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BUSINESS DRIVEN EMAIL

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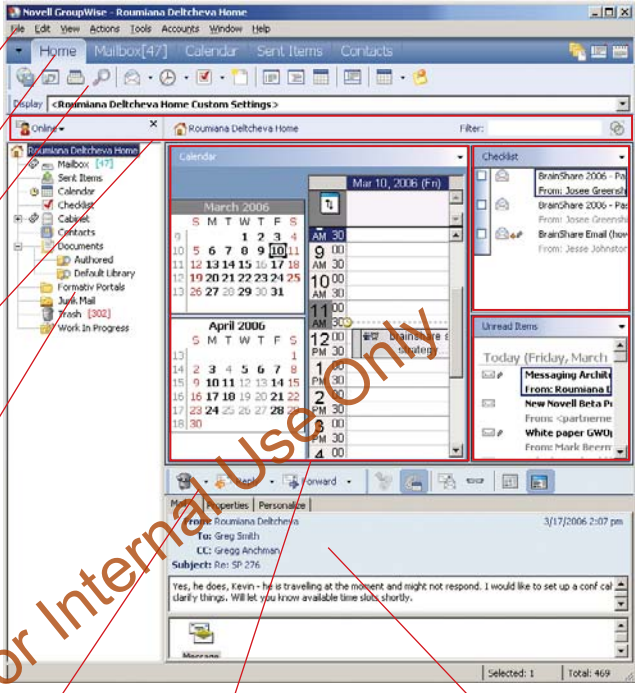
Novell® GroupWise® 7 Quick Reference Card

GroupWise Main Window

The main window provides easy access to your messaging and collaboration activities and consists of: **Main Menu Bar – Nav Bar – Toolbar – Folder & Item List Header – Folder List – Panels – QuickViewer**



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Main Menu Bar: Provides access to the different actions & options of the GroupWise client.

Nav Bar (customizable): Gives you quick access to frequently used folders.

Toolbar (customizable): Gives you quick access to common tools & actions.

Folder & Item List Header: Lets you choose GroupWise access mode (online, caching, remote), the GroupWise archives, and proxy into other accounts. The icon lets you filter items based on specific criteria.

Folder List: Lets you organize your items in your GroupWise mailbox.

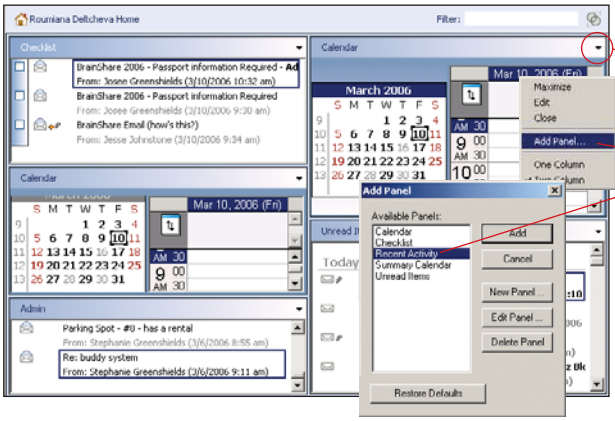
Context Sensitive Toolbar: Provides direct access to actions associated with the selected message.

Panels (customizable): Display frequently needed information from Unread Items to Calendar(s) and can be modified to display your most important activities.

QuickViewer: If enabled, displays the contents of the selected items.

Home View: Panels

The Home view is organized using panels, which are customized views of GroupWise information. Default panels are **Unread Messages, Calendar, Checklist,** and **Contacts;** you can also create your own custom panels.

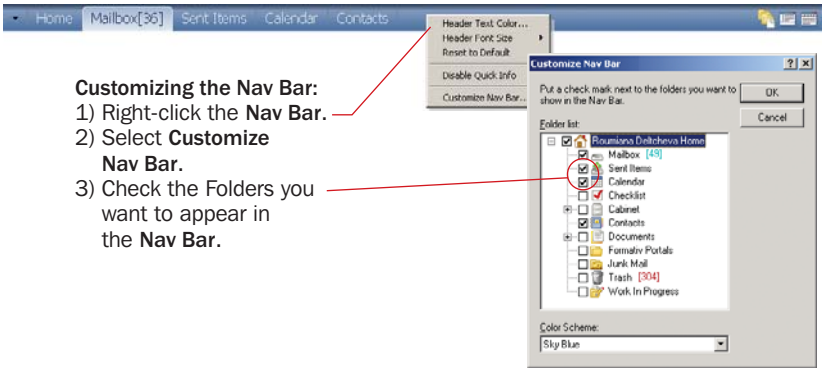


Adding a Panel

1) Click the toolbar arrow to display the context-sensitive menu.
2) Select **Add Panel.**
3) Choose a predefined panel from the list and click **Add.**
   or
   Click **New Panel** to add a custom item to the default list.

Nav Bar

You can customize the color scheme and add or remove the items you want displayed in the **Nav Bar.**



Customizing the Nav Bar:
1) Right-click the **Nav Bar.**
2) Select **Customize Nav Bar.**
3) Check the Folders you want to appear in the **Nav Bar.**

Toolbar

Click the respective icon below to execute common collaboration actions in GroupWise.

A - Open the **Address Book**
B - Display the **Properties** of the selected item or folder
C - Print your GroupWise **Calendar**
D - Find an item (Ctrl+F)
E - Create a **New Mail** message (Ctrl+M)
F - Schedule a new group **Appointment** (Ctrl+Shift+A)
G - Assign a **Task**
H - Create a new **Document** (Ctrl+Shift+T)
I - Launch the **QuickViewer** on the selected item
J - Main Window **Details** view
K - Main Window **Calendar** view

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Folder List

Home – Displays the user's name and contains all items in that account's database.

Mailbox – All incoming items are received in your GroupWise Mailbox.

Sent Items – Folder containing copies of all sent items.

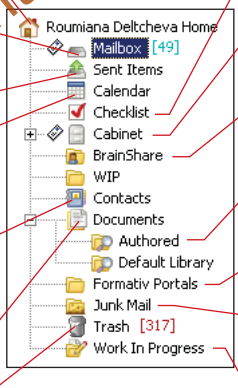
Calendar – Opens your calendar to display all items for the specified day, week, or month.

Contacts – Gives you direct access to your GroupWise Address Books.

Documents – Contains personal and shared documents stored within GroupWise through DMS.

Trash – Stores deleted items for 7 days (default setting).

Click the ⊞ or ⊟ signs to expand or collapse folders.



Checklist – Items dragged into this folder can be prioritized and checked off when completed.

Cabinet – Default location for organizing personal and shared folders.

Shared Folder – Place items to be shared with other GroupWise users with access privileges.

Find Results – Stores searches using predefined or custom criteria.

Personal Folder – Store and organize messages thematically.

Junk Mail – Items identified as junk mail by GroupWise are automatically sent here upon receipt.

Work in Progress – Location for items you want to finish later.

Managing your GroupWise Mailbox

The Mailbox window displays your incoming mail.

1) Sending Email

There are 2 ways to create a new mail:

From the **Menu Bar: File > New > Mail** (Ctrl+M).

From the **Nav Bar:** Click the icon.

Managing your GroupWise Mailbox - Continued, next panel.

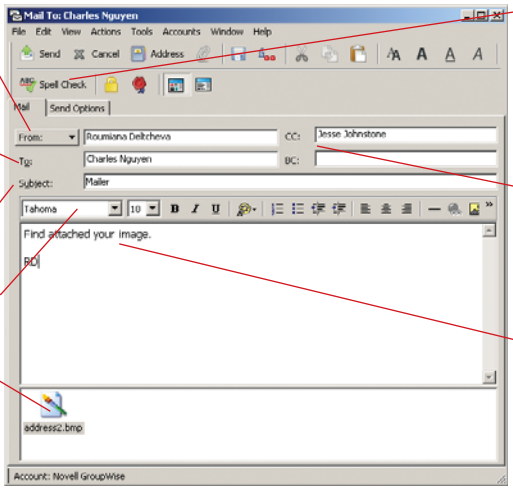
From: Send the message from your or another user's account to which you have **Proxy access.**

To: Enter the recipient's name. You can also use the **Address Selector** icon on the **Toolbar.**

Subject: Enter the email subject.

Message Text Toolbar: Lets you improve the message appearance.

Attach Files: Click the icon, browse and select the file, and click **OK.** Repeat for all files you need. You can also drag-and-drop file(s).



Spell Check: Launches the GroupWise spell check. GroupWise 7 automatically corrects your spelling as you type and underlines typos in red.

CC: and BC: Send a carbon copy and/or a blind copy of the message to other users. Other recipients can't see when a BC is sent.

Message field: Type the content of your message.

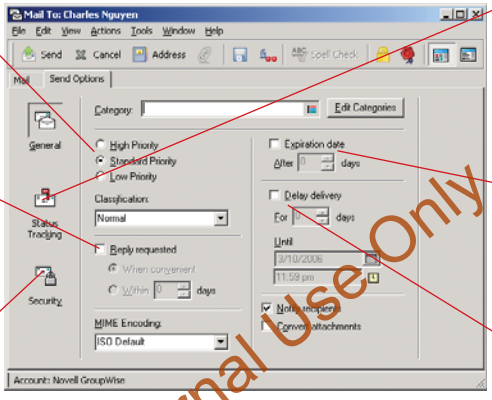
2) Send Options

The **Send Options** tab gives you additional flexibility and lets you categorize, prioritize, classify, track, encrypt, and schedule when the message is sent out.

Priority Status: Messages flagged as High priority appear in **Red**, Standard (default) appear in **Black**, and Low appear in Grey in the recipient's mailbox.

Reply Requested: Notifies the recipients that a reply to the message is expected by a specified time frame.

Security: Lets you set a password for the message or encrypt the message.



Status Tracking: Advanced options that let you track your messages and get notified upon their delivery and actions from recipients.

Expiration Date: If enabled, removes the message from the recipient's mailbox after a specified period of time.

Delay Delivery: Allows you to pre-schedule when a message is sent out.

3) Click Send icon to send the message.

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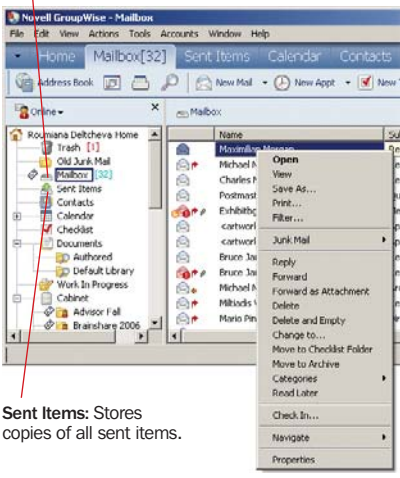
Managing Messages

GroupWise 7 offers a number of features to improve message management. You may organize your email items with color-coded categories, personalize the subject of an item, and file the messages in specific Cabinet folders.

Mailbox: Stores received mail items.



Sent Items: Stores copies of all sent items.

Right-click an item to display the action menu.

Open: Displays the message content and/or properties of a sent item.

View: Opens the viewer to display the message.

Save as: Saves the message and/or attachments.

Print: Prints the message and/or attachments.

Filter: Displays only the messages similar to the highlighted one based on designated criteria.

Junk Mail: Enables junk mail handling.

Forward: Forwards the highlighted item to another recipient.

Delete/Delete and Empty: Moves the highlighted item to the Trash or deletes the message from the system.

Resend: Resends the item after necessary changes have been made.

Change to: Changes the message type (e.g., message to task or appointment, etc.).

Move to Checklist: Moves an item to the Checklist folder.

Categorize: Classifies the item in a specific category and color-codes it.

Read Later: Marks the message as unread.

Properties: Displays details regarding the message (e.g., timestamp, delivery status, recipients, etc.).

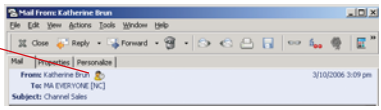
Managing Messages - Continued, next panel.

Received Messages

Opening Received Items: In your **Mailbox**, double-click the item you want to open.
Close: Closes the item and returns you to your **Mailbox**.
Reply: Lets you reply to the message.
Forward: Lets you forward the message to another user.

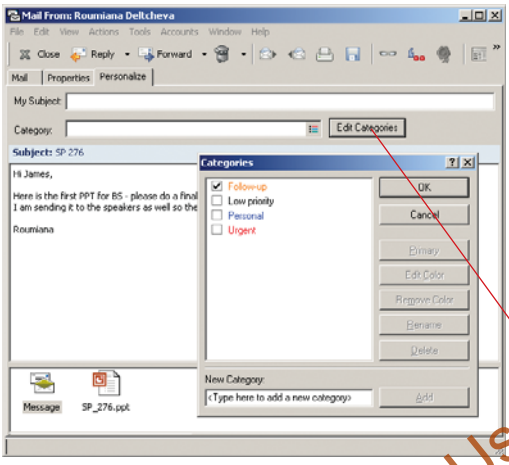
: Sends the message to your Trash.
: Goes directly to the Next or Previous message in your **Mailbox**.
: Lets you print the message.
: Lets you save the message and/or attachments.

: This **New Feature** in GroupWise 7 lets you know if a user is available. To send an instant message, click the icon and start your conversation.



Personalizing Mail Items

GroupWise 7 lets you change the subject line of a received message to a more meaningful heading and categorize items to improve how your information is organized.



1) Open a message and click **Personalize**.
2) Type a new subject in **My Subject**.
3) Click the icon and select a category from the **Categories** list. The mail item is color-coded with the color corresponding to that category.

Edit Categories: Lets you create your own categories and custom colors. Type a new category in the **New Category** field and click **Add** to include the new category in the list. Click **Edit Color** and select a color to apply to the category.

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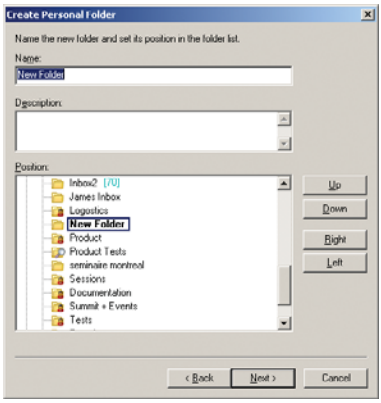
Filing Messages in Personal Folders

Organize your mail items into Cabinet folders.

To create a personal folder:
1) Right-click the **Cabinet** folder in the **Folder List** or select **File>New>Folder** on the **Menu bar**.
2) Select **Personal Folder** and click **Next**.
3) Give your folder a name and a description (optional) and click **Next**.
4) Click **Finish**. The folder now appears in the **Cabinet** tree structure.
5) Drag and drop mail items from the GroupWise **Mailbox** or **Sent Items** folder into the new personal folder.



Finding Items in GroupWise

Use the GroupWise Find feature to locate items in your account.

1) Click the **Find** icon on the **Tool Bar**.
2) Specify the search criteria.
3) Select **Full Text** to search the body of your items. Select **Subject** to limit the search to the subject of the items.
4) Select the **From** or **To** field to search items sent or received by specific users.
5) Select the **Item type** you want to conduct the search on.
6) Optionally, select the **Date range** of the search.
7) **Look in:** Select the accounts, expand the folders and select subfolders to limit the search.
8) Click **OK**. GroupWise displays the results in the **Find Results** folder.

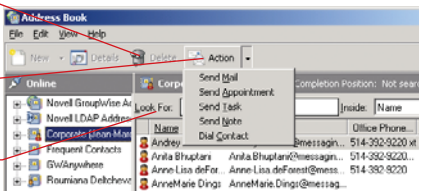
Address Book

The GroupWise **Address Book** can be used to manage your business and personal contacts. In addition to the **System Address Books**, you may create additional personal and shared address books as needed.

Delete: Lets you delete the selected entry in the Address Book.

Action: Lets you perform a variety of actions on the selected entry.

Look For: Lets you quickly search for a given contact by a specified parameter.



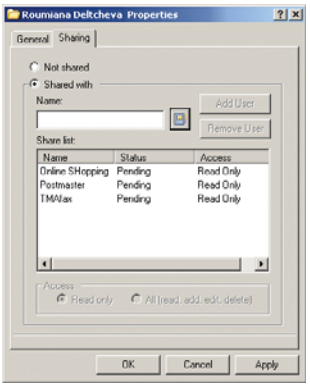
New: Lets you add a new entry in the selected Address Book.

Details: Displays the contact info of the selected entry in the Address Book.

Creating a New Personal Address Book

1) Click the icon on the **Toolbar to** open **Address Book**.
2) Select **File>New Book**.
3) Define a name for the new Address Book and click **OK**.

Sharing a Personal Address Book



1) Open the **Address Book**.
2) Follow the steps for creating a new Personal Address Book or right-click an existing one.
3) Select the **Sharing** tab and choose **Shared with**.
4) Click the icon to select a user you want to give access to the Address Book.
5) Click **Add User**.
6) To change the access rights, highlight the user in the shared list and check the desired access rights.
7) Click **OK**.

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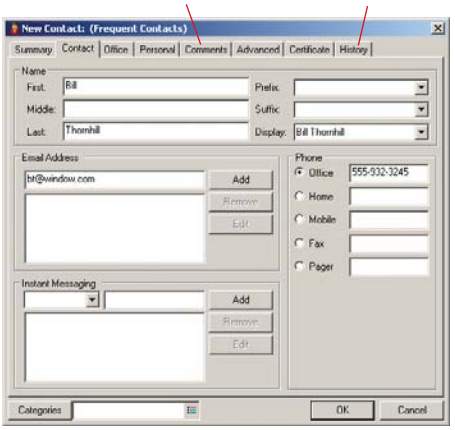
Removing Access Rights from a Personal Address Book

1) Open the **Address Book**.
3) Select the **Sharing** tab and choose **Shared with**.
4) Select the user with sharing access to the **Address Book**.
5) Click **Remove User**.
7) Click **OK**.

Creating a New Contact in the Address Book

Comment Tab: Add additional information about interactions with the contact.

History Tab: Displays all Email and Calendar events involving contact (only available from the Contacts folder in the Main Window).



1) Open the **Address Book**.
2) Select the personal **Address Book** you wish to add the contact to.
3) Click the **New** contact icon on the **Toolbar**.
4) Enter the contact information.
5) Click **OK**.

To view and/or update an existing contact

1) Open the **Address Book**.
2) Select the personal **Address Book** you wish to edit.
2) Double-click the contact.
3) Select the specific tab you wish to edit and modify the contact info as needed.
4) Click **OK**.

Calendaring and Task Management

The GroupWise **Calendar** lets you manage **Appointments** and **Tasks**. You can create multiple calendars and share calendars with others.

To access your **Calendar**, click **Calendar** in the **Nav Bar** or select the **Calendar** folder in the **Folder List**.

Use the **Navigation** buttons **<>** to display the next or previous dates. Click a date to display the events for that day. Dates in **bold** indicate scheduled activities.

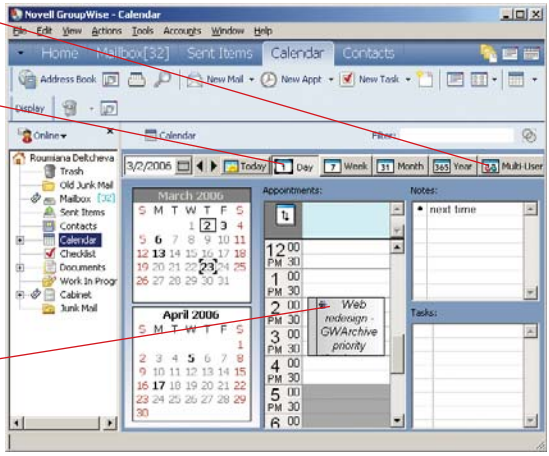
Multi-User : Displays calendars for other users' calendars you have proxy access to.

Day : Lets you select the calendar view you prefer: day, week, month.

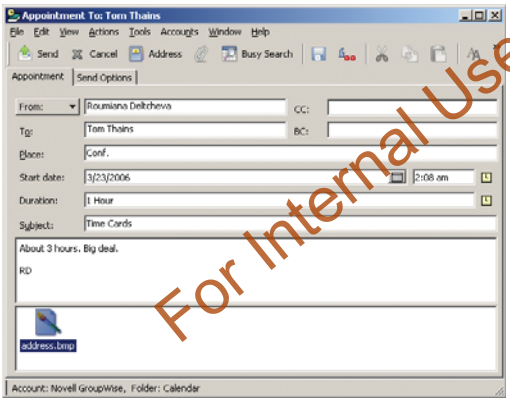
To create a new **Appointment**, **Task or Note**, double-click the respective item area or use the icons on the **Toolbar**.

To view an existing Calendar item, double-click it to open and view the details.

To reschedule an item, drag it to the updated date and time (does not apply to group appointments sent by another user).



Scheduling a Group Appointment



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1) Click the icon on the **Toolbar**.
2) Enter the recipient(s) in the **To** field.
3) Enter the meeting location in the **Place** field.
4) Enter the **Start Date** and **Time**.
5) Enter the **Duration** of the meeting.
6) Type a **Subject** and optional message for the Appointment.
7) Click **Send**.

Using Busy Search

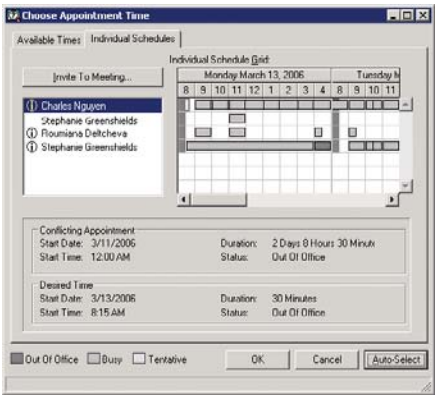
When creating a **Group Appointment**, you can search other GroupWise users' calendars to find time blocks that are suitable for all attendees.

To do a busy search:

1) Click the icon on the **Toolbar**.
2) Click the icon on the Appointment **Toolbar**.
3) Click **Invite to Meeting**.
4) Select the attendees on which to perform the busy search.

Auto-Select: Identifies the earliest time slot when all users are available.

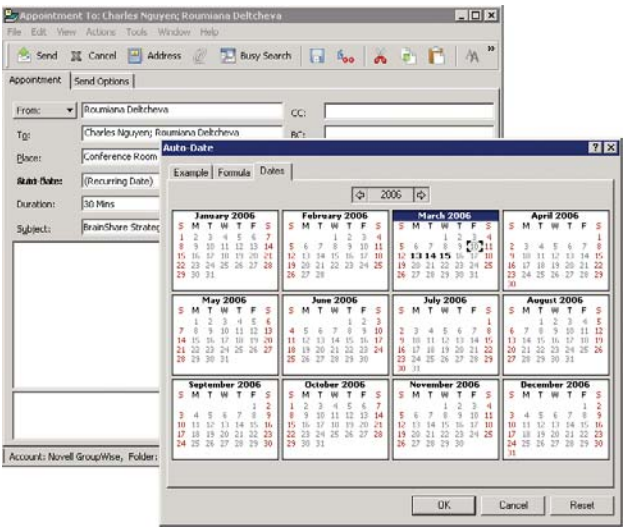
5) Locate a time when all attendees are available and block this time.
6) Click **OK**.
7) Complete the appointment details as described above.
8) Click **Send**.



Calendaring and Task Management - Continued, next panel.

Recurring Appointments, Tasks, and Notes

GroupWise can schedule recurring appointments, tasks and notes. Use this feature to schedule recurring and periodic events.



1) Click **New Appointment**, **New Task**, or **New Note** on the **Toolbar**.
2) Select the icon in the **Start Date** field.
3) Click **Select Recurring** hyperlink at the bottom of the window.
4) Click the **Date** tab and choose the recurring dates on the Calendar. They are displayed in **bold**.

Multiple Calendars

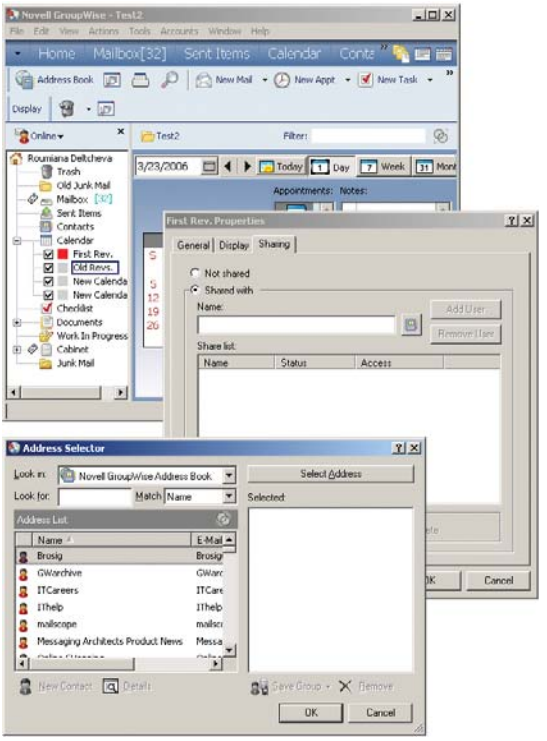
Use this **New** GroupWise functionality to manage specific activities independently, share an activity calendar with a team, or separate your personal from your professional activities. In your main calendar view, events are highlighted in the color assigned to each calendar.

Creating a New Calendar

1) Right-click the **Calendar** folder.
2) Select **New Calendar**.
3) Type a name for each new calendar.
4) The new calendars appear in the **Calendar** folder.

Sharing a Calendar

1) In the **Calendar** folder, right-click the calendar you wish to share.
2) Select **Sharing** and click **Shared with.**
3) Select the user(s) from the GroupWise Address Book.
4) Click the **Select Address** button.
5) Click **OK**.
6) Highlight the user in the **Shared** list.
7) Grant additional access rights to the user as you wish.
8) Click **OK**.



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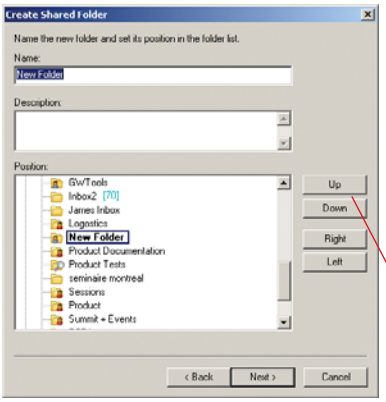
Sharing Folders

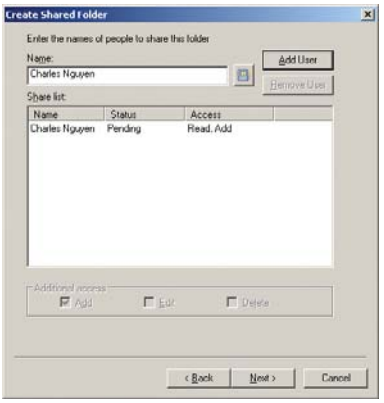
Items placed in a GroupWise **Shared Folder** are instantly available to everyone with access to that folder. You can share **Messages, Appointments, Notes,** and **Tasks.**



To create a shared folder:

1) In the **Folder List**, right-click the **Cabinet.**
2) Select **New Folder.**
3) Select **Shared Folder.**
4) Enter a name for the new folder and optional description.
5) Click **Next.**

Position the folder in the **Cabinet** using these buttons (Up and Down).



6) In the **Name** field, enter the name of the person or click the icon and select the user(s) from the GroupWise Address Book.
7) Click **Add User.**
8) Repeat until all users have been added.
9) By default all users are granted **Read** and **Add** rights. To grant or take away rights for a particular user, highlight the user and select/deselect the specific right.
10) Click **Next.**

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Add: Allows the user to place new items into the shared folder.
Edit: Allows the user to modify items placed in the shared folder.
Delete: Allows the user to delete items from the shared folder.

11) Define the default view settings for the shared folder. After the folder is created in their mailbox, users can modify their own view rights. (detailed descriptions below)
12) Optionally click **More Display Settings** and modify the settings to your preference.
13) Click **OK** and then click **Finish.**

Setting name is automatically selected.

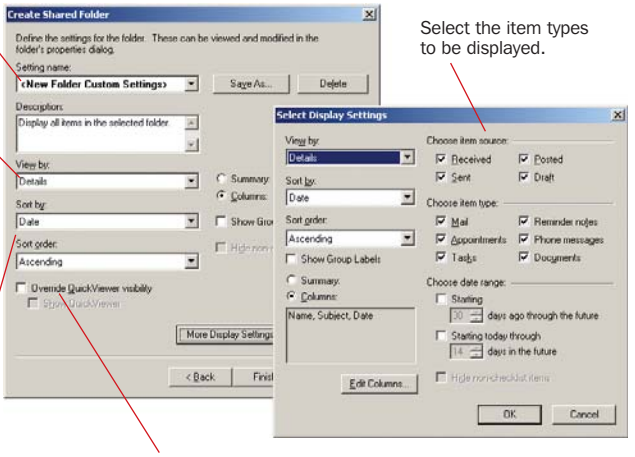
Select the desired **View by** setting:

Calendar – Folder contents are displayed in calendar format.

Checklist – Items are displayed in checklist format with checklist features enabled.

Discussion Thread – Items are sorted by topic and date.

Details – Standard items list display.



Select the item types to be displayed.

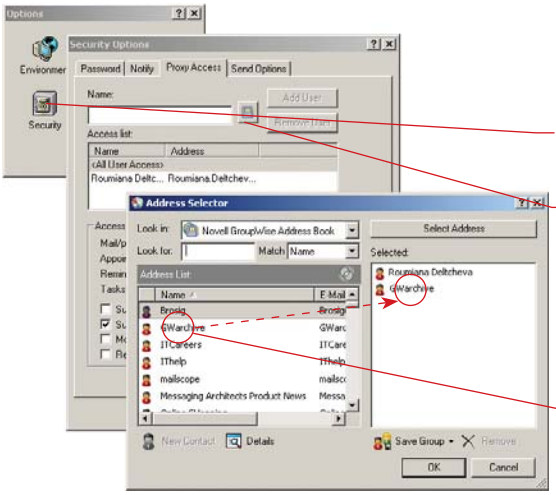
Define the criteria for sorting the Item list.

Turn Quick Viewer on or off.

GroupWise sends a **Shared Folder notification** to the recipients and automates the creation of the folder in their respective mailboxes.

Proxy

The **Proxy** feature authorizes access to a user's mailbox. Proxy access may be full or restricted to specific folders in the GroupWise account, such as the Mailbox, the Calendar, etc.

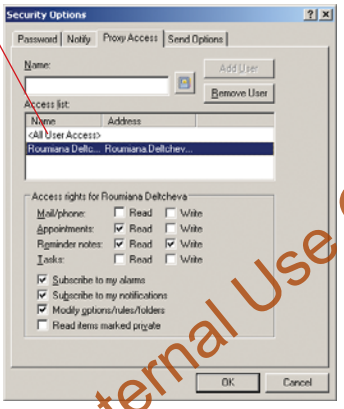


To grant proxy access to your GroupWise account:

1) From the **Menu bar**, select **Tools>Options**.
2) Double-click the **Security** icon and select the **Proxy Access** tab.
3) Click the icon and select the user(s) to whom you want to grant access.
4) Click the **Select Address** button.
5) Click **OK**.

You can also drag the user to the **Selected Field** and click **OK**.

Rights granted to the **All User Access** entry in the Access list will give the marked rights to all users in your GroupWise system. As a best practice, all items should be left unchecked.



6) Highlight each user in the list and grant the respective access rights to your **Mail, Appointments, Notes,** and **Tasks**.
7) Click **OK**.

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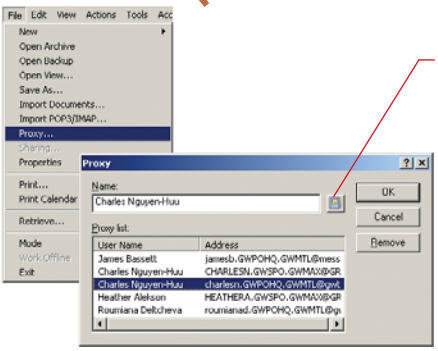
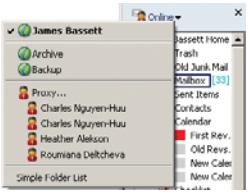
To access another user's GroupWise account:

1) From the **Main Menu Bar**, select **File>Proxy**.
2) Enter the name of the user or select the user from the address book



Enter the user's name or click the icon.

or

Click the **Folder List Header** drop-down list. Select the user in the list. If this is the first time you access a user's mailbox, click **Proxy** and enter the user's name.