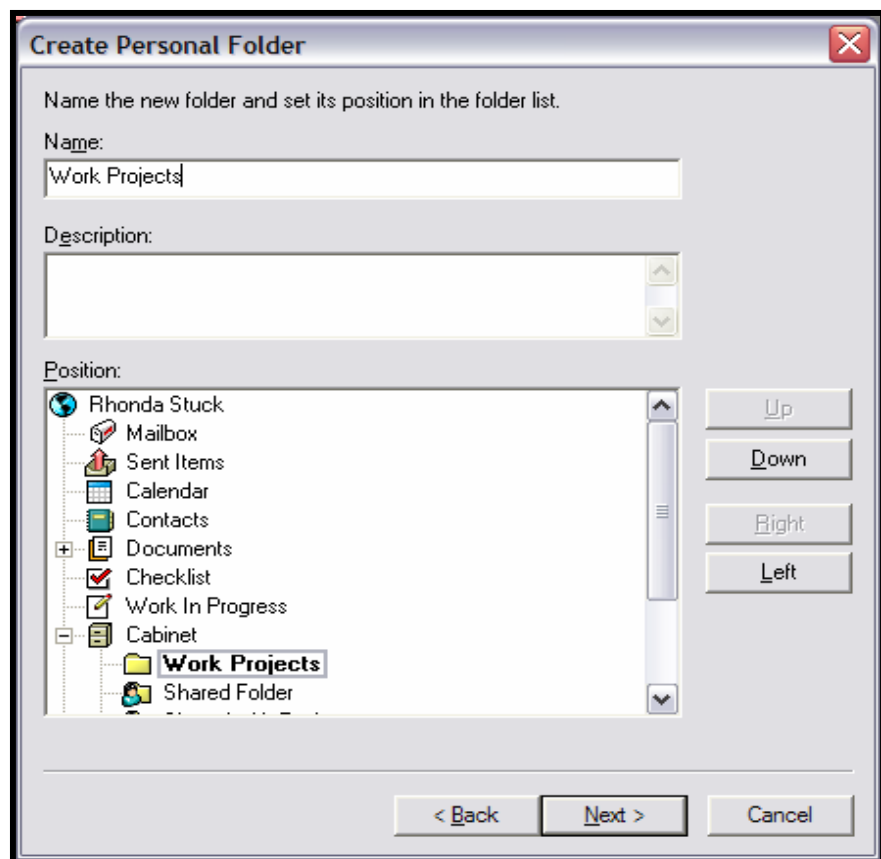
4. **Select** the kind of folder you want to create (see choices below). To create a personal folder, **click on Next**. To create a shared folder, **click** the button next to Shared Folder, **click on Next**.



**Types of folders:**

- **Personal folder** – Personal items
- **Shared** – share items with others on the GroupWise system
- **Find Results** – searches using certain criteria and adds items according to the search each time the folder is open.

5. Type in a name and description for your folder.



6. **Click “Next”.**

7. If creating a shared folder locate the addressee(s) for the shared folder and provide them access (see specific instructions in next section).

8. Define the Settings for this folder. **Click “Finish”.**

## Creating a Shared Folder

1. **Click on File, New, Folder.**
2. **Select “Shared folder”. Click “Next”.**
3. **Name** the folder.
4. Use the “Up, Down, Left, Right” buttons to put the folders in their appropriate place.
5. **Click on Next.**
6. Add the usernames in the **Name** field for those people you want to share the folder with. **Click “OK”.**
7. **Click** on each username (under **Share list:** and give them “user rights” such as **Add, Edit,** and/or **Delete.**
8. **Click on Next.** Define settings for the share folder.
9. **Click on Finish.**
10. **Select “OK”** (you can also change the subject or add a message if you want).

GroupWise subsequently sends a message to the new “shared” users. This message notifies them that they are now a part of the shared folder. There will be a special **Shared Folder** icon next to the message indicating it is a shared folder message.

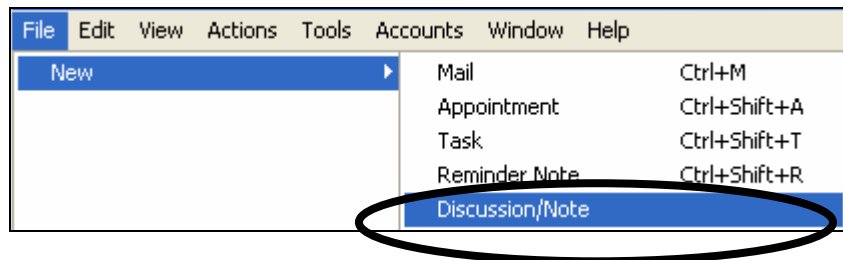
You can also share a folder that already exists. To do this, select a folder you want to share and **click on File, Sharing, Share with.** Repeat steps 6-10 above on creating a Shared Folder.

## Accepting a Shared Folder

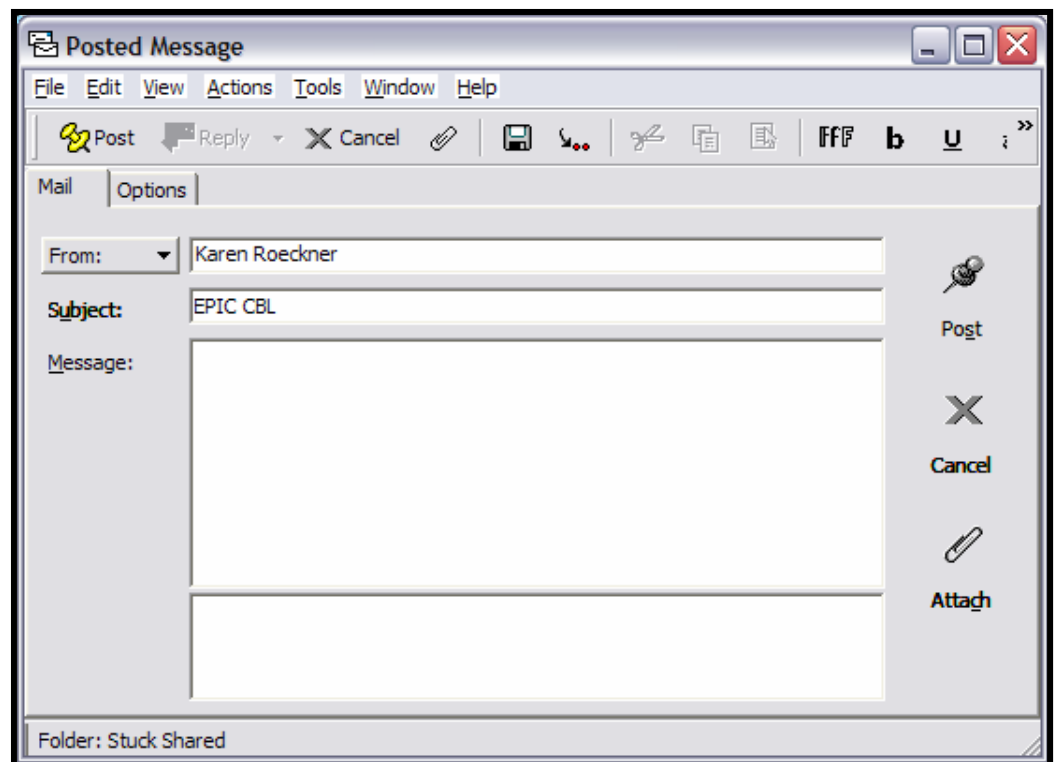
1. **Double-click** on the notification icon (message) for the shared folder.
2. **Click on Next.**
3. There is an option to change the folder name, add a description, and move the folder to another location.
4. **Click “Finish”.**

## Discussion Threads – Posting Items to a Shared Folder

1. A discussion item can be created for others to share by creating a newly shared folder and listing users to share the folder. This folder will be instantly seen as a new discussion item.
2. **Create** or **open** a Shared Folder. List the users with which to share this folder.
3. **Select “File, New Discussion”**.




4. **Enter a Subject** for the discussion.



5. **Enter text** in the message field and **click “Post”**.

- All individuals who have access to this shared folder will instantly see the new discussion item as an incoming message.

Mailbox		
	From	Subject
	Karen Roeckner	EPIC CBL

## Displaying and Replying to a Discussion Thread

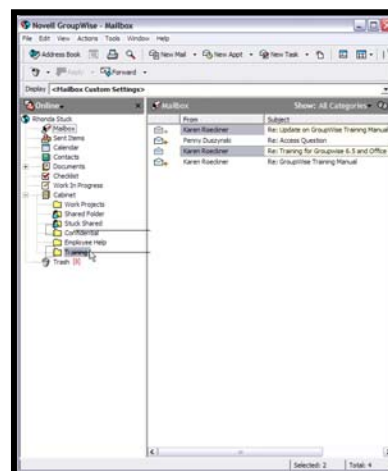
- Choose a shared folder.
- Click on **View, Display Settings, Discussion Threads**.

## Moving an Item into a Folder

- Click on **Mailbox** in the main window.
- Click on the item you want to move, then **drag** and **drop** it into the folder or subfolder.

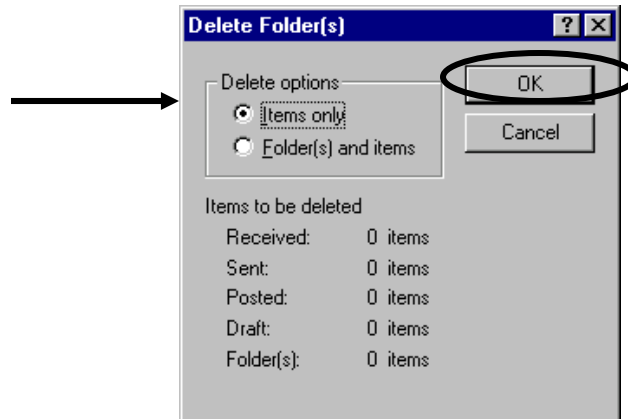
## Moving Multiple Items into a Folder

- Click on **Mailbox** in the main window.
- Hold down the **Ctrl** key and click on the items you want to move.
- Drag and drop the items into the folder or subfolder.



## Deleting a Folder/Folder Items

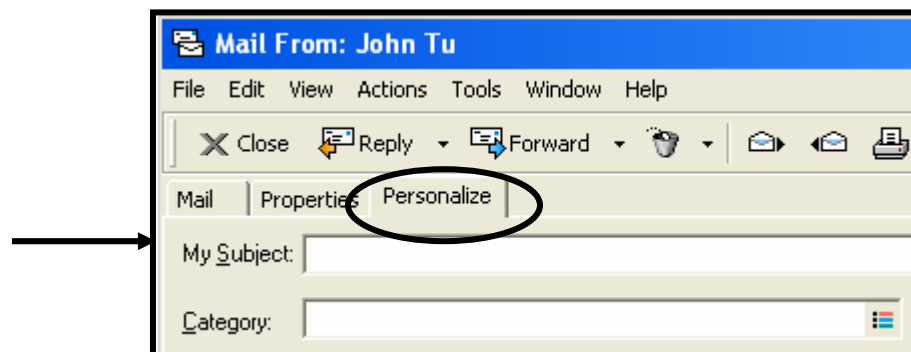
1. **Right-click** on the Folder in the cabinet and **click** on **Delete**.
2. You can delete all the items inside the folder (Items Only), or delete the folder and the items inside (folder(s) and items). **Click "OK"**.



## Customized Subject Line

Customize the subject line of a received item so that messages can be accurately identified and filed into the appropriate folders.

1. **Open** a message of a **Received** item.
2. **Click** on the **Personalize** tab.
3. **Enter** your new subject in the **My Subject:** field.
4. You can also assign the message to a category.



5. **Click "Close"**.

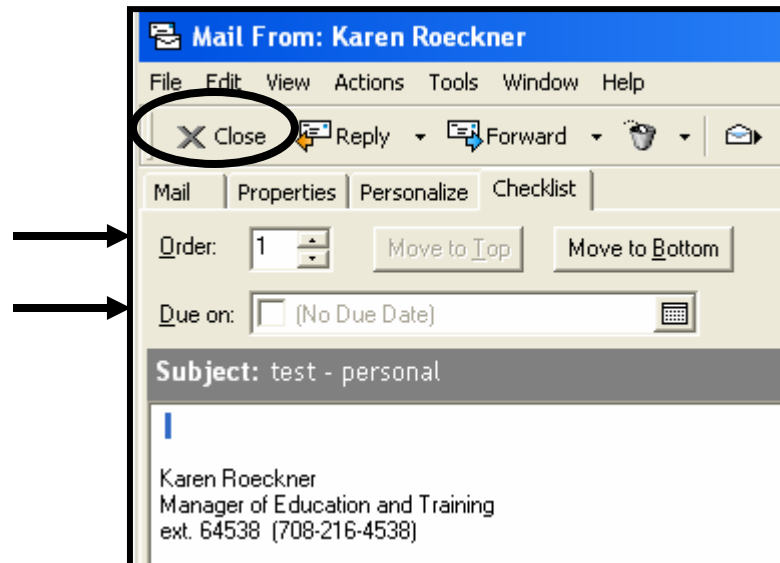
## Using Checklist View

Checklist view lets you mark and organize items in your mailbox that require follow-up. You can drag-and-drop items to place them in Order of priority, assign a Due date, and mark items as complete into your Checklist Folder.

1. **Select** the “**View By**” icon and **click** “**as Checklist**”.

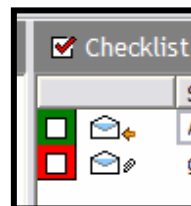


2. **Drag and drop** items requiring follow-up to the top of your Mailbox.
3. **Open** the item
4. Specify the Order priority and Due on date.
5. **Click** “**Close**”.



## Using the Checklist Folder

This folder allows you to create a master list. You can move any type of GroupWise item into the Checklist folder. Items that are due today are color coded in green; items that are overdue are color coded in red.

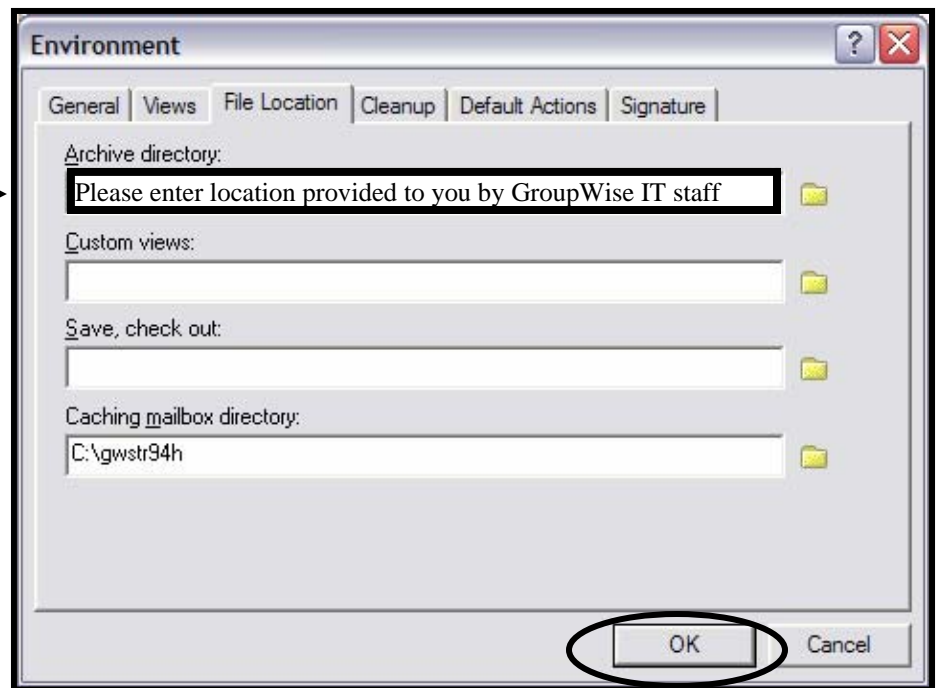


## Archiving Mail

Archiving is a way to conserve space on the network e-mail server by moving items from the mail server to your hard drive or a diskette.

To archive an item, you will need to set an archive path so the mail is stored on your hard drive (C:\) or a network drive (will need network location and then map a drive).

1. **Click on Tools, Options. Double-click on Environment.**
2. **Click on the File Location tab.**
3. **Enter the correct drive letter and folder name. Click "OK".**



4. **Select one of the items you wish to archive, click on Actions, Move to Archive; or, right-mouse click on the item and choose Move to Archive.**

### To Open Archives

1. **Click on File, Open Archive.** The archive is open when there is a check by the title, **Open Archive**, in the main menu bar. Your regular mail appears when there is no check mark next to the title, **Open Archive**.
2. **Click on File, Open Archive** (deselect the check mark next to "**Open Archive**") to close archives.

## **SCHEDULING APPOINTMENTS AND USING THE CALENDAR**

### OBJECTIVES

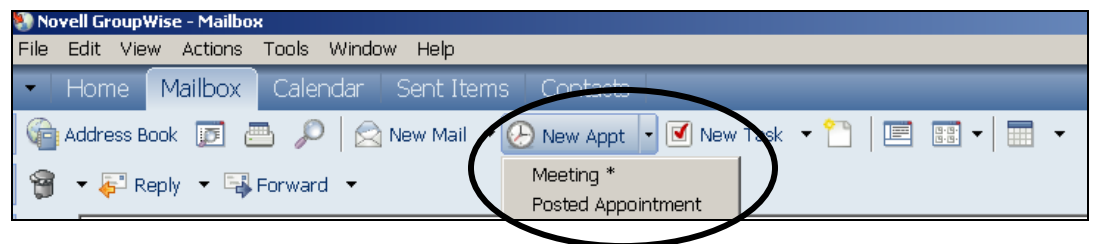
- ❖ Appointments
- ❖ Scheduling a Meeting
- ❖ Posting an Appointment
- ❖ Using a Busy Search
- ❖ Using AutoDate
- ❖ Accepting and Declining Appointments
- ❖ Working with Tasks
- ❖ Using the Calendar
- ❖ Creating a New Calendar
- ❖ Changing the Calendar colors
- ❖ Multi-User Calendar
- ❖ Setting Proxy Rights
- ❖ Printing a Calendar Item

## APPOINTMENTS

Use the Appointment feature to:

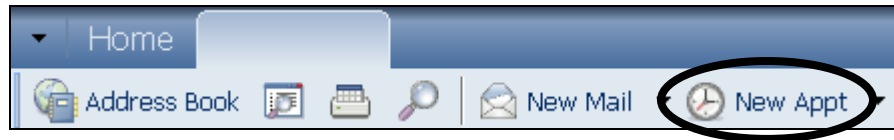
1. Schedule appointments with other GroupWise users
2. Schedule posted appointments in your own calendar for personal use
3. Check other users' schedules for available times by using Busy search

Any appointment you send is placed in your Sent Items folder and that date on your GroupWise calendar is also highlighted. Check the appointment item in Sent Items to see if recipients have declined or accepted.

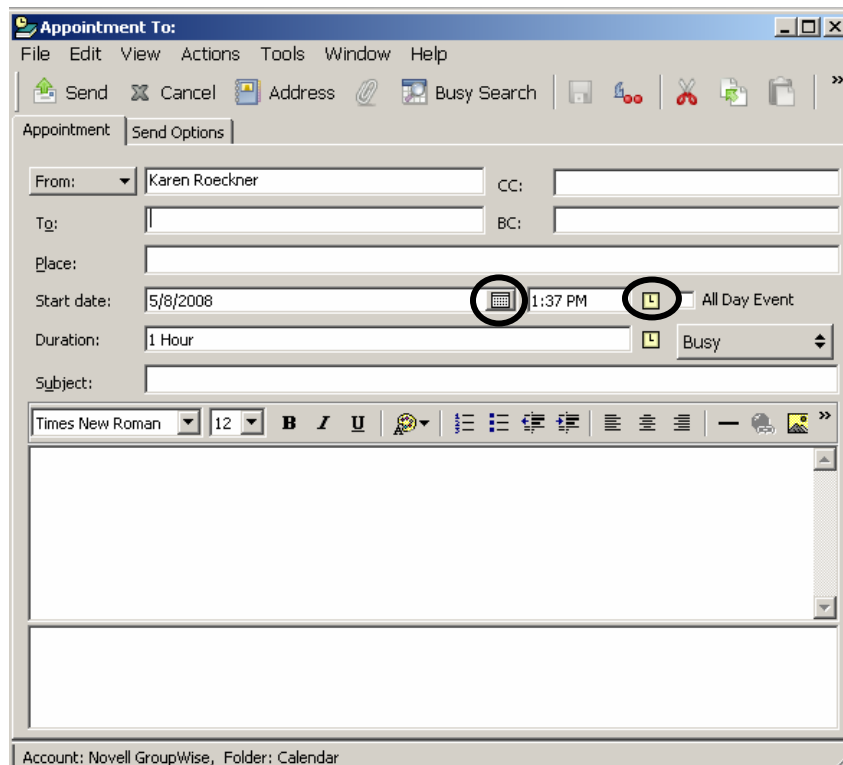


## Scheduling a Meeting (New Appointment)

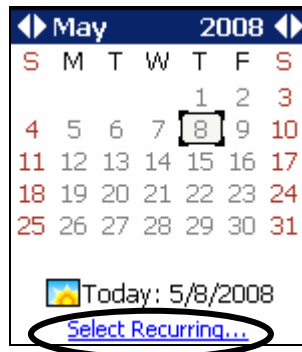
1. On the toolbar, **click** on the **New Appointment** button.



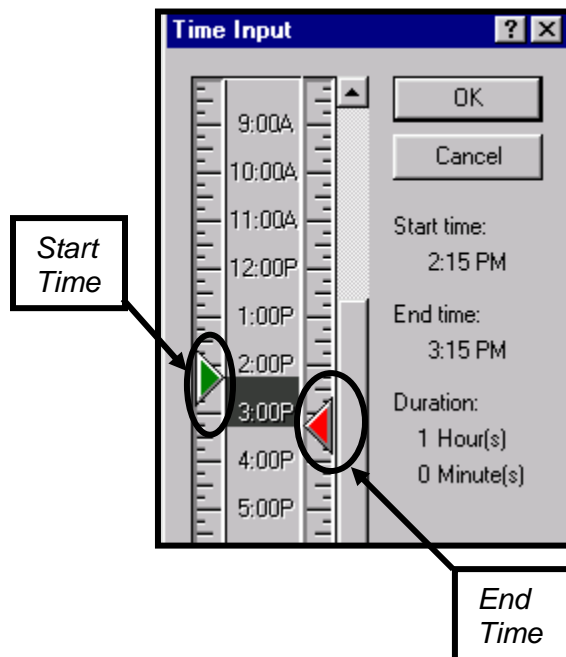
2. **The Appointment To:** dialog box appears.
3. **Enter the recipients** in the To:, CC:, and BC: fields or click on the Address button to obtain addresses from the address book.
4. **Enter information** in the **Place** and **Subject** fields.
5. **Click on the mini-calendar to the right of the Start Date field** to set the date. You can also select an "All Day Event".



6. The current month box appears. The default is set to today's date. **Click** on another date besides today's date to set a date different than today. **Click on the arrows on the left of the month** to change the month, or **click on the arrows at the right of the year** to change the year. **Click on Select Recurring** to give you more options to set recurring dates and other types of date "formulas".



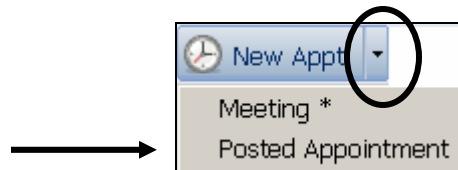
7. **Click on the mini-clock (to the right of time) to set the time. The Time Input box appears. Click on the green arrow and move it to the desired start time, and click on the red arrow and move it to the desired end time and click “OK”.**



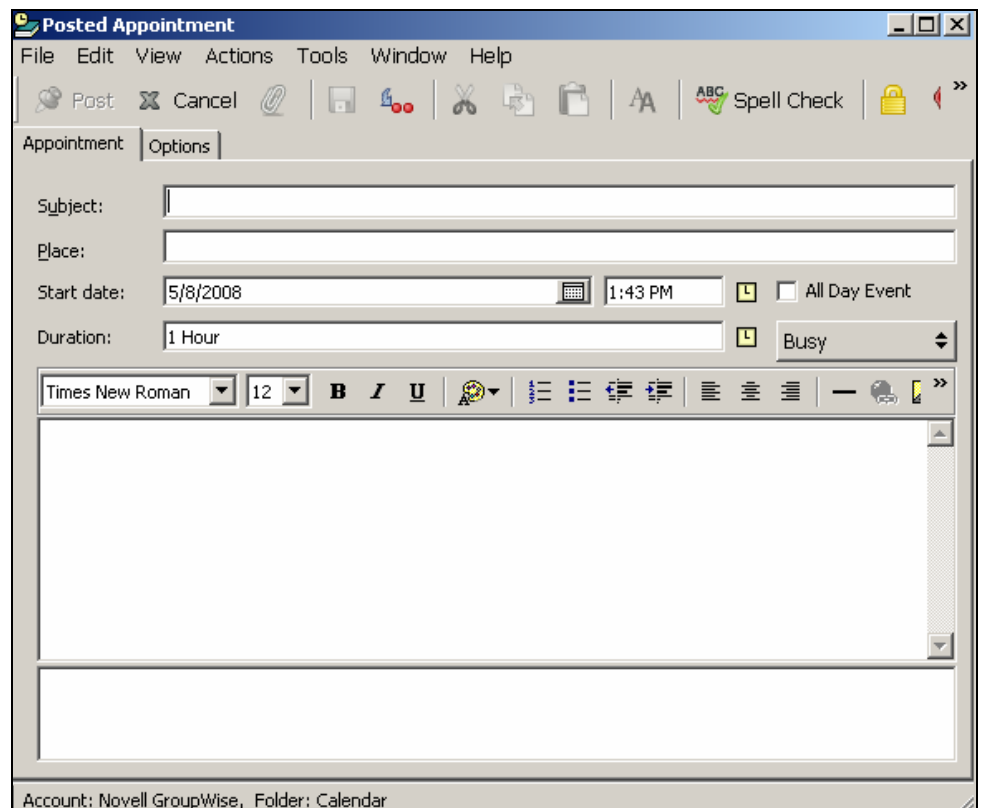
## Posting an Appointment

Posted appointments are automatically posted to your Calendar only. They are a reminder for you only. If you want to schedule a meeting, see the "Scheduling a Meeting" section.

1. On the toolbar, **click on the down arrow of the New Appointment button. Click on Posted Appointment.**



2. The Posted Appointment dialog box appears. (Notice you do not select addressees.)

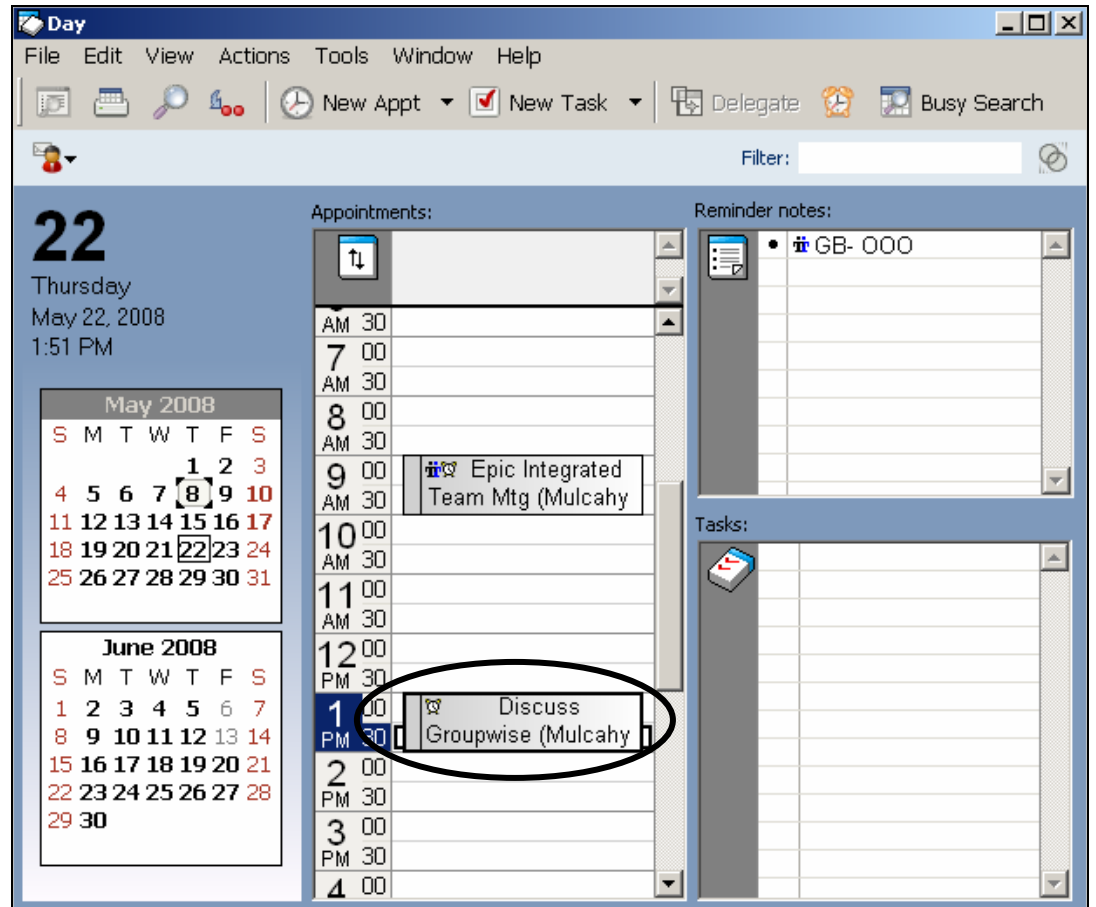


3. **Enter information in the Subject and Place fields.**
4. **Click on the mini-calendar to the right of the Start Date field to set the date, and click on the mini-clock to the right of the time field to set the time.** (See Schedule a Meeting for further instructions).

This is what a posted appointment looks like once it is scheduled on your calendar using the view mode of day ...

It will show you:

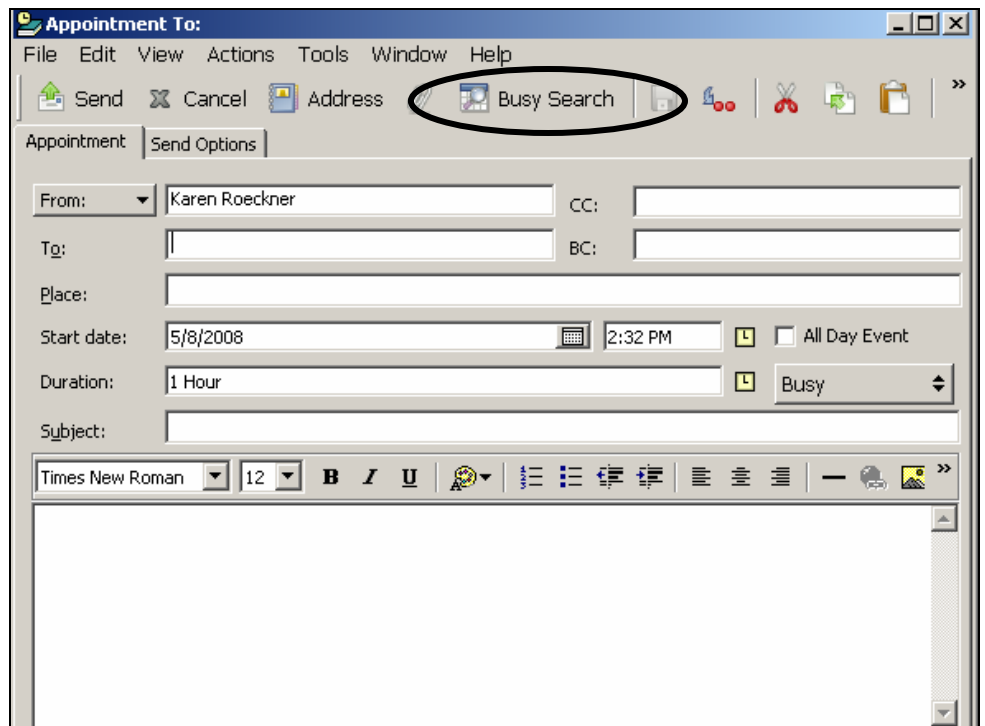
- Today's date
- Your appointments for the day
- A mini description of your appointments.



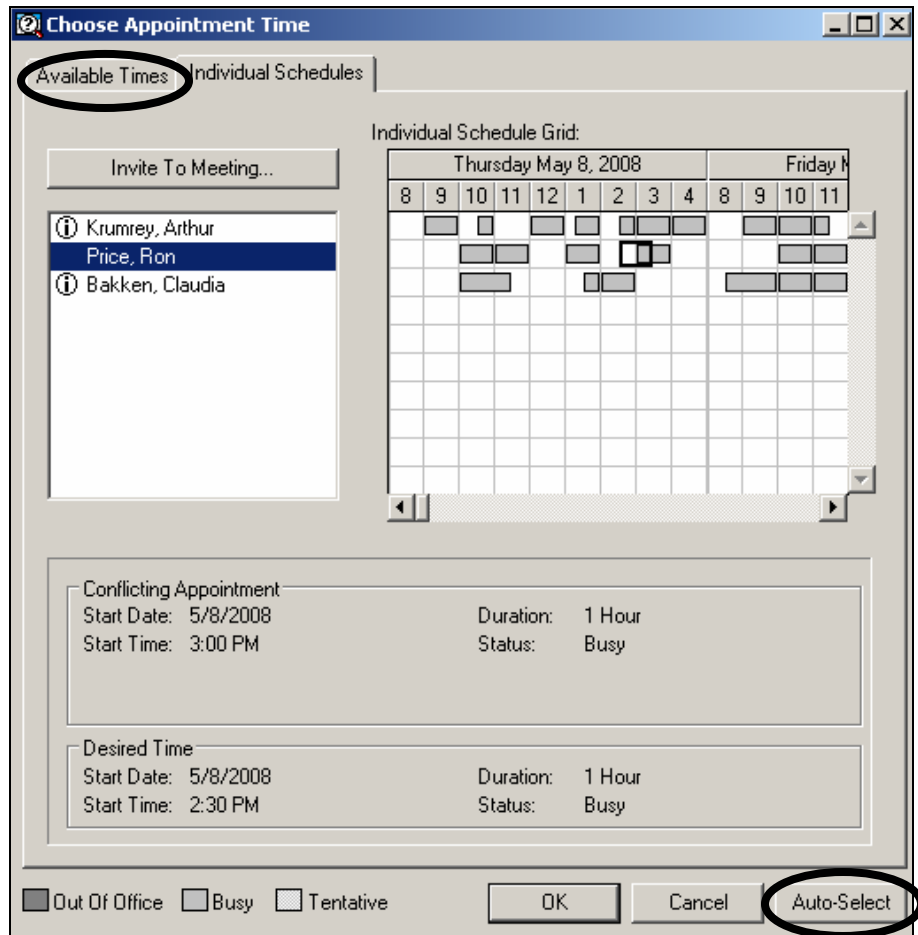
## Using a Busy Search

Use this feature to access the calendars of everyone in the Loyola Address Book. Be aware that some people DO NOT USE THEIR GROUPWISE CALENDARS; therefore, the Busy Search WILL SHOW YOUR ADDRESSEE IS NOT BUSY. In other words, the user's calendar will be open at all available times if they do not use their calendar.

1. On the toolbar, **click** on the **New Appointment** button.
2. The **Appointment To:** dialog box appears.
3. **Enter** the **recipients** in the TO:, CC:, and BC: fields or **click** on the **Address** button to obtain addresses from the address book.
4. **Enter information in the Place and Subject fields.**
5. **Click on the mini-calendar to the left of the Start Date field to set the date, and click on the mini-clock to set the time.**
6. **Click on the “Busy Search” button to determine the availability of a person(s) or resource(s).**



7. **Click on the Individual Schedules** tab to determine available times. Shaded areas mean the user is busy.



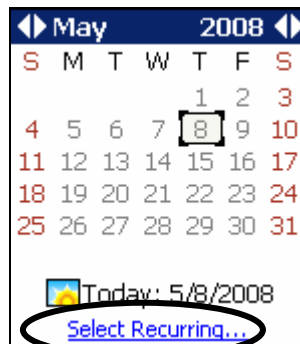
8. **Click on the tab "Available times"** to see more information for each addressee.
9. **Click on the "Auto Select"** tab to have GroupWise automatically find the first date and time when everyone is available for the meeting.

## Auto-Date (Scheduling Reoccurring Appointments)

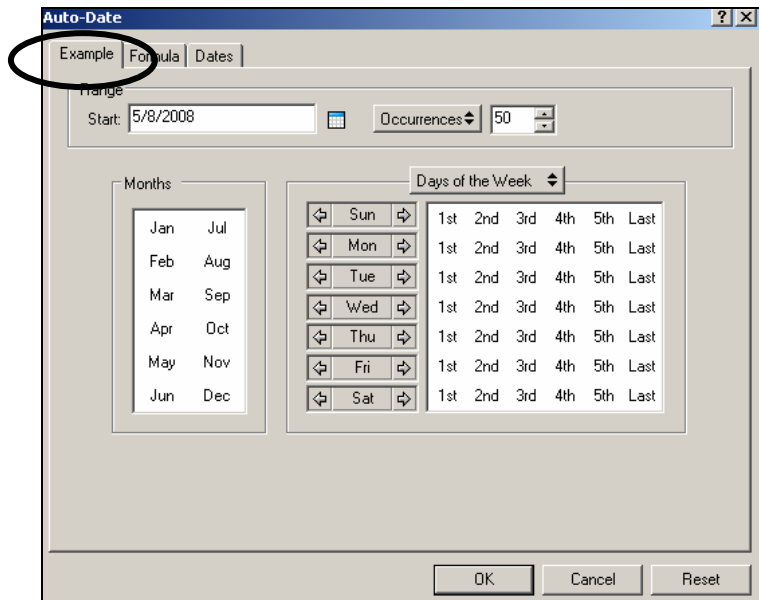
When you need to set up appointments that occur once every month or once every week, you can use the Auto-Date Feature.

This feature will allow you to select the start date, the end date, the months, and the days of the week.

1. On the toolbar, **click on the New Appointment button. Complete the form** and **click on the calendar icon** next to the Start Date field.
2. **Click on Select Recurring....**



3. **Click on the Example tab and complete the form.** You will need to **choose a Start Date, End Date, the months you will meet, and the days of the week.** Click "OK".

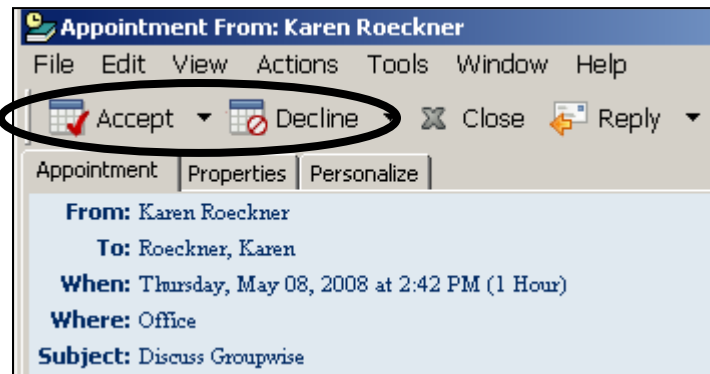


## Accepting and Declining Appointments

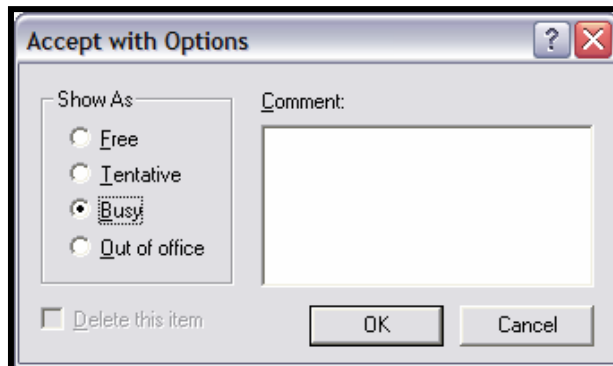
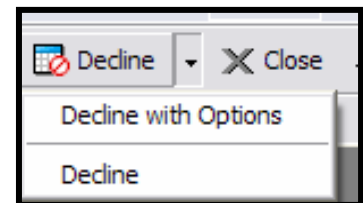
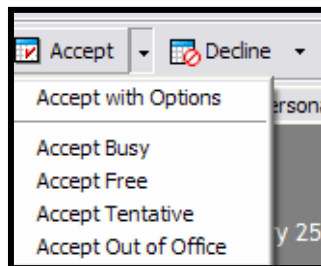
1. **Double-click** on the **appointment** in your Mailbox.



2. The Appointment form dialog box appears.
3. **Click on Accept or Decline**



4. You will now have the option of how to show this appointment as well as enter a comment. **Click "OK"**.



When two appointments overlap, you can move them to a new time slot or decline the appointment.

## Checking the Status of Appointment Items

Any items you send appear in the Sent Items folder. Items appear in chronological order; the last message you sent appears at the top (or you can change the sort order by right-clicking on the "To" bar, and select Sort ascending or Sort descending).

To check whether your message has been delivered, opened, accepted, or declined by the recipient, you will need to look at the Properties screen. This screen will provide complete information about the mail sent from your mailbox.

To check if an appointment has been delivered, opened, accepted, or declined:

1. **Click on the Sent Items folder. Click on the appointment** you wish to check. **Click on Property** on the main toolbar.



2. The Properties/Information screen appears. Check the screen to see if your message has been delivered and if the recipient(s) of the message have opened it. This screen will give you a detailed list of everything that is associated with this item.

Appointment From: Karen Roeckner

File Edit View Actions Tools Window Help

Accept Decline Close Reply

Appointment Properties Personalize

Style: Advanced Properties

Message Id: 4823115A.73D : 219 : 1853  
 Subject: Discuss Groupwise  
 Created By: kroeckn@lumc.edu  
 Scheduled Date: 5/8/2008 2:42 PM  
 Creation Date: 5/8/2008 2:44 PM  
 From: Karen Roeckner

**Recipients**

Recipient	Action	Date & Time	Comment
IT9.LUHS9	Delivered	5/8/2008 2:44 PM	
To: Karen Roeckner (KROECKN@lumc.edu)	Read	5/8/2008 2:43 PM	
	Deleted	5/8/2008 8:50 PM	

**Post Offices**

Post Office	Delivered	Route
IT9.LUHS9	5/8/2008 2:44 PM	lumc.edu

**Files**

File	Size	Date & Time
MESSAGE	527	5/8/2008 2:44 PM
TEXT.htm	379	5/8/2008 2:42 PM

## TASKS

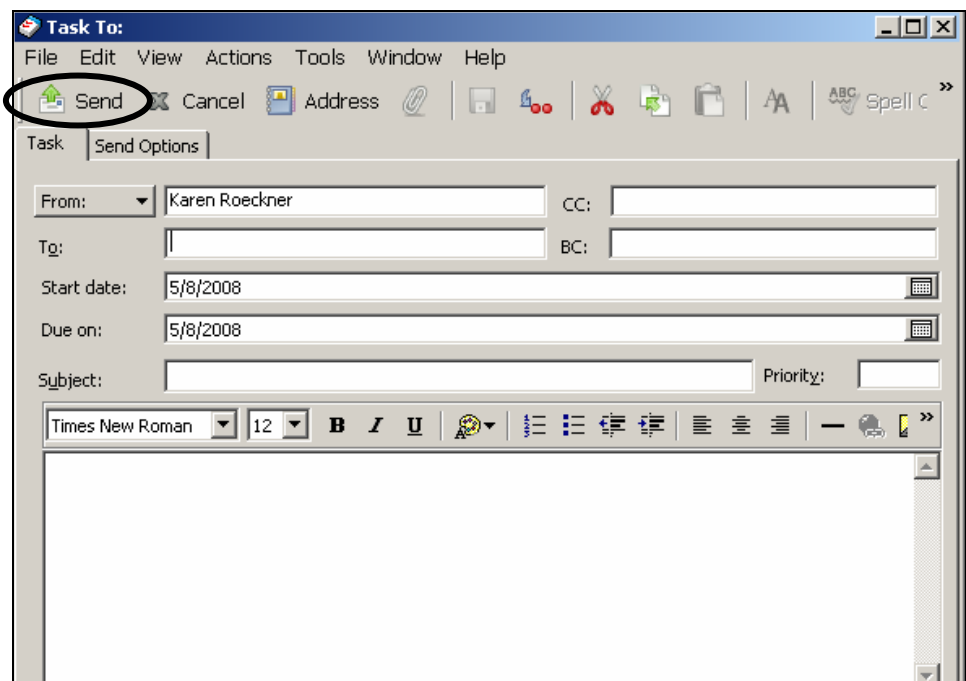
Tasks are used for different reasons than appointments. Tasks do not have scheduled hours. While tasks can be sent to other recipients, posted tasks are used for your calendar only (as are any other posted activities). A task is simply an activity that needs to be performed.

### Sending a New Task

1. On the toolbar, **click** on the **New Task** button.



2. **Complete the form** and **click** on **Send**. By default, the amount of time to complete a task is one day (same day). GroupWise continues to display the task through the next day until you mark the task completed.

A screenshot of a 'Task To:' dialog box. The window title is 'Task To:'. The menu bar includes 'File', 'Edit', 'View', 'Actions', 'Tools', 'Window', and 'Help'. The toolbar contains 'Send' (circled in black), 'Cancel', 'Address', and other icons. The form fields include: 'From:' (Karen Roeckner), 'CC:', 'To:', 'BC:', 'Start date:' (5/8/2008), 'Due on:' (5/8/2008), 'Subject:', and 'Priority:'. The text area at the bottom is empty. The font is Times New Roman, size 12.

## Posted Tasks

1. On the toolbar, **click** on the **down arrow** next to **New Task**. **Click** on **Posted Task**.



2. The **Posted Task**: dialog box appears. **Complete the form** and **click** on **Post**.

**Note:** When you decline or delegate a task, the task is removed from your mailbox. You can also assign a task to another GroupWise user; however, until the task is declined or completed, it will appear in your task list.

### To mark or unmark a task “Completed”

1. **Click “Window, Calendar”**, choose the calendar view you wish to look at.
2. **Click the check box** next to the task; or, **right-mouse click** on the **task** and **choose “Mark Completed”**.
3. To unmark a Completed task, **click the check box** next to the task.

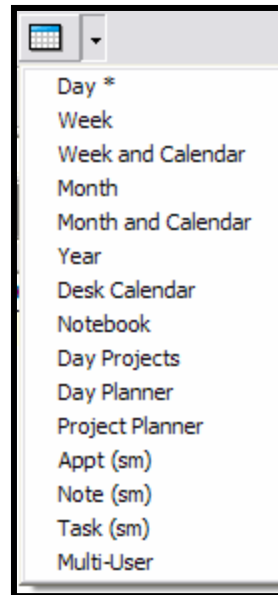
Once you mark a task **“Completed”**, a notification is sent to the person who originated the task if they selected return notification for tasks in Send Options. The person who originated the task can view the completed status, including the date and time the task was marked Completed, in the property window.

## CALENDARS

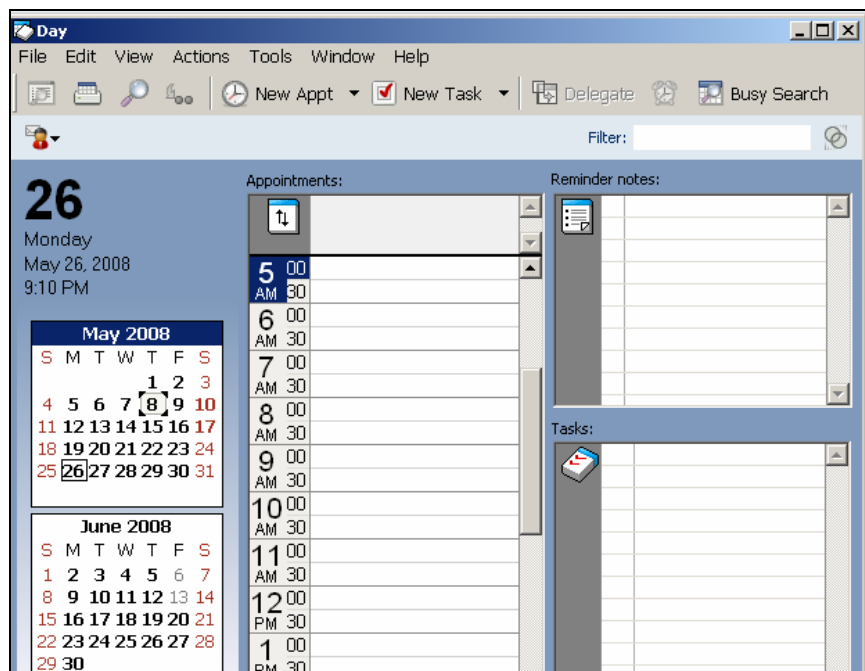
### Selecting a Calendar Style



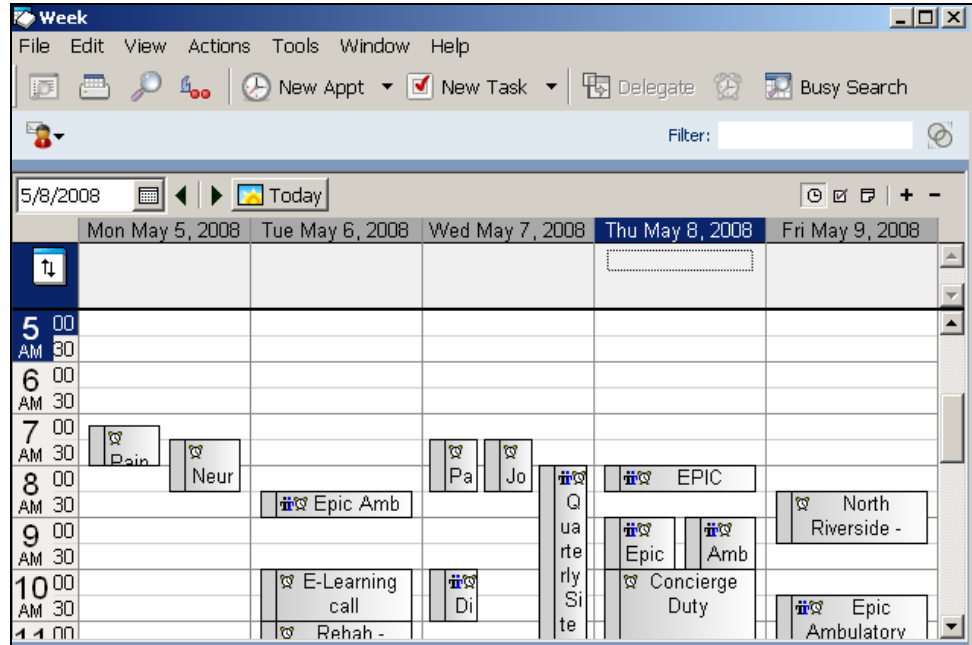
1. You can view your calendar using a variety of modes.
2. **Click on the drop-down arrow next to Calendar** from the main menu. You will now see your choices.



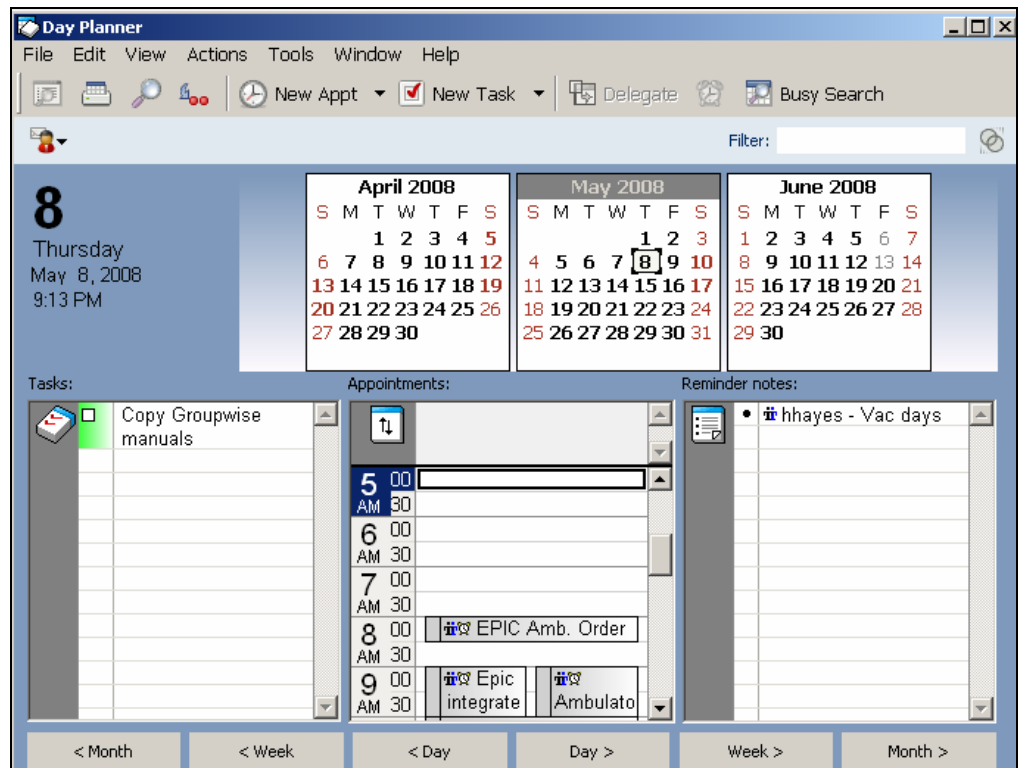
3. You can view using **Day mode** (see example below).



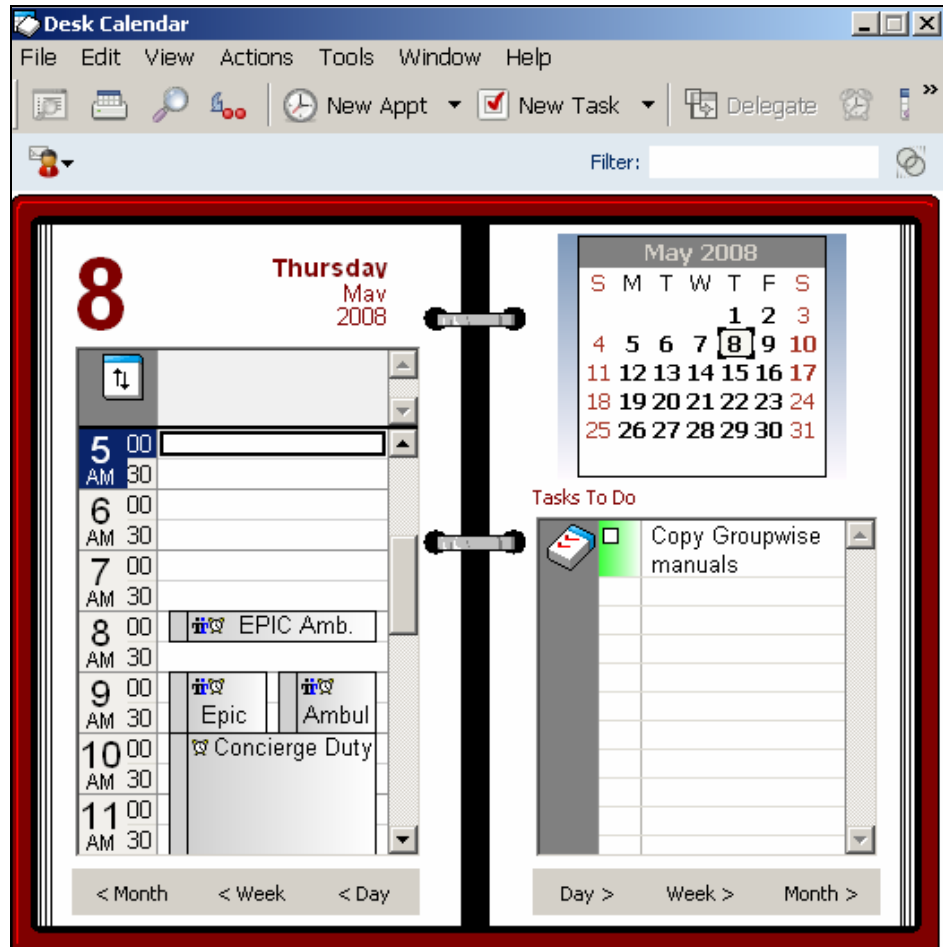
4. You can view the Calendar using **Week mode** (see below).



5. You can view the Calendar using **Day Planner mode** (see below).



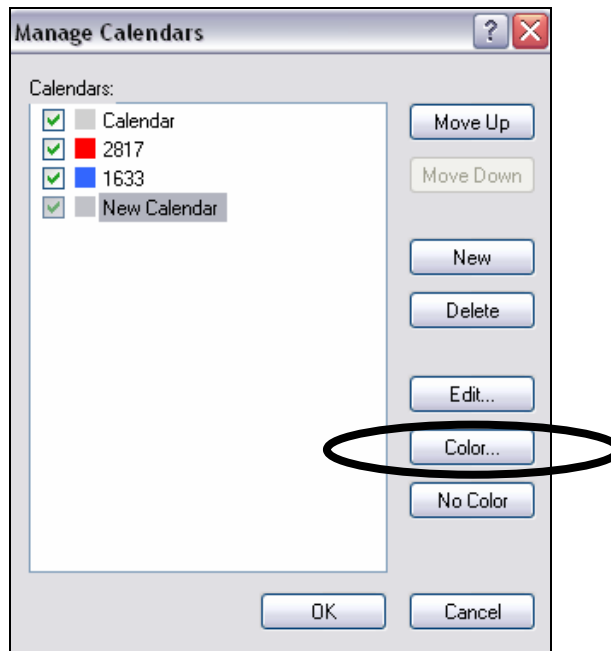
- 6. You can also use the option “**Desk Calendar**”, to see your calendar as a desktop binder (see example below).



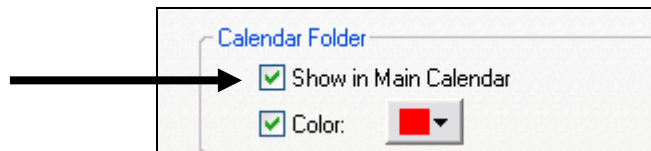
## Creating a New Calendar/Changing the Calendar Colors

You can now create a calendar for separate projects or teams.

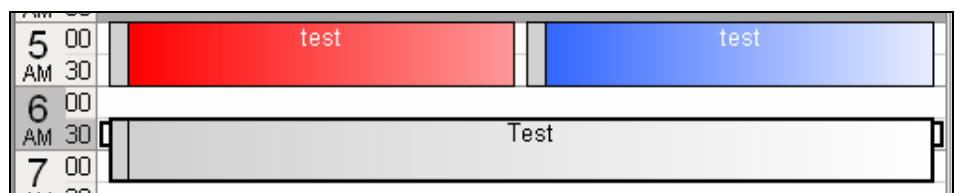
1. Click on **File, New** and click on **Calendar**
2. Enter the **name** of the new calendar
3. Click on **Color** and select **color** and click **OK**



4. You can also decide if you would like your new calendars to be visible on your main calendar. **Right Click** on your calendar and click on **Properties**.



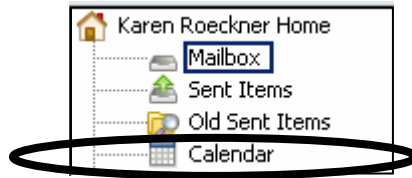
5. For example, the **main calendar has a color of Grey**, the **second calendar has a color of red** and the **third calendar has a color of blue**.



## Multi-User Calendar

You can share your calendars with others (similar to proxy) as well as view other calendars by using the Multi-User icon.

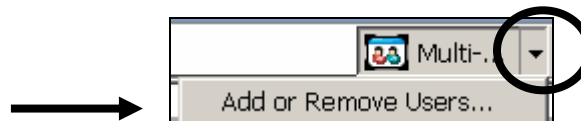
1. Click on **Calendar** from your folder list.



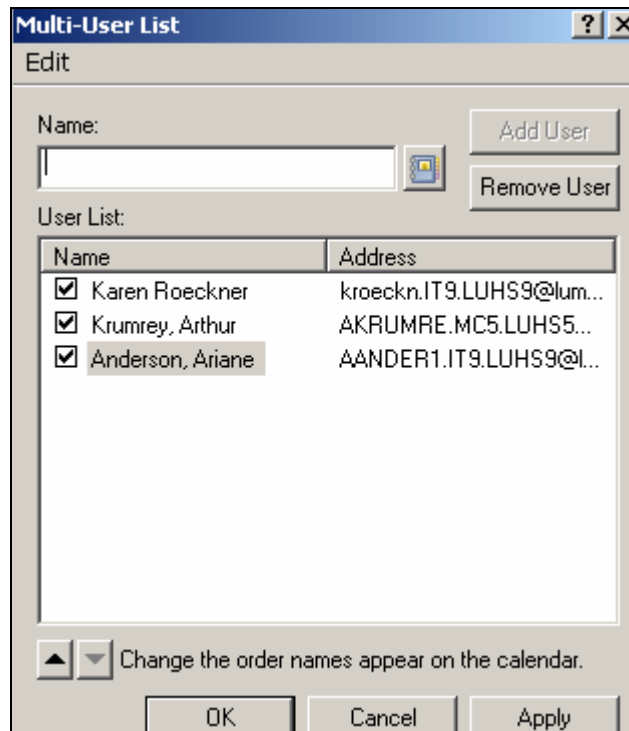
2. Select the **Multi-User** icon.



3. The first time you select the Multi-Calendar view, you will need to select the individuals whose calendars you would like to view by **clicking on the drop down for Multi-User** and then click on **Add or Remove Users**.



4. Using Proxy rights, you can allow others to view your calendar.

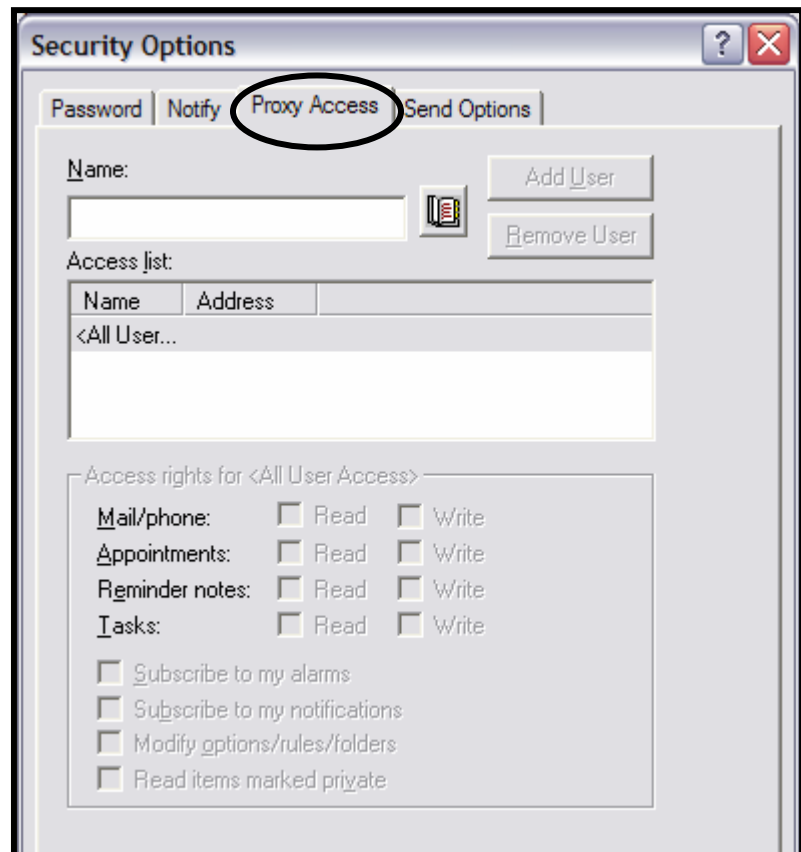


## Setting Access Rights (Proxy)

Proxy is a feature for those that manage the personal Calendar and Mailbox of another user. A proxy can receive access rights to all or some of the items for a particular user.


In order for someone to act as a proxy for you, you must give that user rights in your access list and specify the level of rights the proxy will have.

1. **Click Tools** and then **Options**
2. **Double click** the **Security** icon and **choose** the **Proxy Access** tab.



3. Select the user(s) you wish to grant access to
4. **Highlight** the individual user and **select** the access rights for the proxy user.
5. **Click "OK"**. **Click "Close"**.

## Accessing another User's Mailbox as Proxy

1. Click the **down arrow** next to "Online" for proxy options. 
2. Click on **Proxy** (or select the user's name from the proxy list). **Select the username.**
3. You now have access to this user's mailbox based on access rights (as long as the other person has given you access rights will you be able to access their information).

## Returning to Your Mailbox

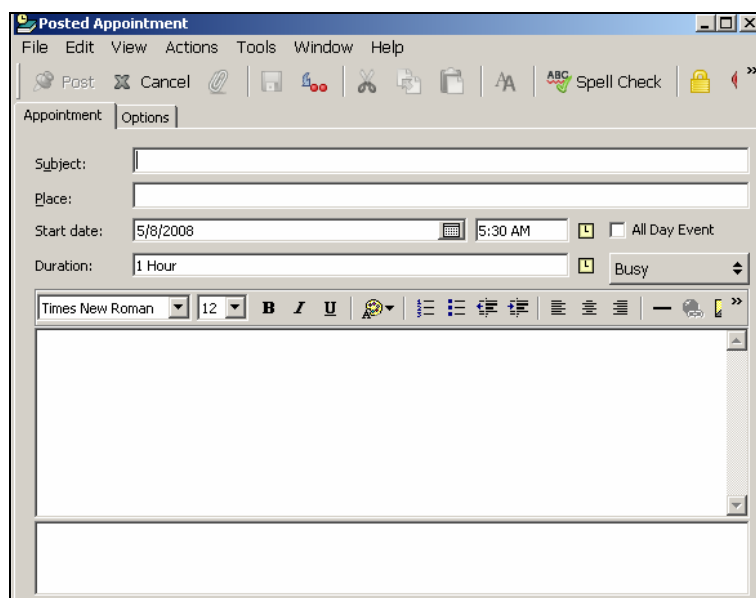
1. Click "**Proxy**".
2. **Select your username** and you will now return to your own Mailbox.

## Inside the Calendar: Adding Tasks and Reminder Notes

- **Double click** inside the **Tasks** area; a task dialog box opens. **Enter** the information you wish to see on the calendar in the **subject field**. **Click on Post**.

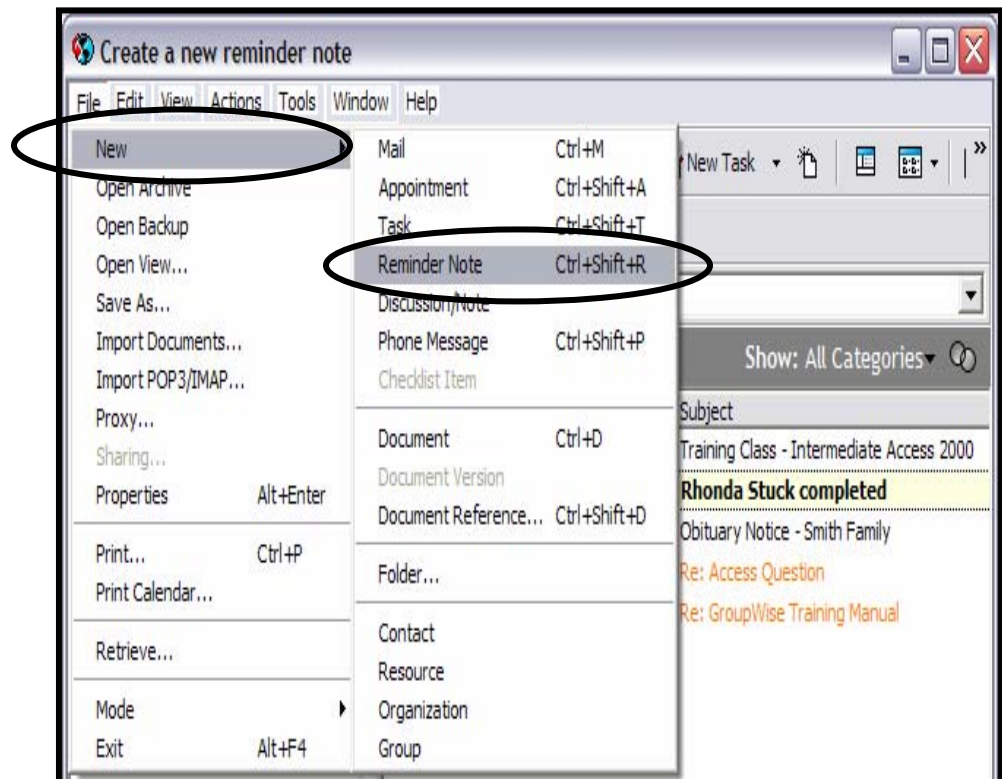
## Inside the Calendar: Appointments

- **Double click** inside the time slot that represents the beginning of the appointment. **Enter the Subject and Place**. **Click on Post**.




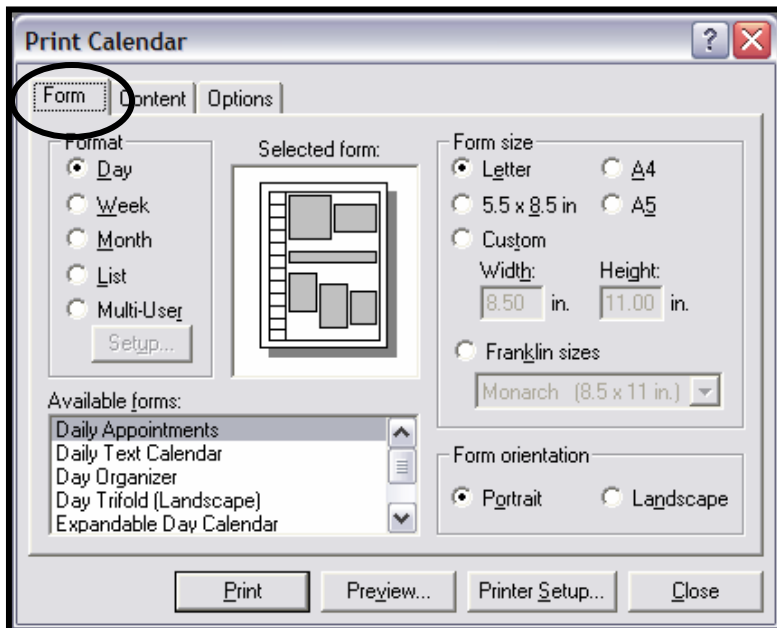
## From the Main GroupWise Window: Creating Appointments, Tasks, and Reminder Notes

Click on **File, New**, and then **click on Appointment, Task, or Reminder Note**.

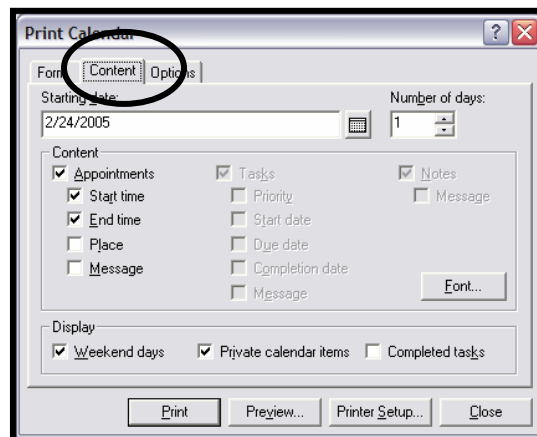


## Printing a Calendar

1. While viewing your calendar, **click the Print Calendar icon**  on the toolbar. **File, Print Calendar** will also allow you to print the calendar and bring up the “**Print Calendar**” window.
2. **Select your options from the Form tab.**



3. **Click on Print.**
4. To use the Content tab, **click on Print** and select the **Content tab**.



5. To use the Options tab, **click on Print** and select the **Options tab**.

## **ADDITIONAL FEATURES IN GROUPWISE 7.0**

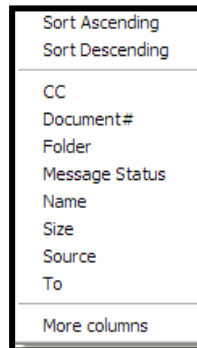
### OBJECTIVES

- ❖ Sorting Items
- ❖ Customizing Columns
- ❖ Creating Filters
- ❖ Finding Items
- ❖ Creating Rules
- ❖ Notify
- ❖ Synchronizing your PDA/Blackberry with GroupWise
- ❖ GroupWise Help/Training

## Sorting Items

You can sort your column in Ascending or Descending order.

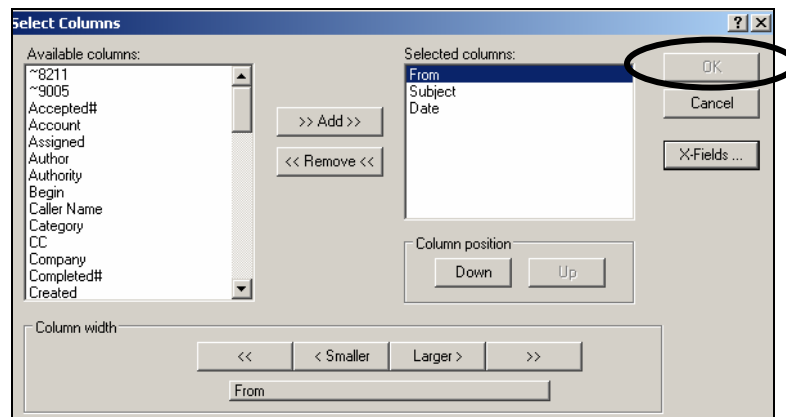
1. **Right click** on the “**From**” column or any other column.
2. **Click on Sort Ascending or Sort Descending.**



## Customizing Columns

You can also customize columns in your mailboxes. For example you can choose what information you would like to see.

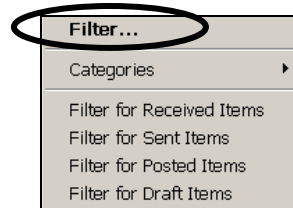
1. **Right Click** on **Name column** (or any column) and **click** on “**More columns**”.
2. You can then add or remove items by clicking on any of the available columns and then **click** on **Add** or **Remove**.
3. You can also change the order of your selected columns. **Click** on the **column name** in the Selected Columns field. **Click** on “**Down**” or “**Up**” to move the column into position.
4. Once you have made all of your changes, **click “OK”**.



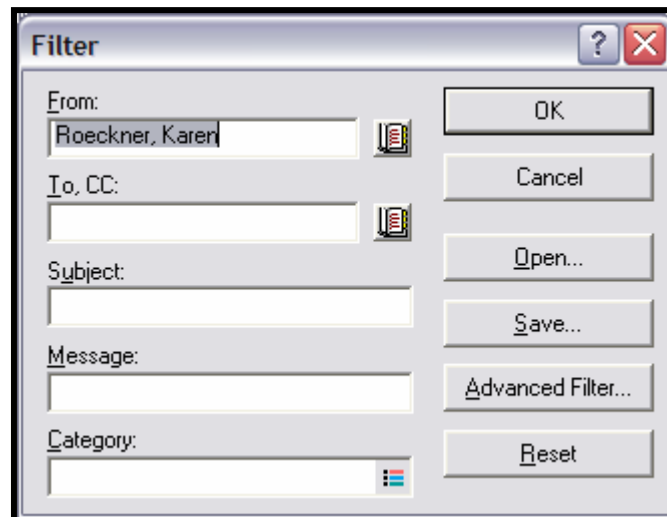
## Creating Filters

Filters can assist you display only those items you want to show. For example you can create a filter that shows only unopened mail messages. Filtering does not delete items or remove them from your Mailbox; it displays items based on the criteria you provide.

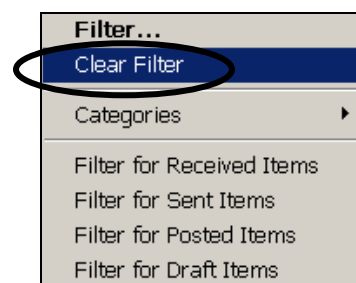
1. To Create a Filter, **click** on the **Filter icon** located in the upper-right corner of your GroupWise Screen. **Select** “Filter” ... to give you more options.



2. **Select** the items and filter options you want and then **click** “OK”. To save the filter, **click** “Save” and give it a name before **clicking** “OK”.



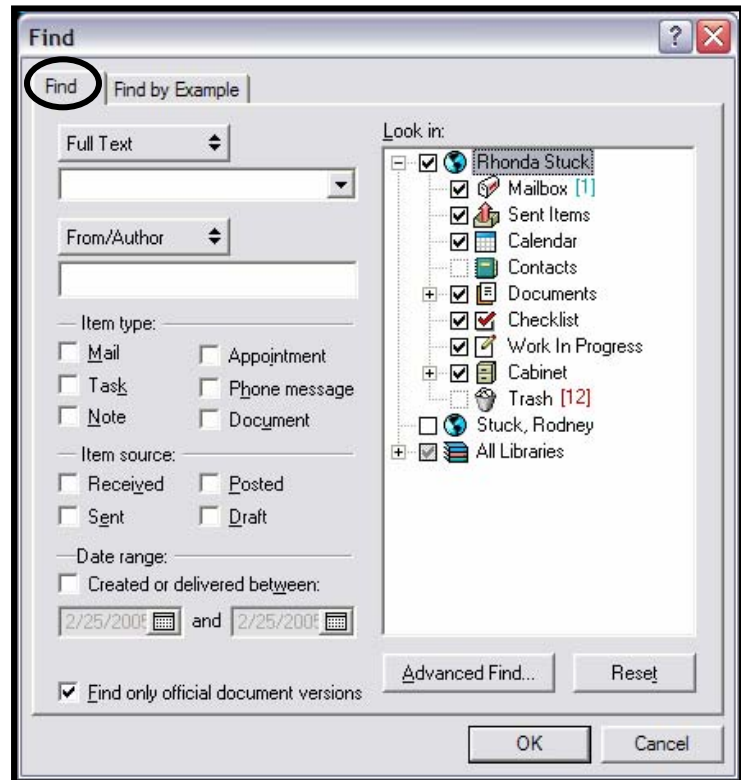
3. To turn off the filter, **click** on the **Filter icon** and then on **Clear Filter** to turn the filter off.



## Finding Items



1. Click the **Find** icon on the Toolbar.
2. Click on the **Find** tab.



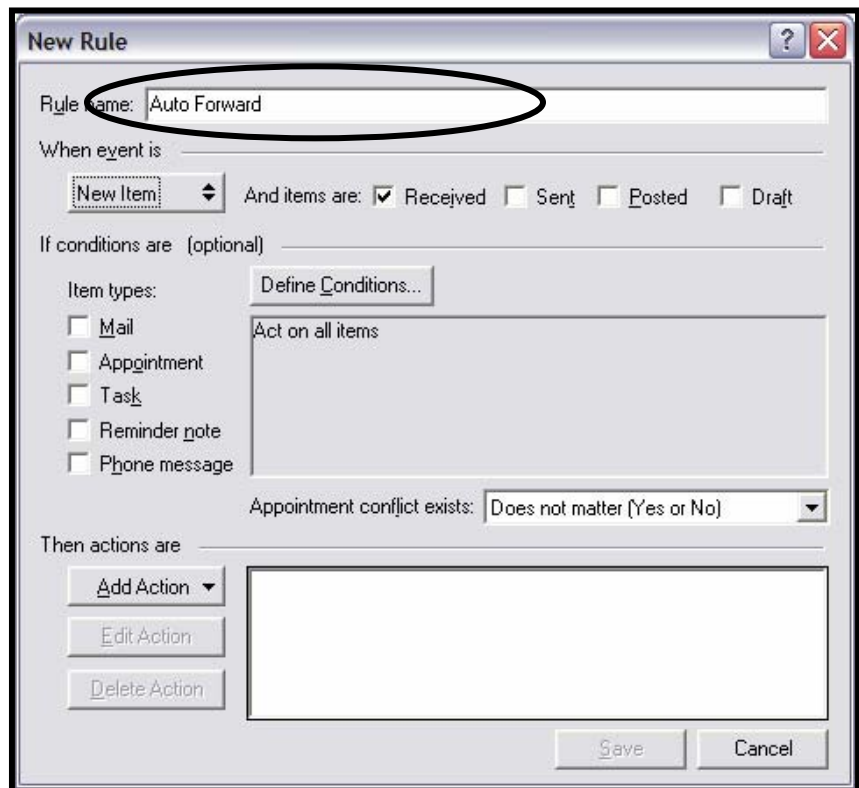
3. Choose the appropriate items – choose **Full Text** or Subject; **From/Author**, and the Item type. You can also choose a date range to more specific.
4. To be even more specific in your search, you can choose a specific location to search in “**Look in**”.
5. You can also use **Advanced Find**. An Advanced Find window appears when clicking on the “**Advanced Find**” button. You can add multiple filtering criteria to help you better search for what you are trying to find.
6. Another type of search is found on the “**Find by Example**” tab. You can search for any item type. The “**Find by Example**” search looks for items that match specified search criteria.
7. In using “**Find by Example** you can now search Attachments as well.
8. Click “**OK**”. GroupWise puts the search results in a “**Find Results**” folder and then opens the folder for you.

If you want to find text in an item that is already open, select “Edit, Find Text”. Specify the text you want to find and click “Find Next”.

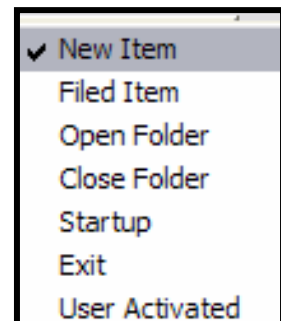
## Creating Rules

Rules can be set so routine tasks are run automatically. For example, if you're going to be out of town for several days, you can have your mail automatically forwarded to someone who will take care of your mail while you are away, or you can have it leave a message to notify people that you won't be able to answer your mail until a certain date. There are basic steps in creating rules:

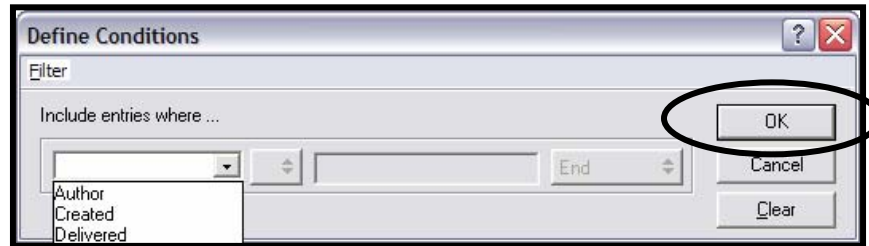
1. Click **"Tools"**, then **Rules**
2. Click **"New"**.
3. Enter the rule name. For example, **Auto Forward**.



4. Specify the event. For example: **New Item**.



5. Set the conditions by item types. For example: Mail, Appointment, Task, Reminder Note, and Phone Message.
6. **Select “Define Conditions”**. Define the criteria for the rule. **Click “OK”** when you are completed defining criteria.



7. **Add the action**. Select any actions you want the rule to do. For example, Forward. You can also enter a message.
8. **Click “Save, Close”**.

### Disable a Rule

Rules are enabled by default. An enabled rule has a check mark next to it. To disable a rule, you need to:

1. **Select “Tools, Rules”**.
2. **Select** (highlight) the rule.
3. **Click the Disable** button.
4. You can also **click** in the check box to turn the rule on or off.

There is no check mark next to the rule once it is disabled.

### Enable a Rule

If you wish to enable the rule again, it may be enabled without being recreated:

1. **Select “Tools, Rules”**.
2. **Click** on the rule.
3. **Click the Enable** button.

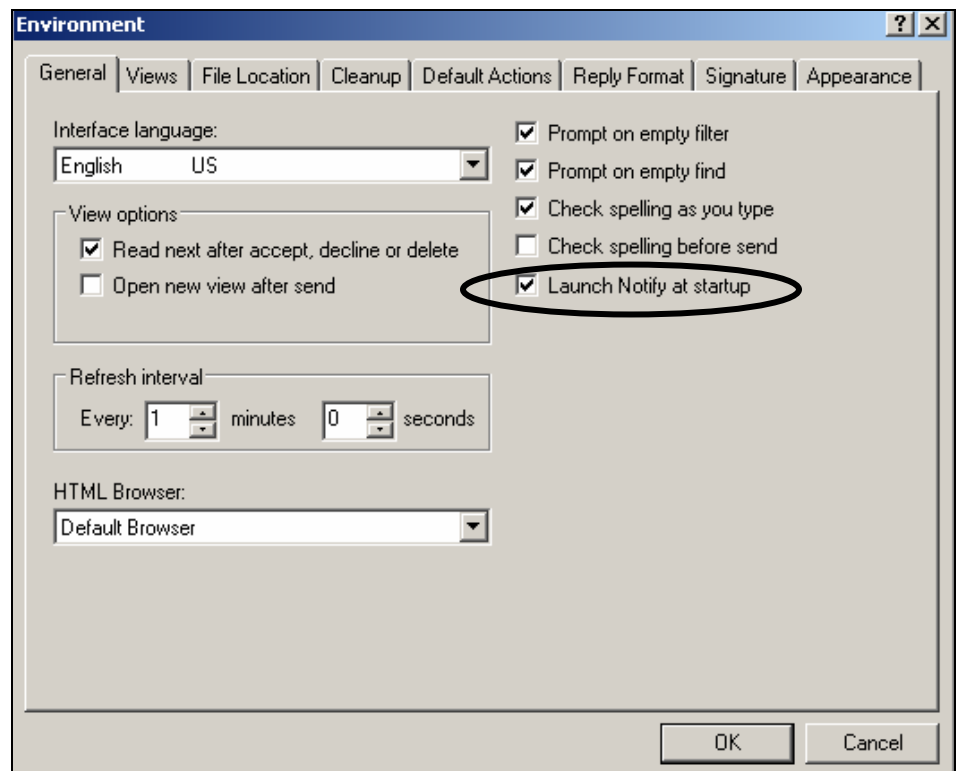
The rule is now again enabled, and there is a check mark next to the rule. You can modify rules by selecting **Tools, Rules**. Select the rule you want to edit. You can copy it before editing by **choosing “Copy”**. **Select “Edit Action”** to change your rule. Once you are completed editing the rule, use the same procedures as listed above for creating rules.

## Notify

If you want to receive a notification that a message has come in to your mailbox, when outgoing items have been opened, or let you know about an appointment, **Notify** will give you this information while you are working in other programs. If you are a proxy for another user, you can also receive notifications for that person as well, when they give you the (proxy) rights to do so.

### To Activate GroupWise Notify

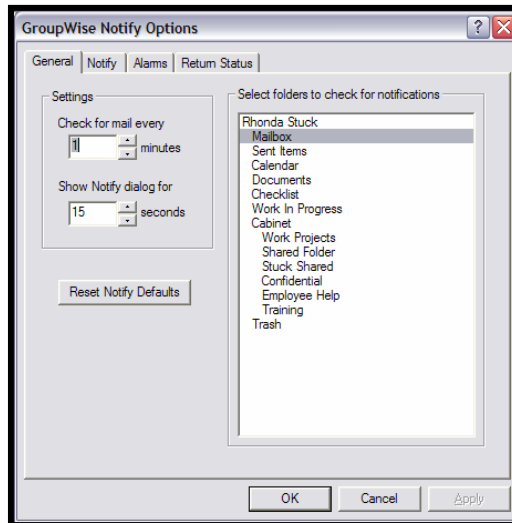
1. From your Windows taskbar, **Select “Start, (All) Programs, Novell GroupWise, GroupWise Notify”**. An icon will appear in the Windows taskbar when “**Notify**” is running.
2. To “Launch” **Notify** at startup, **select “Tools, Options, Environment”**. **Click on the General tab and select “Launch Notify at startup”**. Each time you start GroupWise, **Notify** will automatically start as well.



3. If you want to turn Notify off, **right-mouse click** on the “**Notify**” icon and **click on Exit**.

## Configuring Notify

1. **Right-mouse click** on the **Notify** icon on the Windows task bar. **Click on Options.**
2. You can select and configure all options you want to use with **Notify** on the four tabs in the **GroupWise Notify Options** window.
3. When you have selected all your options, then **click on Apply, OK.** .



## Synchronizing your PDA with GroupWise

The latest version of GroupWise now allows you to Sync your PDA (Pocket PC, Palm, etc.) with GroupWise without the need for additional software. Please download the PDA product from the following site:

<http://www.luhs.org/internal/depts/training/palm/index.htm>

## Synchronizing your Blackberry with GroupWise

A Blackberry can be synced with GroupWise by becoming part of the Enterprise here at Loyola Medicine. Please contact the Help Desk to set up your Blackberry.

For documentation, please go to the following web site:

<http://www.luhs.org/internal/depts/training/palm/index.htm>

## Obtaining GroupWise Help/Training

Please contact the Help Desk at 62160 for GroupWise assistance.

Training is available:

- A Lecture/Lab class is available every other month for a minimal fee. Please register using E-learning by searching for GroupWise.
- A User guide is available for printing. Please go to the following link and click on GroupWise.  
<http://www.lumc.edu/depts/training/index.cfm>
- Within the GroupWise product, click on **Help**. Several options are available.

Help Topics	F1
What's New	
User's Guide	
Interactive Tutorial	
Cool Solutions Web Community	
Novell GroupWise Home Page	
Tip of the Day	
About GroupWise	

**NOTES:**

## **USING THE WEB TO ACCESS GROUPWISE 7.0**

### OBJECTIVES

- ❖ Accessing GroupWise 7.0 on the Web
- ❖ Main Menu
- ❖ Creating a New Message
- ❖ Using the Address Book
- ❖ Using the Calendar
- ❖ Creating an Appointment or Task
- ❖ Options and Proxy in GroupWise Web

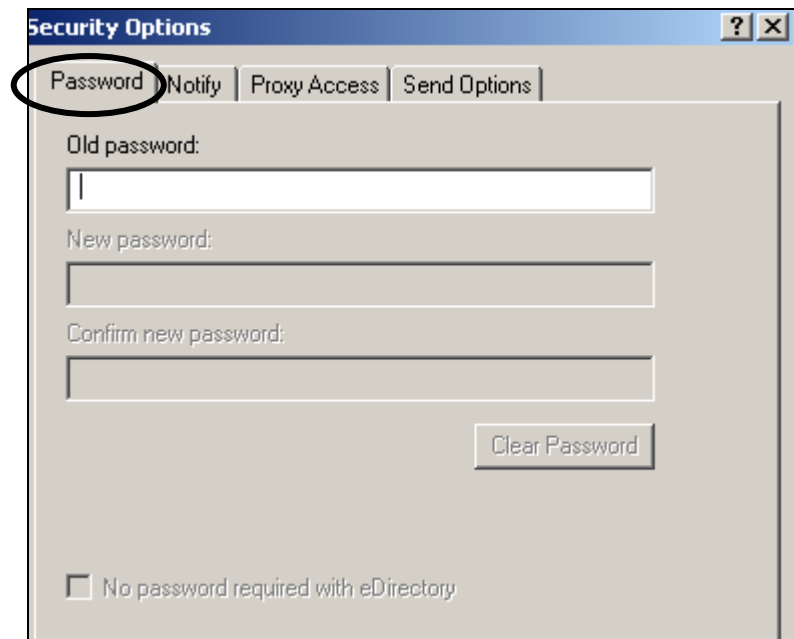
## USING THE WEB TO ACCESS GROUPWISE 7.0

You can log into your email account from the Internet by using a browser (Internet Explorer). This will eliminate the need for you to install GroupWise Remote software on every machine you want to access GroupWise from.

To login, you will need to use your Loyola Universal ID and need to **set a password for GroupWise**.

### To set a password on GroupWise 7.0

1. From the Main Menu in GroupWise, **click on Tools, Options.**
2. **Double click on Security.**
3. **Enter your old password, and then enter your new password.**
4. **In the Confirm New Password, enter your new password again (Note: It is case sensitive)**
5. **Click "OK", and then click "Close".**

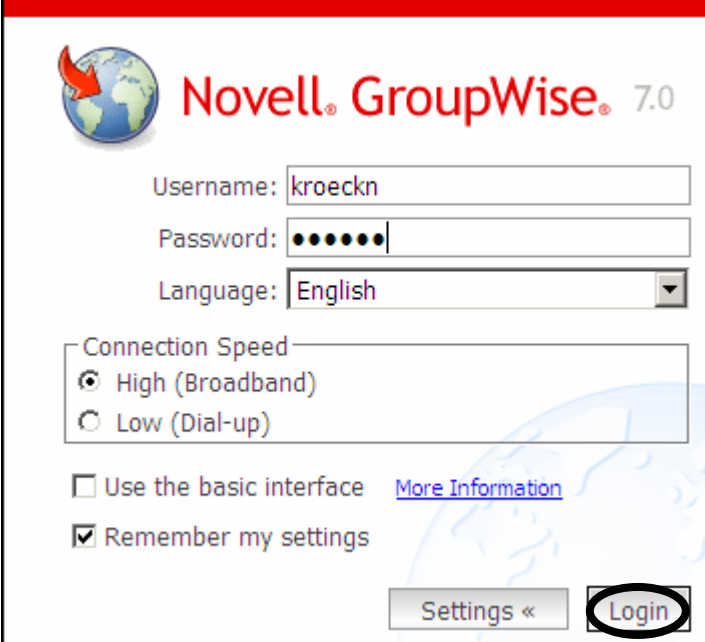


The screenshot shows the 'Security Options' dialog box with the 'Password' tab selected. The dialog contains the following elements:

- Tabbed interface with 'Password', 'Notify', 'Proxy Access', and 'Send Options' tabs. The 'Password' tab is circled.
- Input field for 'Old password:'.
- Input field for 'New password:'.
- Input field for 'Confirm new password:'.
- 'Clear Password' button.
- Checkbox labeled 'No password required with eDirectory'.

## Accessing GroupWise on the Web

1. **Double click** on the **Internet Explorer icon**.
2. **Enter** the URL address: **http://webmail.luhs.org/** (Note: Do not use www)
3. In the name field, **enter** your **Username** (Loyola Computer ID).
4. In the password field, **enter** in your **GroupWise Password**.
5. **Click** on **Login**.



Novell GroupWise 7.0

Username: kroeckn

Password: ●●●●●●

Language: English

Connection Speed

High (Broadband)

Low (Dial-up)

Use the basic interface [More Information](#)

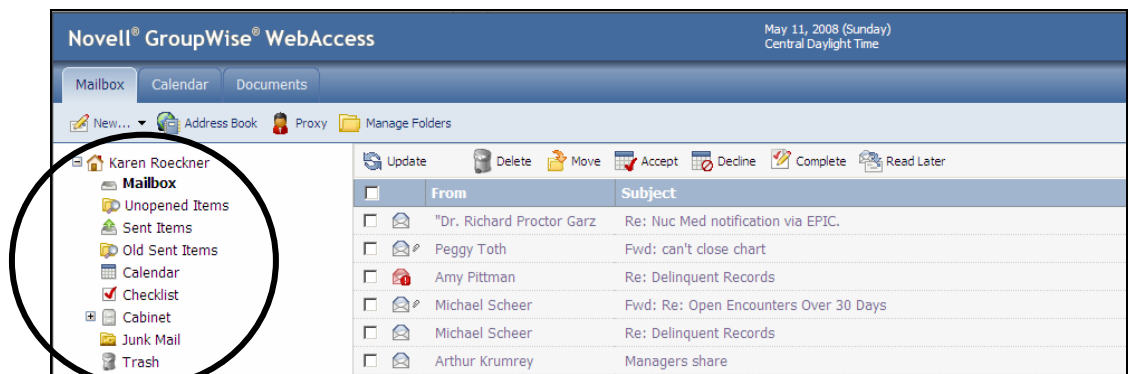
Remember my settings

Settings < Login

## The Main Menu in GroupWise Web

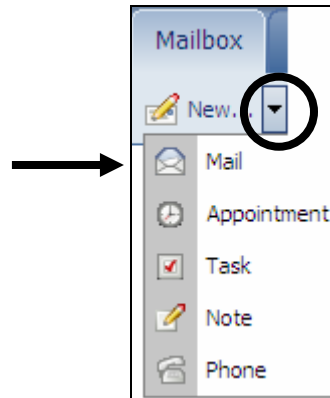
The Main Mailbox screen will appear. Your folder options consist of:

- Mailbox - all messages received
- Unopened items - all unopened messages
- Sent items - all sent messages
- Calendar
- Checklist
- Cabinet
- Junk Mail
- Trash



## Creating New Mail

1. Click on the drop down option for **New...** to create new items. Click on **Mail** to create a new mail message.

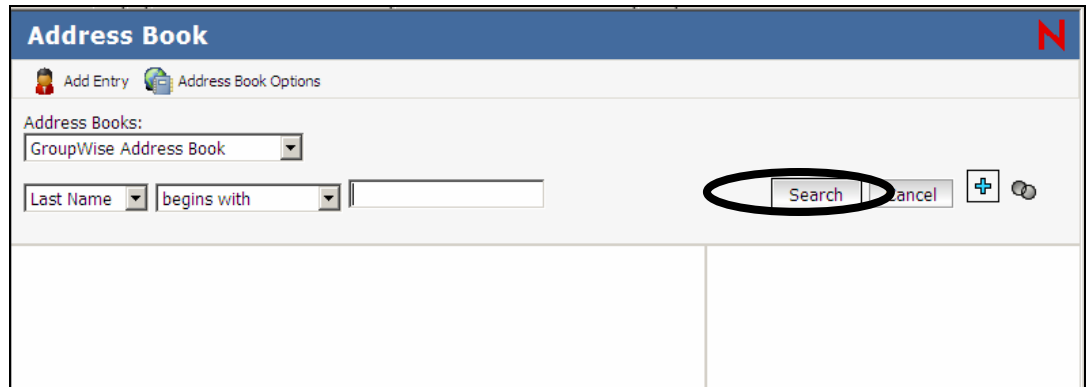


2. The mail message screen will appear. **Enter** all necessary information and **click on Send**. Notice you have a tab for "Send Options" and "Attachments" as well.

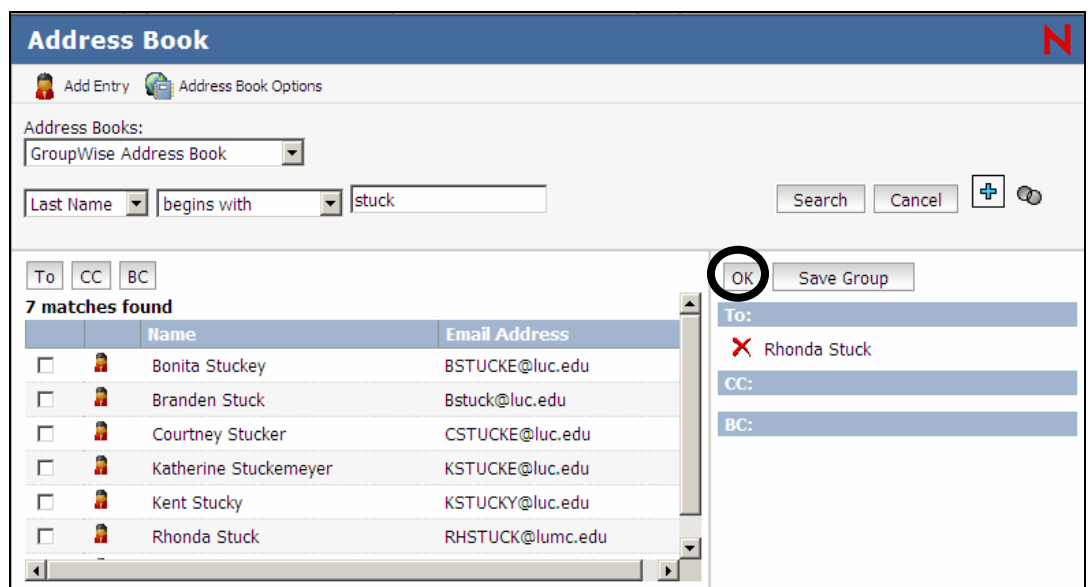
A screenshot of the 'Mail Message' composition screen. The title bar is blue with a red 'N' icon on the right. Below the title bar is a toolbar with buttons for 'Send' (circled in black), 'Cancel', 'Address Book', 'Spell Check', and 'Item Type'. Below the toolbar are three tabs: 'Mail', 'Attachments', and 'Send Options'. The main area contains fields for 'From:' (filled with 'Karen Roeckner'), 'To:', 'Subject:', 'CC:', and 'BC:'. A large text area is at the bottom.

## Using the Address Book

1. **Click on the Address Book** while creating a message or **double click** on the **Address icon**.
2. **Enter the last name** of the user into the appropriate fields
3. **Click on Search**. A minimum of 15 users who match the description can be displayed at one time.



4. **Highlight/click in the box** on the **name** of the person and **click on To:** or **CC** or **BC**.
5. If you want to search for another name, follow steps 2, 3, and 4 again.
6. When you have all the names in the **To:** (CC or BC) box, **click on OK** to go back to your mail message. All of these names will be entered in your e-mail message.

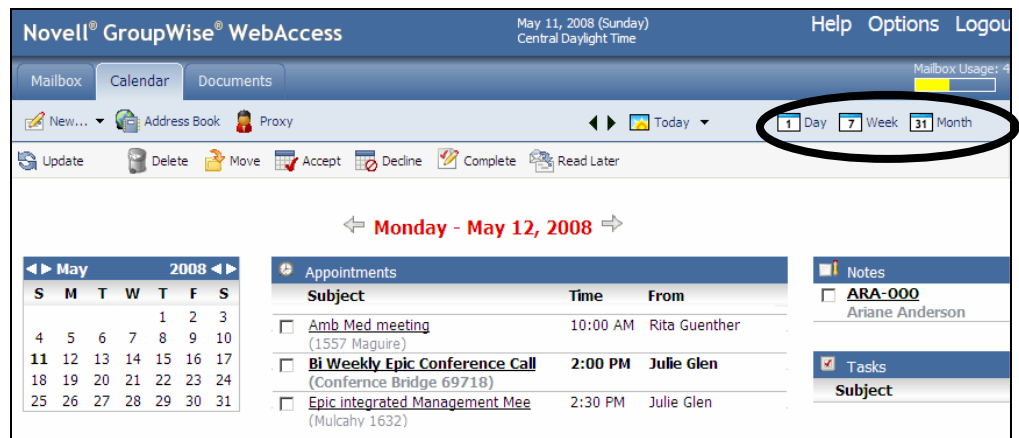


## Using the Calendar

1. Click on the **Calendar** option from your main menu. The main Calendar screen opens.



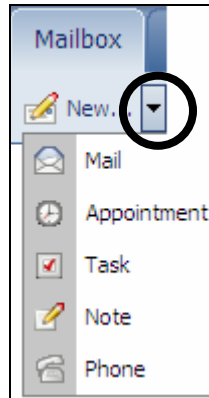
2. You can access the day you wish to view by **clicking** on the **Day** button. The same applies for **Week** and **Month**.



3. To move back a year **click** on the **left arrow**, or **click** on the **right arrow** to move forward a **year**.

## Creating an Appointment or Task

1. Click on the drop down option for **New...** to create new items. Click on **Appointment** to create a new mail appointment. You can also create a Task or Note.



2. Enter all information and click on **Send**.

**Appointment**

Send Cancel Address Book Busy Search Spell Check Item Type

Appointment Attachments Send Options

From: Karen Roeckner CC:

To: Karen Roeckner BC:

Location:

Start Date: May 12 2008

Time: 4:00 P.M. Duration: 1 Hours

Subject:

3. You can also do a busy search to see when a person is available. GroupWise will list all available times for users listed.

To: Arthur Krumrey, Claudia Bakken BC:

Location:

Start Date: May 14 2008

Time: 3:00 P.M. Duration: 1 Hours

Subject:

Available times	Users not searched	Users searched
Thursday - May 15, 2008 8:00 AM - 9:00 AM 2:00 PM - 3:00 PM		AKRUMRE CBAKKEN
Friday - May 16, 2008 8:00 AM - 9:30 AM 11:30 AM - 1:00 PM		

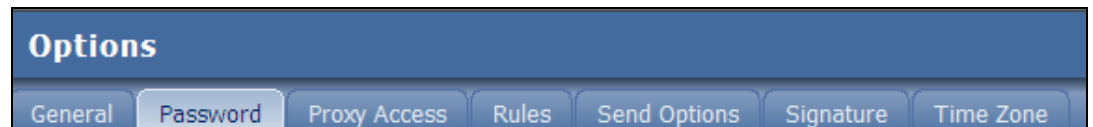


## Options on the Web Version

The following options are also available on the Web version by clicking on the “Options” icon.



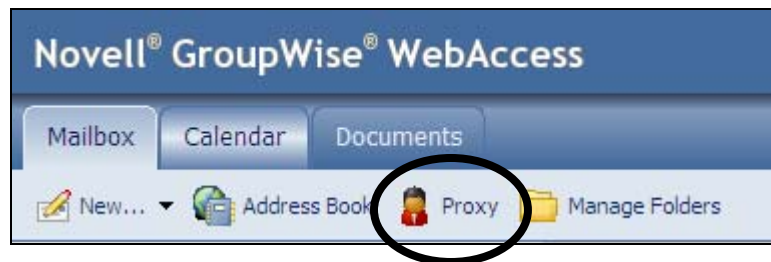
You can make changes to the following items:



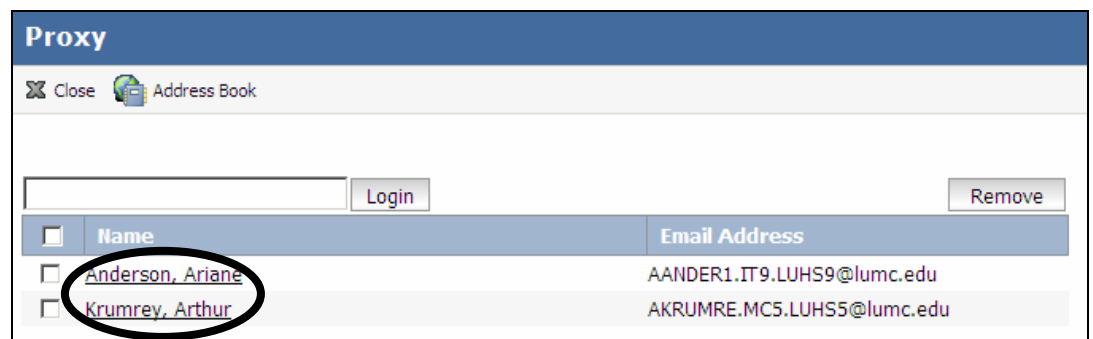
## Proxy on the Web

You can use the proxy option to proxy to all accounts on the web that you have access to in GroupWise.

1. Click on **Proxy**



2. Click on the **name** of the mailbox you wish to proxy to.



3. To return to your own mailbox, **click on the X to close the proxy link.**

