

# FINE PRINT

BY BRAINSTORMINC.COM

PHOTOGRAPH BY FREDRIK BRODEN

## EXTEND THE POWER OF GROUPWISE...AUTOMATICALLY

### Tip 1: Easy Archives

**SCENARIO:** You and your users are getting more e-mails every day and it's getting harder to efficiently organize and manage them. You can simply delete many of these messages, but you need to keep some of them indefinitely. GroupWise can automatically archive or delete items based on their type and age, which works well if your users want to archive or delete everything of a certain type after it's so many days old. However, most of your users receive items that aren't that important, at least not important enough to keep them indefinitely. Therefore, you may want to give them a way to easily drag and drop items into the archive—allowing them to determine which items are important enough to keep.

**NEED:** Users want to easily archive important items so they can keep them indefinitely.

**SOLUTION:** This need is satisfied using one of the most powerful features in GroupWise—Rules. Part 1 explains how to create a folder that your rule can monitor and part 2 explains how to create the rule to automate the archiving. Once the folder and rule are created, just drag and drop important items into the new folder and GroupWise will automatically archive them.

#### Part 1

- 1 From the menu bar click **File** and choose **New** and then **Folder**.
- 2 Choose **Personal Folder** and click **Next**.
- 3 Type in a name for your folder (e.g., **Send to Archive**).
- 4 Position the folder where you want it in the folder list and enter a description if you want. Click **Next** and then click **Finish**.

#### Part 2

- 1 From the menu bar click **Tools** and choose **Rules** and then click the **New...** button.
- 2 Name your rule (e.g., **Send to Archive**).
- 3 Change **When event is** to **Close Folder**. (See *Customizations* for other triggers.)
- 4 Change the **Select folder** box to list your new folder by clicking the folder icon on the right and selecting the new folder from the list.
- 5 The **If conditions are** section should display **Act on all items** by default.
- 6 Under the **Then actions are** section click on **Add Action** and choose **Archive** from the dropdown list. (See Figure 1.)
- 7 Click **Save** and then **Close**.

**CUSTOMIZATIONS:** In Part 2, Step 3 you may choose a different trigger. This option determines when the items are actually archived.

**Close Folder** moves the items to the archive when you navigate away from the folder to another folder. This lets you verify that the items in the folder should be archived. If there is anything in the folder that you don't want archived, just drag and drop it to a different location before you navigate away from the folder.

**Open Folder** moves the items to the archive as soon as you select the folder.

**IN PRACTICE:** You may find it useful to create a personal folder named "Archive" with subfolders with unique names, e.g., "[Project Name]" for each project you are working on. Then, create a rule for each subfolder choosing the appropriate subfolder in Part 2, Step 4 for each rule. By doing this, when you open your archives all of your items will already be organized according to your folder structure.

The New Rule dialog enables you to define the events and conditions that will trigger the rule. You also define the actions that will occur when the rule is run.

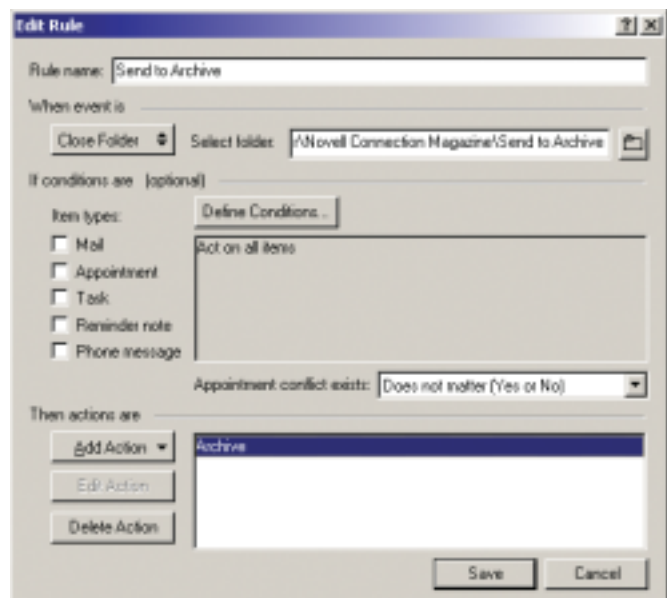


FIGURE 1



## Tip 2: Forms and Files Auto-Responder

**SCENARIO:** Many organizations have forms or files that need to be dispersed to employees, clients or the public upon request.

This is often done manually. In other words, someone receives a request e-mail and manually replies and attaches the requested form or file. You would save time if you let GroupWise complete this task automatically.

**NEED:** You want GroupWise to automatically send forms or files to anyone that requests them via e-mail.

**SOLUTION:** Once again, the Rules feature comes to the rescue. In Part 1, we'll look at the requesting side of the solution; in Part 2, you will create the rule that does the work for you in GroupWise.

### Part 1

To request the form, someone sends you an e-mail with a subject that GroupWise can easily recognize so the rule can do its job—reply with an attached form or file. An easy way to do this is to create a link on a Web page (Internet or Intranet, depending on who needs to receive the form or file) that an individual can click to initiate the request. The following link opens the user's default e-mail client (which means the request will be coming from their e-mail address) and embeds the subject of the message whenever someone clicks the link.

<mailto:forms@yourdomain.com?Subject=Requesting Form 1>

Let's break it down for further explanation:

**mailto:** instructs the Web browser to open a new message using the default e-mail client software.

**forms@yourdomain.com** is the address where the message will be sent. Replace this address with the one you want to use in your organization. This is the account for which you will be setting up the rule in Part 2.

**?Subject=Requesting Form 1** embeds the subject in the email.

The text following the **?Subject=** is what GroupWise will recognize and use to trigger the rule to reply with the form or file.

### Part 2

Use the same GroupWise account that was used in Part 1 to take the following steps:

- 1 From the menu bar click **Tools** then choose **Rules** and then click the **New...** button.
- 2 Name your rule (e.g., **Form 1 Auto-Responder**).
- 3 Under **When event is**, choose **New Item** and make sure that there is a checkmark in **Received**.
- 4 Under **If conditions are** place a checkmark in **Mail** and click on **Define Conditions**.
- 5 Now choose **Subject** in the first drop box and **= Matches** in the delimiter box.
- 6 Type in the following text box exactly what is in the mailto link after **?Subject=** (in the example, it was **Requesting Form 1** and click **OK**.
- 7 Click on **Add Action** then **Reply...** and then click **OK**.
- 8 In the **Files:** field, type the path to where the form or file is saved. (Hint: If you don't trust yourself to get the path correct, just type any letter in the field click **OK** and GroupWise will prompt you to **Browse** to select the file. See Figure 2.)
- 9 In the **Message:** field, type any message that you would like the recipient to receive along with the attached form or file and click **OK**. (See Figure 3.)
- 10 If in Step 8, you typed the complete path to the form or file correctly, skip to Step 12, otherwise, click the folder icon at the right of the **File name:** field.
- 11 Browse to the form or file and click **Open** and then click **OK**.
- 12 Optional – You can tell GroupWise to stop processing rules by

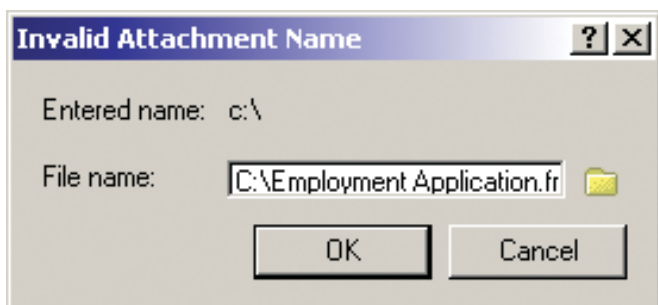


FIGURE 2



FIGURE 3

clicking **Add Action** and then **Stop Rule Processing**. (See Figure 4.) This stops it from running through the rest of the rules in the account.

13 Click **Save** and then **Close**.

**TESTING:** To test your new rule and link, from a different GroupWise account, go to the Web page where the link is embedded and click it. Your default e-mail client should open a blank e-mail that is already properly addressed and with the subject line already populated. Now send the message. When GroupWise receives the e-mail, it recognizes the subject and automatically responds with the proper form or file attached.

**IN PRACTICE:** Typically, if you have one form or file to send, you probably have many more. It's very useful to list each of the forms or files that you have available to the same group of people on a single Web page, making this the one place

where all forms or files are easily accessible to all users. Yes, you can make all the forms and files available directly on the Web site, but the advantage of using this method is you can track who has requested and received each form or file by viewing the sent items in the GroupWise account that is handling the auto-response.

Following is a perfect example of how to incorporate this functionality in your own helpdesk organization. The majority of your time is spent resolving common issues amongst your end users. You and your staff manually field most of these common problems, but many could be resolved by the end users if they had the proper information. Consider setting up some GroupWise rules to autorespond to your end users' common queries and automatically attaching appropriate diagrams or information. In addition, you can type text in the message box that can explain steps to resolve their problem.

www.  
portlock.  
com

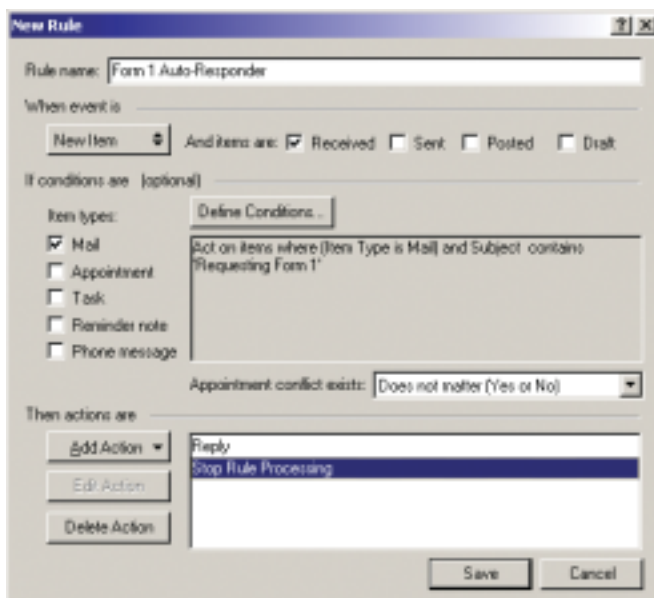


FIGURE 4

BrainStorm, Inc.® is a Novell Authorized End-User Training Partner and has spent countless hours developing tools and services to ensure your end users are fully utilizing the Novell tools you have implemented within your organization. If you would like more information, please contact BrainStorm at 801.229.1337 or visit them at [www.BrainStormInc.com](http://www.BrainStormInc.com).

## Tip 3: Auto Filing Rule

**SCENARIO:** Have your users ever requested a way in which all items (once read or viewed) from their supervisor could automatically be filed in a folder? This way they always know exactly where those messages are stored.

**NEED:** You want to have all messages from the supervisor that you have read to be filed in a particular folder without requiring you to do anything.

**SOLUTION:** Obviously, Rules can help you solve this problem. Part 1 explains how to create a folder in which all the messages from the supervisor will be filed. Then Part 2 explains how to create the rule that will do the filing work for you.

### Part 1

1. Click **File** and then **New** and then choose **Folder**.
2. Specify **Personal Folder** and click **Next**.
3. Type in a name for your folder (e.g., **Items from my supervisor**).
4. Position the folder where you want it within the folder list and click **Next** and then click **Finish**.

### Part 2

1. Again, from the main menu bar click **Tools** and then choose **Rules** and click the **New...** button.
2. Name your rule (e.g., **Move items from my supervisor**).
3. Change **When event is** to **Exit** (See *Customizations* below for other triggers) and ensure that there is a checkmark in **Received**.
4. Under **If conditions are** place a checkmark in **Mail** (and **Phone** if desired, but don't mark **Calendar** items) and click on **Define Conditions**.

5. Choose **From** in the first drop box and  **Contains** as the delimiter. Then type the supervisor's name as it appears on messages in the next field.
6. Click on **End** and change it to **And**.
7. Choose **Item Status** in the new drop down box and  **Contains** as the delimiter again. Then choose **Opened** for the final field and click **OK**. (See Figure 5.)
8. Now click **Add Action** and then **Move to Folder...** and place a checkmark in the box next to the folder that you created in Part 1. Then click **Move**.
9. Click **Save** and then **Close**.

**CUSTOMIZATIONS:** In Part 2, Step 3, you can specify to have the items moved as soon as they are received. Do this by changing **When event is** to **New Item**. If you choose this option, be sure to omit Steps 7 and 8. You can also modify this rule to file items about a project. To do this, choose **Subject** or **Message** and enter key words about the project in Step 6.

**IN PRACTICE:** Whenever you close GroupWise, whether at the end of the day or any other time, this rule will execute. In other words, all the items that you have opened from the supervisor will be automatically moved to the supervisor's folder. **N**



FIGURE 5