

# *Lesson 7*

Objectives:

Upon completion of this lesson you will be able to:

- Automate GroupWise With Rules
- Create and Use Views
- Automate GroupWise Using the Shelf
- Create Macros
- Describe the GroupWise View Designer

## Automating Tasks With Rules

After using GroupWise for a while you will notice that you tend to perform the same tasks over and over. To prevent having to perform redundant tasks, rules can be created to handle a lot of these activities. Rules can allow you to automatically file incoming and outgoing phone messages in a phone folder, to automatically send a reply message regarding a particular subject matter, and a number of other activities.

A rule consists of four parts:

1. A rule name
2. A combination of events that activate the rule
3. Conditions that specify when the rule should be valid
4. Actions for the rule.

### Creating Rules

To create a rule, choose Rules... from the **Tools** menu. Choose Create... from the Rules dialog box.

The screenshot shows the 'Create Rule' dialog box with the following fields and options:

- Rule Name:** [Empty text box]
- When Event Is:**
  - Event: [New Item]
  - Incoming
  - Outgoing
  - Personal
- If Item Type Is:**
  - Mail
  - Appointment
  - Task
  - Note
  - Phone
  - Misc Values...
- If Item Contents Are:**
  - From: [Empty text box]
  - Subject: [Empty text box]
  - To: [Empty text box]
  - Message: [Empty text box]
  - CC: [Empty text box]
- Then Actions Are:**
  - [Large empty text box]
  - Add
  - Edit
  - Delete

Buttons on the right: Save, Cancel, Users..., Help.

Assign a rule name that will be easy to remember. In other words, use English to describe what the rule does.

Specify what event will activate the rule. For example, the event may be an a New Item, a folder being closed or opened, or startup. Next specify the type of item; incoming, outgoing or personal.

Next, specify the Item Type as mail, appointment, task, note or phone. Misc Values allows you to more specifically define the item type. You may only want a rule for items that have been opened.

If item contents are the same as in most dialog boxes you have looked at where search conditions can be specified. Any search character can be included.

Finally, indicate what actions the rule should do when the specified conditions are met.

Click on Save to save the rule.

The rule will appear in the Rules dialog box and will be enabled. You may choose to enable and disable rules. Enabled rules have a red check mark beside them. Rules can also be Run manually by clicking on Run in the Rules dialog box.

## GroupWise Views

A view is a window that can contain graphics, messages, attached files and even more.

Let's assume you periodically schedule a meeting with the same people, at the same location, and regarding the same subject. You can place this information in view file so that when you open the file, the **To:**, **Place:**, and **Subject:** text boxes are already filled in. You can then change any other information in the view before sending the item.

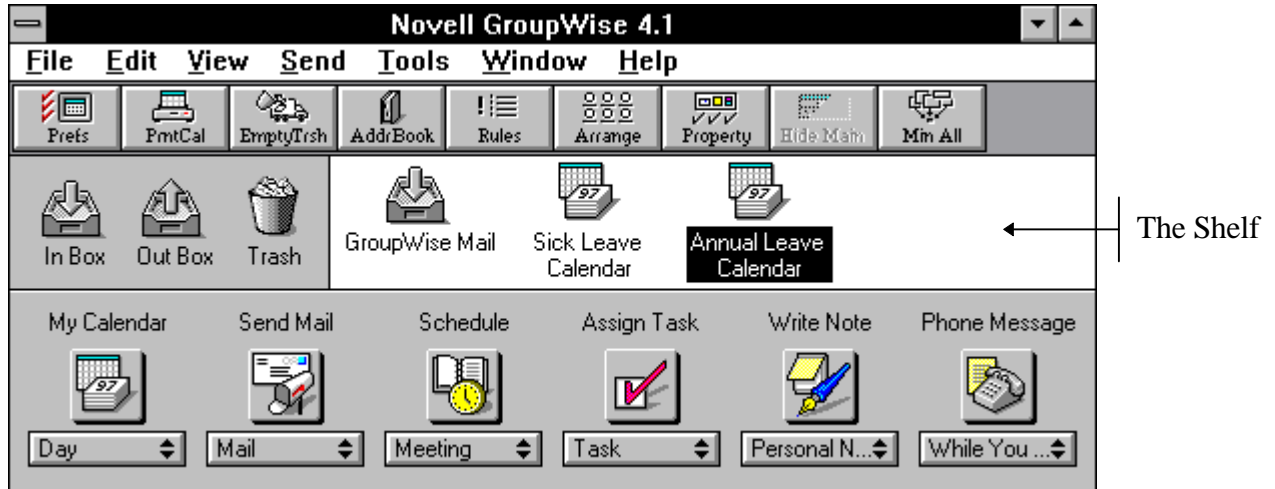
### Creating a Custom View

To create a custom view open any send view. Fill in the repetitive information and then choose Save View... from the **File** menu. Name the file and click on **OK**. The view file will have a .view extension.

### Opening a View

To open a view choose Open View... from the **File** menu and choose the view file you want to open. You may edit the view or add additional information before clicking on Send.

## The Shelf



The Shelf is the white area to the right of your In-Box, Out-Box and Trash icons in the main GroupWise window. Shelf icons can be placed on the shelf that will launch other applications, open filtered views, calendars, a view with a particular folder opened and much more. The shelf area may be enlarged by maximizing the main GroupWise window.

You are now familiar with calendars and scheduling. An excellent candidate for a shelf icon is a calendar view and in particular, a calendar that you proxy for. This will save you time by not having to open a calendar view and choose the proxy icon every time you want to proxy for someone else. By following the steps below you can place a calendar view icon on the shelf.

### Placing Calendars on the Shelf

Open the calendar view that you access most frequently. You will note a *title bar icon* in the upper left hand corner of the window. Arrange the calendar window and the main GroupWise window so that both the Shelf and the title bar icon are visible. Click and drag the calendar view title bar icon onto the shelf. If you would like to edit the description on the icon, choose Properties... from the **File** menu and edit the description in the Shelf Icon Properties dialog box.

### Placing a Filtered View on the Shelf

Most of the time you will be most interested in viewing the unopened items in your In-Box. Instead of having to filter the In-Box each time you open it, you can place a filtered view of your In-Box on the Shelf and only have to create the filter one time. Open your In-Box and click on the Filter icon on the button bar. Either create the filter or retrieve one you have previously created. Click and drag the title bar icon on the filtered In-Box to the Shelf. Since the description simply reads "In-Box", you will want to choose Properties from the **File** menu to edit the description on the icon.

### Opening Your In-Box, Out-Box or Calendar With Certain Folders Selected

Typically, when you open either your In or Out Box, the root folder is selected. When you open your calendar all folders are highlighted. What if you have created a folder for a project that you

are continuously accessing? How can you create a shelf icon to open your In-Box and the project folder? Once again, open your In-Box and select the project folder. If you need to select multiple folders, you can select one and hold down your **CTRL** key to select additional folders. Click and drag the title bar icon to the Shelf. Once again, change the description by editing the Shelf icon properties. If you desire, you may also change the icon on the shelf. The Properties options are similar to program item icon properties in Windows.

## Creating a Startup View

You can open a single view or several views at one time if you wish. To create a shelf icon for several views, choose a shelf icon on the Shelf to be included in startup. Click and drag subsequent views on top of this icon. This will create a shelf icon tied to more than one view. The views can be seen by looking at the properties for the icon. Change the description on the file to Startup. This will execute all the views associated with the icon on startup.

## Placing Executable Files on the Shelf

If you wish, you may place third-party application icons on the Shelf. This can be helpful if you need to use a particular word processing package or a custom package in conjunction with GroupWise. One way to place an icon on the Shelf is to open File Manager and click and drag.

## Creating Macros

Novell GroupWise does have a macro recorder, for saving repeated keystrokes as commands to a .wcm file. The macros can be recorded and played from the **Tools** menu or can be added as a button to the button bar.

## Customizing Button Bars



In some instances, the button bar may be edited through the **View** menu choice Button Bar Preferences. Care must be taken not to edit the button bar for everyone in your office.

## View Designer



One other feature of GroupWise is the GroupWise View Designer program. The Designer enables you to create a custom view for the five different types of messaging items in GroupWise. You can incorporate company logos and graphics and arrange elements on the screen to best meet your needs. Double-click on the GroupWise View Designer icon to launch the application. The Designer can be used to edit an existing view or create new ones. Let's go through the necessary steps to create a new view for telephone messages.

Select Create Phone View from the **File** menu. Choose the envelope icon to add a **From:** box to the view. Click and drag to create the box in the view. The icon to the right of the address box tool will create a message box. You will also want to add some check boxes for choices like "Please Return Call" and so forth. Finally, you may want to add a drop down list so you

may choose send options, such as, priority and security labels. Save the view from the **File** menu. The view can be added to the Shelf by opening the view from the **File** menu and dragging the title bar icon to the Shelf.

## Exercises

### Creating a Rule

1. Create a rule that will place incoming mail items from your GroupWise instructor into an “Instruct” folder automatically.
2. First, create the folder. Remember, access your In-Box and click on the Folders icon on the button bar. Create a folder off of your root folder named “Instruct”.
3. Next, choose Rules from the **Tools** menu.
4. Select Create....
5. Fill in the appropriate choices.

The screenshot shows the "Create Rule" dialog box with the following configuration:

- Rule Name:** Instructor Mail
- When Event Is:** Event: New Item (dropdown), Incoming (selected radio button), Outgoing (radio button), Personal (radio button)
- If Item Type Is:** Mail (checked checkbox), Appointment (checkbox), Task (checkbox), Note (checkbox), Phone (checkbox), Misc Values... (button)
- If Item Contents Are:** From: Instruct (text field), Subject: (text field), To: (text field), Message: (text field), CC: (text field)
- Then Actions Are:** Move To Folder: Instruct (selected in list), Add (button), Edit (button), Delete (button)

6. Click on Save to save the rule.
7. The rule will take effect from this point forward. To place any prior instructor mail in the new folder, choose the rule and click on Run.
8. Finally, choose Close to close the Rules dialog box.

### Placing Calendars on the Shelf

You will place two calendars on the Shelf in this exercise. One will be the Events calendar and the other is the calendar for the classmate that you set up to Proxy in a prior lesson.

1. Choose Proxy from the **File** menu in the main GroupWise window.
2. Select Users to access the Address Book.
3. Click on Resources since the Events calendar is a resource.
4. Double-click on the Events calendar and then on **OK** to exit the Proxy dialog box.
5. The main window title bar will indicate that you are viewing the Events calendar.
6. Choose one of the calendar views.
7. To place the icon on the Shelf click and drag the title bar icon onto the shelf.
8. Close the calendar view and reopen it from the Shelf.
9. Return to your own mailbox by choosing Proxy again from the **File** menu.
10. Choose your own name by double-clicking on it.

Repeat the above steps to place the calendar for your classmate on the Shelf that you were given access rights to in a previous exercise.

### **Combining View on the Shelf**

Suppose you would like to create a view that will open both your In and Out boxes.

1. First, open both boxes and position them on the screen the way you want to save them.
2. Click and drag one of the box title bar icons to the Shelf.
3. Next, click and drag the other title bar icon to the Shelf and place it on top of the other one.
4. Close both boxes.
5. Click on the icon and choose Properties from the **File** menu. You will notice that two views are listed in the Content List.
6. Change the caption to read Startup.
7. Exit Novell GroupWise and start it again.

Both boxes will be opened upon startup because the caption reads “Startup”.

### **Creating and Saving a View to the Shelf**

Your job is to send the Minutes of the weekly staff meeting to the group. This means every Thursday you have to create the same Mail message with the same **To:** and **Subject:** text.

1. Open a send mail view and fill in the appropriate **To:** and **Subject:** boxes.
2. Choose Save View... from the Mail To: window.
3. Save the .view file to your local hard drive as Minutes.view and click on **OK**.
4. Cancel the Mail message.
5. To place the view on the Shelf select Open View... from the **File** menu of the main GroupWise window.

6. Choose the Minutes view by double-clicking on it.