

# Learning Calendar Functions

## Group Wise 7



### Content Overview:

- Scheduling Appointments
- Sending Tasks
- Sending Reminder Notes

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# Learning Calendar Functions in Group Wise 7

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# Learning Calendar Functions

You can schedule appointments, tasks, and reminder notes for yourself and other users, whether the event happens once or on a recurring basis. You can also reserve a block of time with a posted appointment.


## Scheduling appointments

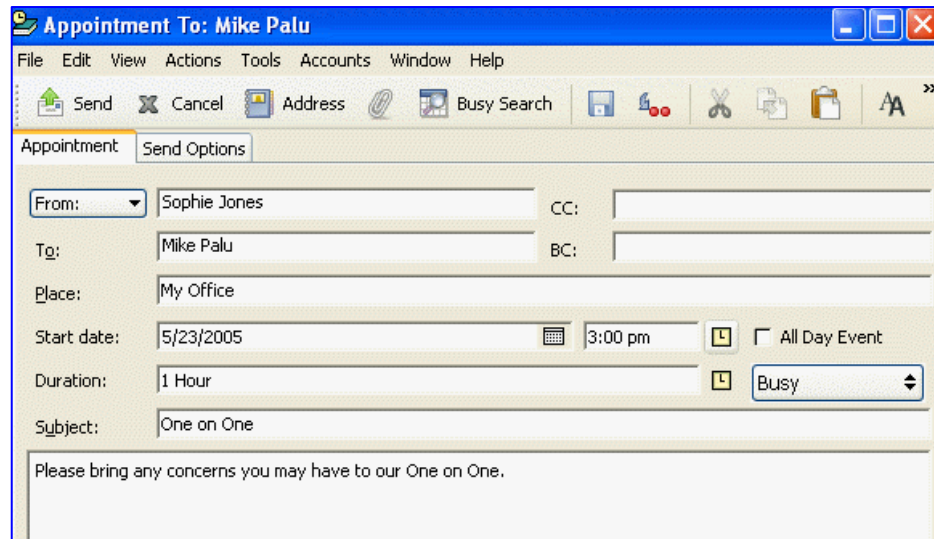
### Scheduling an Appointment for Other Users

1. Click  on the toolbar.
2. In the **To** field, type a username, then press Enter. Repeat for additional users. In addition, include any resource IDs (such as conference rooms) in the **To** field. If necessary, type usernames in the **CC** and **BC** fields.
3. To select usernames or resources from a list, click **Address** on the toolbar, double-click each user, then click **OK**.

4. To change the **From** name (to another account or proxy), click **From:**, then click a name.

5. Type the place description in the **Place** field. Specify the start date.

6. Click  to specify a date or auto-date for your appointment or Select **All Day Event** for an all day event.



7. Specify a start time and duration. Duration can be in minutes, hours, or days.
8. Specify how you want the appointment to appear as. Appointments can appear as **Free**, **Tentative**, **Busy**, or **Out of the Office**.
9. Type a subject and message.
10. If you want to make sure the people and resources for the appointment are available, you can do a busy search by clicking **Busy Search** on the toolbar.

You can specify many options, such as making this appointment a high priority, requesting a reply from recipients, and more, by clicking the **Send Options** tab.

11. Click **Send** on the toolbar.

## Rescheduling an Appointment

If you want to make sure the people and resources for the appointment are available, you can do a busy search by clicking **Busy Search** on the toolbar.

1. Click the **Sent Items** folder in the Folder List.
2. Click the appointment to reschedule.
3. Click **Actions > Resend**.
4. If the original appointment was an auto-date appointment, click **This Instance** or **All Instances**.
5. Make your changes, then click **Send** on the toolbar.
6. Click **Yes** to retract the original item.
7. To reschedule an appointment for a new time on the same day, open your Calendar and drag the appointment to the new time.

## Rescheduling Recurring Appointments

1. Click the **Sent Item** folder in the Folder List.
2. Click the appointment you want to reschedule.
3. If you are rescheduling just one appointment in a series of recurring appointments, select the appointment on the day you want to reschedule.
4. Click **Actions > Resend**.
5. Click **All Instances** for all appointments in the recurring appointment. or Click **This Instance** for only one appointment in the series of recurring appointments.
6. Make your changes, then click **Send** on the toolbar.
7. Click **Yes** to retract the original item.
8. To reschedule an appointment for a new time on the same day, open your Calendar and drag the appointment to the new time.

## Canceling an Appointment

You can cancel an appointment if you scheduled it or if you have the necessary Proxy rights to the scheduler's Mailbox.

1. Click the **Sent Items** folder in the Folder List.
2. Click the appointment you want to cancel.
3. Click **Edit**, then click **Delete**.
4. If the original appointment was an auto-date appointment, click **This Instance** or **All Instances**.
5. Click **All Mailboxes**, then click **OK**.


## Scheduling an Appointment for Yourself

If you are not available for meetings, schedule a posted appointment for those times. When another user includes you in an appointment and does a busy search, the user can see you are not available at those times, but can still schedule over your appointment.

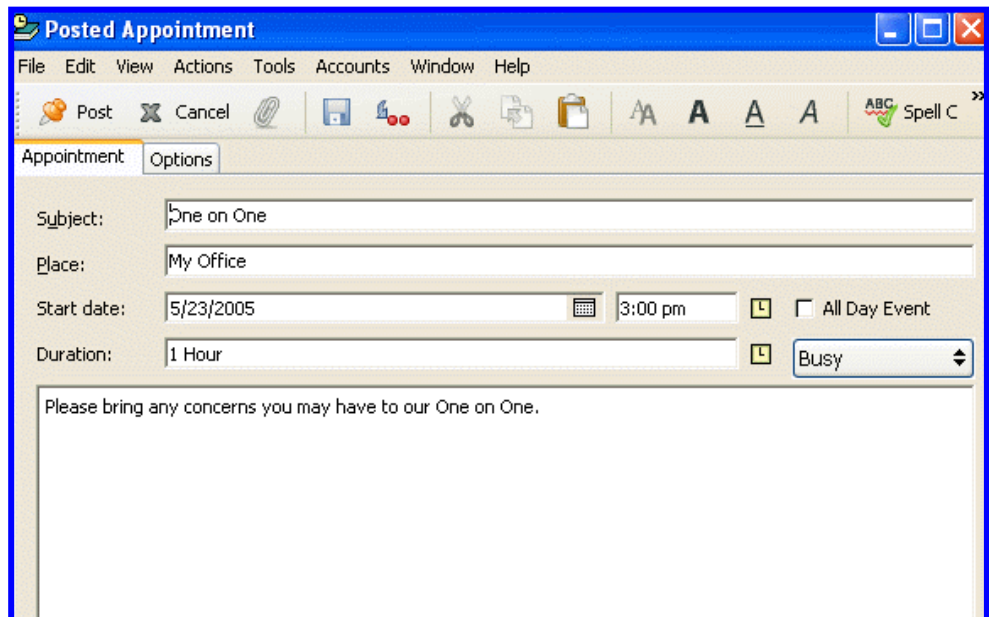
**Note:** Posted appointments are placed in your Calendar on the date you specify. They are not placed in your Mailbox or in any other user's Mailbox.

1. On the toolbar, click the arrow on the  button, and then click **Posted Appointment**.

In your Calendar, open a view with an Appointments List, click a date, and then double-click a time in the Appointments List.

2. (Optional) Type a subject and a place if necessary.
3. Specify the start date. Or Click  to specify a date or auto-date for your appointment. Or Select **All Day Event** for an all day event.
4. Specify a start time and duration. Duration can be in minutes, hours, or days.
5. Specify how you want the appointment to appear as. Appointments can appear as **Free**, **Tentative**, **Busy**, or **Out of the Office**.
6. (Optional) Type a message. You can specify many options, such as making this appointment a high priority and more, by clicking the Options tab.
7. (Optional) Specify a Show Appointment As type by clicking **Actions > Show Appointment As**, then clicking a type.

8. Click **Post** on the toolbar. Posted appointments are placed in your Calendar on the date you specified. They are not placed in your Mailbox or in any other user's Mailbox.





## Checking When Everyone Is Available

Use **Busy Search** to find a time when all the people and resources you want to schedule for a meeting are available.

### Performing a Busy Search

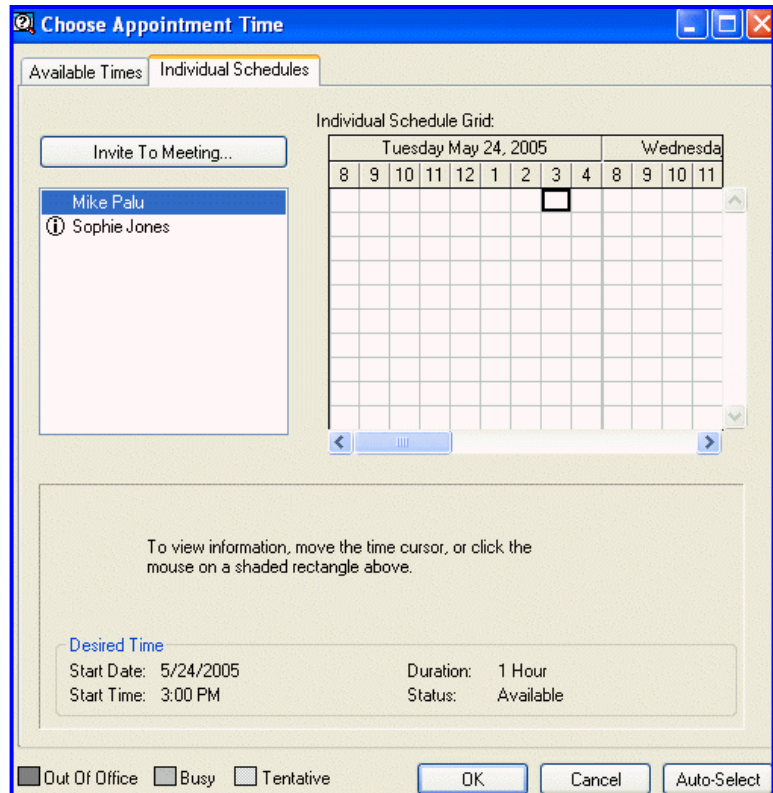
1. In an appointment you are creating, specify usernames and resource IDs in the **To** field.
2. Specify the first possible day for the meeting in the **Start Date** field.
3. Specify the meeting's duration.
4. Click **Busy Search** on the toolbar.

The legend at the bottom of the Busy Search dialog box shows the meaning of the various Show Appointment As patterns on the grid.

If  appears to the left of the username or resource, you can click a scheduled time across from the username or resource on the Individual Schedules tab to display more information about the appointment in the box below. However, the user or resource owner must give you appointment Read rights in their Access List before the  icon appears.

To exclude a username or resource from the search without deleting it, click the Available Times tab, then click the check box next to the user or resource to deselect it. Excluding a person or resource from the search is useful if a user (like a CC recipient) should be invited to a meeting but does not necessarily need to attend. To include a user or resource name that has been excluded, click the check box next to the user or resource to select it.

5. Click **Auto-Select** to select the first available meeting time, then click **OK** to transfer the users, resources, and selected time and duration back to the appointment you were scheduling. Or click **Auto-Select** until the time you want is displayed, then click **OK** to transfer the users, resources, and selected time and duration back to the appointment you were scheduling. Or click the **Available Times** tab to see possible meeting times, click a time to select it, then click **OK** to transfer the users, resources, and selected time and duration back to the appointment you were scheduling.
6. To remove a user or resource from the **Invite to Meeting** list after the search, click the **Available Times** tab, click the username or resource to remove, press **Delete**, then click **Yes**.
7. This is useful if you want to include several conference rooms in the search to find one that is available, then eliminate those you do not want.
8. Complete and send the appointment. If you want to do a busy search before creating an appointment, click **Tools > Busy Search**. Specify information in the Busy Search dialog box, then click **OK** to perform a busy search. When you find a time you want for a meeting, click **Request Meeting** to transfer the information to a new appointment view, then complete the appointment.



9. You can change the search range for one appointment by scheduling the appointment with **Tools > Busy Search** and changing the number in the **Number of days to search** field.

## Changing Busy Search Options

You can change the search range, time, and days default for all appointments on the Busy Search tab in Date Time Options.

1. Click **Tools > Options**, double-click **Date & Time**, then click the **Busy Search** tab.
2. Change the options you want.
3. Click **OK**.

## Formatting Your Appointments in Mac iCal

1. Click **Accounts > Account Options**.
2. Click **General Options**.
3. Select **Use iCal when sending appointments via SMTP**.
4. Click **OK**.

If the recipients of your appointment use messaging and calendaring software that supports iCal, they receive an appointment item. If their messaging and calendaring software does not support iCal, they receive a mail item with the appointment information added to the message text.

## Sending Tasks

A task is an item to be completed by a specified date and time that displays on the Calendar. When you assign a task to a user, the user can accept or decline the task, but until it is declined or completed, the task appears on the user's Tasks List and on the user's Calendar each day.

After it is accepted, a task appears on the Calendar on its start date. When the due date is past, the task displays in red on the Calendar. When you mark a task Completed, it no longer carries over to the next day on your Calendar.

After you finish a task, you can mark it Completed. As the originator of an assigned task, you can have GroupWise send you notification when the task is marked Completed. (You must have Notify running to receive notification). A Completed status, including the date and time the task was marked Completed, is placed in the Properties window.


**TIP:** You can also create a checklist that is not associated with your Calendar. In this type of checklist, any item type (mail, appointment, task, reminder note, phone message) can be used.

## Assigning a Task to Other Users

1. Click **File > New > Task**.

2. In the **To** field, type a username, then press Enter. Repeat for additional users. If necessary, type usernames in the **CC** and **BC** fields. Or to select usernames from a list, click **Address**, double-click each user, then click **OK**.

3. To change the **From** name (to another account or proxy), click **From:**, then click a name.

4. Type the date you want the task to begin and the date you want the task to be completed. You can type the same date in both fields. Or click  to specify dates or auto-dates for your task.

5. Type the subject.

6. Type a priority for the task.

The task priority can consist of a character followed by a number. The following are acceptable formats: A1, C2, B, 3, and so forth. Task priorities are optional.

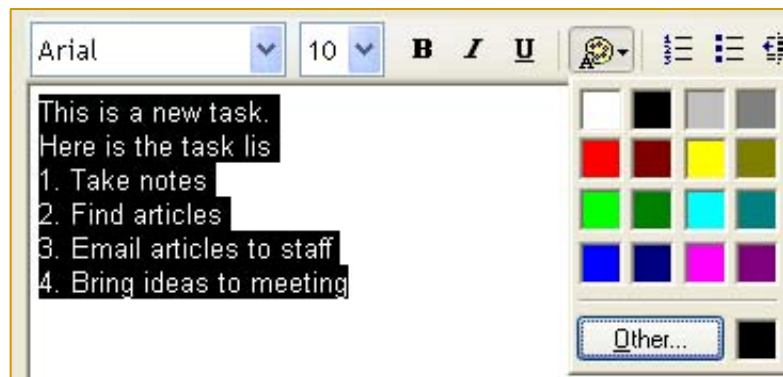
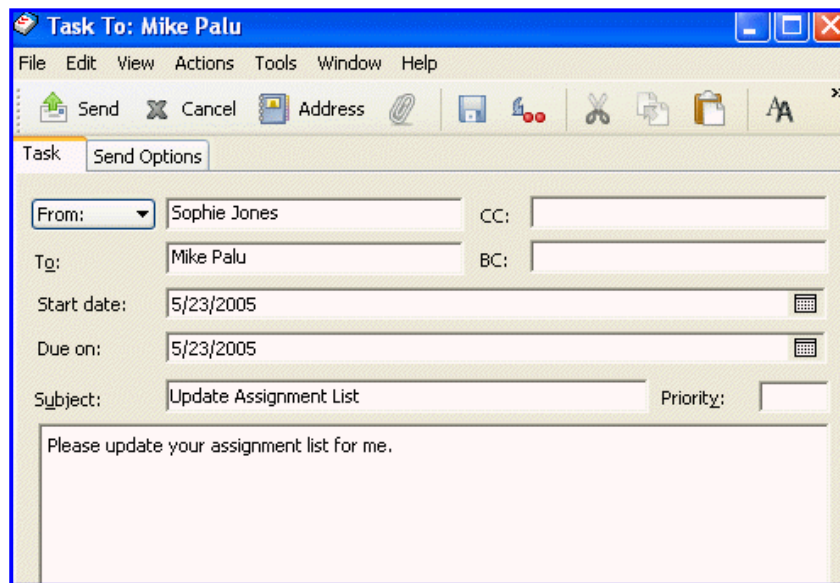
7. Type a description of the task.

You can specify many options, such as making this task a high priority, requesting a reply from recipients, and more, by clicking the **Send Options** tab.

If you want, change the font of the message text:

Select the text you wish to change and click the icons for the color palette, the font style, the font size, bold, underline, italic, bulleted list, or numbered list to style the text as desired.

8. Click **Send** on the toolbar.




## Assigning a Task to Yourself

1. In your Calendar, open a view with a Tasks List (for example, the Day view), click a date, then double click an empty space in the Tasks List.

2. Type a subject.

3. Type a priority for the task.

The task priority can consist of a character followed by a number. The following are acceptable formats: A1, C1, B, 3, and so forth. Task priorities are optional.

4. Type the date you want the task to begin and the date you want the task to be completed. You can type the same date in both boxes. Or if necessary, click  to specify dates or auto-dates for your task.

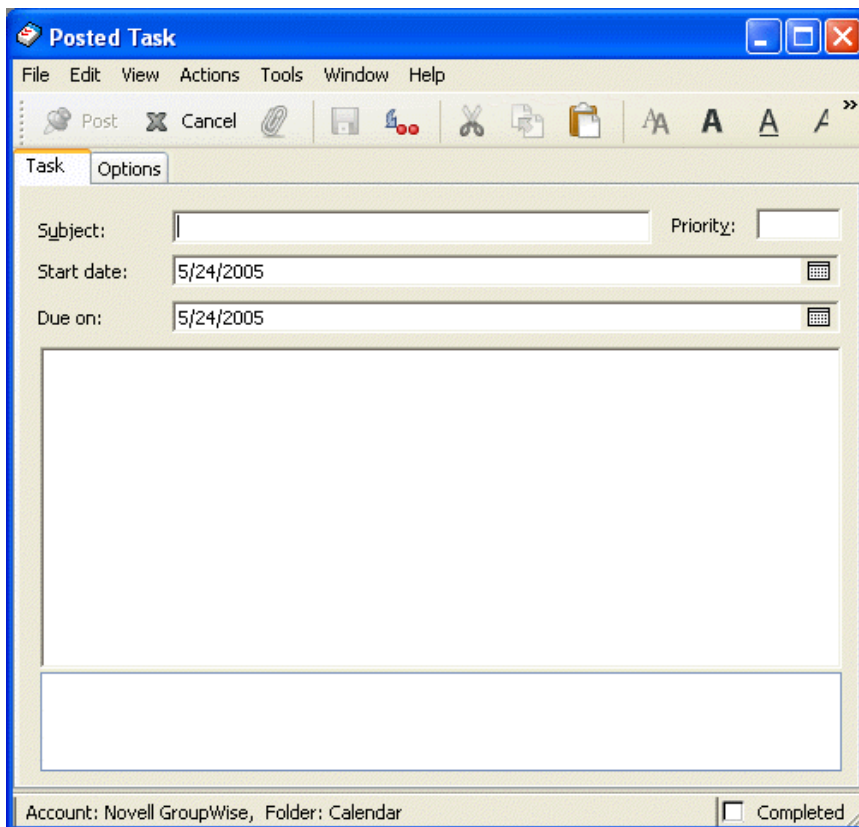
5. Type a message.

You can specify many options, such as making this task a high priority and more, by clicking the **Options** tab.

6. Click **Post** on the toolbar.

Posted tasks are placed in your Calendar. They are not placed in your Mailbox, or in any other user's Mailbox.

**TIP:** You can also create a checklist that is not associated with your Calendar. In this type of checklist, any item type (mail, appointment, task, reminder note, phone message) can be used.



## Marking Tasks Completed

When you finish a task, you can mark it Completed. Tasks you mark Completed are not carried over to the next day on your Calendar. Completed tasks are distinguished by a check mark in your Calendar. Overdue tasks display in red.

If you mark a task Completed, then realize you left some part of it incomplete, you can unmark it. Unmarked tasks display on the current day in your Calendar.

When you mark a task Completed, GroupWise sends notification to the originator of the task if he or she selected return notification in Send Options. A Completed status, including the date and time the task was marked Completed, is placed in the originator's Properties window.

This section contains the following topics:

### Marking a Task Completed

1. Click the **Calendar** icon on the Nav Bar.
2. With the task pane displayed, select the check box next to the task.  
To unmark a task that has been marked Completed, deselect the marked check box next to the task.

### Checking the Completion Status of a Task

1. Click the **Sent Items** folder in the Nav Bar.
2. Open the task you want to check.
3. Click the **Properties** tab.


### Sending Reminder Notes

Reminder notes are like mail messages except they are scheduled for a particular day and appear on the Calendar for that date. You can use reminder notes to show vacations, holidays, pay days, birthdays, and so forth.

This section contains the following topics:

## Scheduling a Reminder Note for Yourself

Posted reminder notes are placed in your Calendar on the date you specify. They are not placed in your Mailbox or in any other user's Mailbox.


1. From your Calendar, open a view with a Reminder Notes List (for example, the Week view).
2. Click a date, then double-click an empty space in the Reminder Notes List.
3. If necessary, click  to specify a start date or auto-date for your reminder note.
4. Type a subject and the reminder note.

You can specify many options, such as making this reminder note a high priority and more, by clicking the **Options** tab.

5. Click **Post** on the toolbar.

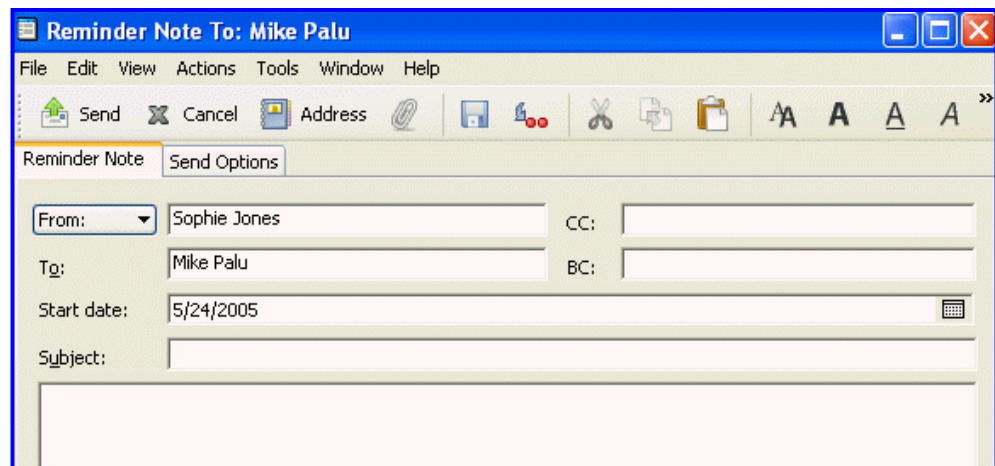
To access the information later, open your Calendar and select the date the information appears on. Double-click the reminder note in the Reminder Notes List.

## Scheduling a Reminder Note for Other Users

1. Click **File > New > Reminder Note**.
2. In the **To** field, type a username, then press **Enter**. Repeat for additional users. If necessary, type usernames in the **CC** and **BC** fields. Or To select usernames from a list, click **Address** on the toolbar, double-click each user, then click **OK**.
3. To change the **From** name (to another account or proxy), click , then click a name.
4. Type a subject (optional) and the reminder note message. If you want, change the font of the message text.
5. In the **Start Date** field, type the date this reminder note should appear in the recipients' Calendars. Or click  to specify a start date or auto-date for your reminder note.

You can specify many options, such as making this reminder note a high priority, requesting a reply from recipients, and more, by clicking the **Send Options** tab.

6. Click **Send** on the toolbar.



## Accepting or Declining Scheduled Items

When you receive an appointment, task, or reminder note, you might not be able to accept. In GroupWise, you can let the sender know if you accept or decline, specify a level of acceptance or availability, and add additional comments. You can also delegate the item to another user. The sender can find your response by checking the item's Properties.

1. Open the appointment, task, or reminder note.
2. Click **Accept** or **Decline** on the toolbar. Or click the down-arrow to the right of the button to Accept level of availability, or to select **Decline with Options**.
3. If you selected **Decline with Options**, you can type a comment (optional), then click **OK**.

By default, the sender can view your comment by viewing the item properties in the Sent Items folder. However, for more noticeable notification when someone declines an item, the sender has the option under **Tools > Options > Send > Appointment/Task/Reminder Note** to set **Return Notification When Declined to Mail Receipt, Notify**, or both.

4. If the item is an Auto-Date item, click **This Instance** to accept or decline this one Auto-Date item, or click **All Instances** to accept or decline all instances of the Auto-Date item.

## Accepting or Declining Resource Requests

You can accept or decline resource requests only if you are the resource owner and have been granted Read and Write rights.

1. In the Main Window or Calendar, click **File > Proxy**. Or

Click the folder list header drop-down list (above the Folder List; it probably displays Online or Caching to indicate what mode of GroupWise you are running in).

2. Click the resource you own.

If the resource you own isn't listed, click **Proxy**, type the name of the resource you own in the **Name** field, then click **OK**.

3. Double-click the item you need to accept or decline.
4. Click **Accept** or **Decline** on the toolbar.

## Accepting or Declining Internet Items

You can accept or decline appointments, all day events, and tasks that are sent from Internet-enabled collaboration clients. Some of these clients include Microsoft Exchange, Lotus Notes, and Macintosh iCal.

1. Open the appointment, task, or reminder note.
2. Click **Accept** or **Decline** on the toolbar. Or click the down-arrow to the right of the button to select an **Accept** level of availability, or to select **Decline with Options**.
3. (Optional) If you selected **Decline with Options**, you can type a comment, then click **OK**.
4. If the item is an Auto-Date item, click **This Instance** to accept or decline this single Auto-Date item, or click **All Instances** to accept or decline all instances of the Auto-Date item.

By default, a message is sent back to the sender of the item, indicating the action you took.

In addition, you can right-click the Internet item and select Import Calendar. This creates a new calendar and imports the item to the new calendar.

## Specifying a Time Zone for an Appointment

The Time Zone feature lets you schedule a meeting for recipients in different time zones who will be meeting in a single location.

Normally, GroupWise automatically adjusts meeting times based on the recipients' time zones. For example, a meeting scheduled by a user in Utah for 10:00 would be displayed as 9:00 for a recipient in California and as 12:00 for a user in New York because these users are in different time zones. Because GroupWise adjusts the time, all the users scheduled for a conference call would call in at the same moment, even though their local time might differ.

Use the Time Zone feature if you don't want GroupWise to adjust to the recipients' local time zone. For example, if you are in the Saskatchewan time zone and include users from the Mountain Time (US & Canada) time zone in your appointment, you would use the Time Zone feature if these users are flying to Saskatchewan for the appointment. Time Zone ensures that the appointment in their Calendars and Mailboxes shows the correct Saskatchewan time.

1. Open and create a new appointment.
2. Click **Actions > Select Time Zone**, click the **Time Zone** drop-down list and select the time zone for the appointment location, then click **OK**.
3. Click **Send** on the toolbar.



When the users you have scheduled with the Time Zone feature receive the appointment, they see a time annotation after the subject when they see the appointment in their Mailboxes. For example, if the subject of the meeting is "Marketing Conference" and the time zone is Saskatchewan, users would see a subject and time annotation similar to the following: Marketing Conference (Saskatchewan). In the users' Calendars, the place is annotated with the time zone, rather than the subject.

## Scheduling Recurring Items

Use Auto-Date to schedule recurring appointments, tasks, and reminder notes.

Auto-Dates can occur on the same day every week (for example, every Monday), the same days of the month (for example, the 15th and last day), or any other defined series of dates. You can also use Auto-Date to schedule irregular or infrequent events, such as holidays.

When you send an auto-date item, GroupWise copies the item and places one of the defined dates in each copy of the item. For example, if you define five dates for the event, GroupWise makes five copies of the item and schedules one copy for each date. If you send the item to other users, you will have five outgoing items with a five-occurrence auto-date. If you receive the event, you will find five copies of the incoming item in your Mailbox, each scheduled for a different date.

You can create an auto-date three ways.

1. Dates lets you select specific days from a year calendar.
2. Example lets you schedule events on the same day every week, the same day each month, or periodically.
3. Formula lets you enter the scheduling information in text format. This section contains the following topics:

### Scheduling a Recurring Item by Dates

1. In an appointment, task, or reminder note you are scheduling, click **Actions**, then click **Auto-Date**.
2. Click the days you want to schedule.
3. To move to a different year, click the year button, type the new year, then click **OK**.
4. If you want to clear all the dates you have selected, click **Reset**.
5. Click **OK**.

### Scheduling a Recurring Item by Example

1. In an appointment, task, or reminder note you are scheduling, click **Actions > Auto-Date**.
2. Click the **Example** tab.
3. In the Range group field, specify the starting date and ending date. Or  
To specify a certain number of occurrences rather than a range, specify the starting date, click the **End** drop-down list, click **Occurrences**, then specify the number of occurrences.
4. Click the **Days of the Week** drop-down list, then click an option.
5. Click the months to schedule. To schedule all of the months, double-click any month.
6. If you clicked **Days of the Month**, click an option from the **On** drop-down list, then click the numbered days you want to schedule (for example, 1 and 15). Or if you clicked **Days of the Week**, click the ordinal number across from the day of the week to schedule (for example, 2nd Tue). Or if you clicked **Periodic**, specify a period length (for example, Recur Every 15 Days).
7. If you want to clear the dates you have selected, click **Reset**.
8. To verify that you scheduled the correct dates, click the *Dates* tab. The dates you scheduled in the **Example** tab are selected in the calendars. If you want to deselect any occurrence, click the days you want to deselect on the *Dates* tab.
9. Click **OK**.

## Scheduling a Recurring Item Based on Another Day of the Week

You can schedule recurring items for events that occur a specified number of days prior to or after a specified day of the week. For example, you could schedule a meeting on the Monday following the first Sunday of each month (which may or may not be the first Monday of the month).

1. In an appointment, task, or reminder note you are scheduling, click **Actions > Auto-Date**.
2. Click the **Example** tab.
3. In the **Range** group box, specify the starting date and ending date.
4. Click the months you want to include. To include all months, double-click any month in the **Months** group box.
5. Click one or more ordinal numbers in the row across from the day of the week you want to base your scheduling on (for example, 1st in the Sun row).
6. Click a day of the week (for example, Sun).
7. Specify the number of days to offset (for example, 1), then click **OK**.
8. To verify the dates you have scheduled, click the **Dates** tab and check the dates selected in the calendar.
9. Click **OK**.

## Scheduling a Recurring Item Based on the Last Day of the Month

You can schedule recurring items for events that occur a specified number of days before or after the last day of the month. For example, if you want a reminder note to appear in your Reminder Notes List on the second-to-last day of each month, type -1 in Step 8 below.

1. In an appointment, task, or reminder note you are scheduling, click **Actions > Auto-Date**.
2. Click the **Example** tab.
3. In the **Range** group box, specify the starting date and ending date.
4. Click the months you want to include.  
To include all months, double-click any month in the **Months** group box.
5. Click the **Days of the Week** pop-up list, then click **Days of the Month**.
6. Click one or more days of the week (for example, Mon, Wed, and Fri). To include all days, double-click any day in the group box.
7. Click **Last**, then click the **Last** button.
8. Specify the number of days to offset, then click **OK** twice.
9. To verify the dates you have scheduled, click the **Dates** tab and check the dates selected in the calendar.
10. Click **OK**.

## Scheduling Auto-Dates by Formula

Schedule items this way for events that occur on the same day each week (for example, every Monday), the same day each month (for example, the 15th and last day), the same day of the year each year (for example, June 20), or in a defined period of time (for example, every 14 days). You can accomplish the same type of scheduling more easily using the Example and Dates tabs. Formulas should only be used if you are comfortable working with them.

1. In an appointment, task, or reminder note you are scheduling, click **Actions > Auto-Date**.
2. Click the **Formula** tab.
3. In the **Range** group box, specify the starting date and ending date. Or to specify a certain number of occurrences rather than a range, specify the starting date, click **Occurrences** in the **End** drop-down list, then specify the number of occurrences.
4. Type the formula text.
5. If you want to clear the Auto-Date dialog box, click **Reset**.
6. To verify that you have scheduled the correct days, click the **Dates** tab. The days you scheduled are selected in the calendar. If you want to deselect any occurrence, click the day you want to deselect on the **Dates** tab.
7. Click **OK**.

If you want the item to be scheduled annually, just type the month and date in the formula text field (For example June 20). An annual appoint is helpful for reminder items like birthday reminders.

## Using Auto-Date Formula Functions and Operators

You can schedule auto-dated items by formula, dates, or example. Formulas should only be used if you prefer them; scheduling is much easier by dates or example.

### Auto-Date Formula Functions

Use the auto-date functions listed below to schedule specific days of a week, month, or year. You must use the exact spelling of the functions. For example, GroupWise reads “tue”, but not “tues”. GroupWise formula functions are not case-sensitive.

- **Day of the Week:** For example, TUE would schedule all Tuesdays.
- **Day of the Month:** For example, the number 3 would schedule the 3rd day of the month. Also, the word LAST would schedule the last day of the month.
- **Day of the Year:** For example, 35 would schedule the thirty-fifth day of the year.
- **Month of the Year:** For example, JAN would schedule all days in January.
- **Year:** For example, 2006 would schedule all days in 2006.
- **Weekday of the Month:** For example, TUE(1). This would schedule the first Tuesday of the month. Also, SUN(LAST) would schedule the last Sunday of the month, and FRI(LAST-1) would schedule the second to last Friday of the month.

### Auto-Date Formula Operators

An operator is a character or word you insert in an auto-date formula to perform a specific operation. Each operator is assigned a priority, meaning that when a formula is evaluated, some operations are performed before others.

You can use grouping operators to group operators according to their priorities. The table below lists operators and their priorities. Additional details about the operators are provided following the table.