

Desktop Organizers

Order from Chaos

Hectic times require special methods of appointment management. The good old desktop diary is just not good enough. Time to look for a powerful software based PIM (Personal Information Manager). Making the most of the functions will make you more efficient.

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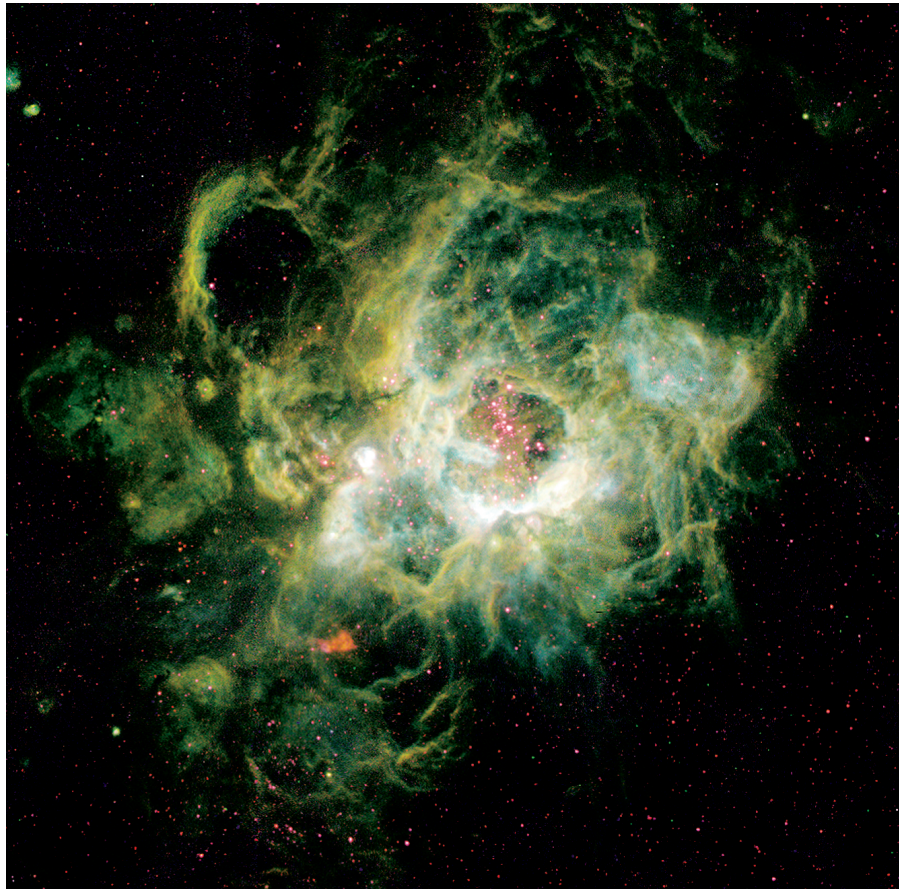
There is a meeting in Leeds tomorrow morning, you have to send out those meeting requests to the regional sales managers in the western region, and your private dates are getting out of control – it's Uncle Henry's birthday on Saturday, and you need an anniversary present by Friday at the latest if you want to stay out of trouble.

You would need to be a genius to keep all those dates in your head, and diaries are not really an option. Things you write down today will need to be typed and mailed tomorrow. So, if your whole communication setup is computer based, you will obviously need a computer based information management program. Just like in most other areas Linux spoils the user for choice.

We investigated the leading organizer tools, KOrganizer and Evolution.

Evolutionary Management

Evolution [1] aims to be a complete replacement for Outlook on Linux. This program not only provides calendaring functions, to-do lists and contact management, it also functions as a mail client and info center. The latter is available by clicking on *Summary* in the shortcut bar on the left. The default is a



list of mail waiting to be read or dispatched, pending appointments and tasks, plus a few news tickers. Appropriately for an info center, you can access the program module by simply clicking on an entry.

Keeping up with your appointments

From an organizational point of view, the calendar module is probably the most interesting. Only today is displayed by default, but the user can change this preference to display a whole week. To do so, click on the icons in the toolbar to select whether you will display your appointments for a whole week (see Figure 1) or even for the whole month.

First things first, let's enter some appointments to get started. The easiest way to go, is to double-click the required date. If you use the daily or weekly view,

you can even click on the required time. The *Appointment* dialog box that then appears (see Figure 2) contains appropriate fields the your entries.

The *Summary* item allows you to specify what Evolution will display in the calendar view. The central entry panel has enough space for longer memos, however, they will not be displayed in the overview. It still makes sense to add a few explanatory lines for each appointment, as Evolution's search function does allow access to the content of the summary. This dialog box also allows you to edit the date and time of an appointment. You can either enter the required data manually, or use the dropdown menu – this will include a practical miniature calendar that allows you to navigate through date entries.

The *Classification* and *Show Time* areas are some indication of Evolution's

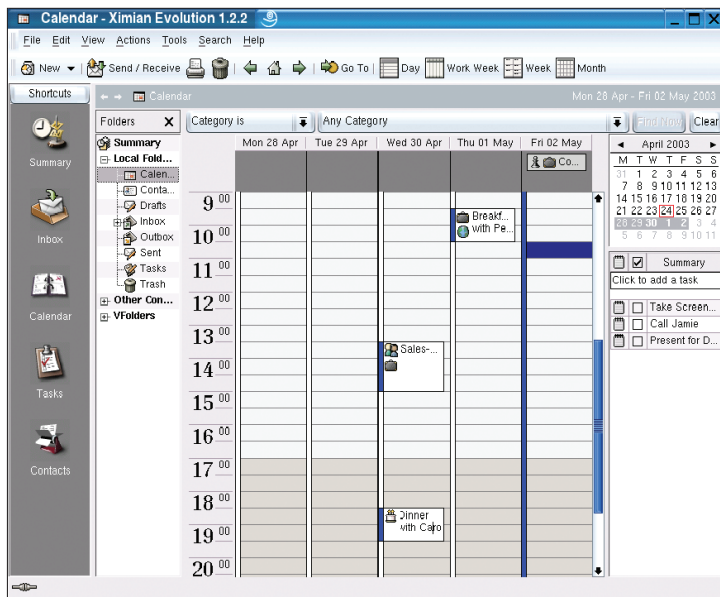


Figure 1: Week view in the Evolution calendar module

strengths as a team player. The former is useful if you're working in a networked environment. You can use the *File / Open another user's folder ...* to display the appointments and contact folder for another user, provided this user shares their calendar. If you decide to allow your colleagues to access your calendar, it makes sense to tag confidential appointments as such. The items below *Show Time as* allow you to do so.

If you tag the time of an appointment as *Busy*, colleagues viewing your calendar while planning a meeting will have some idea of a good time to start. The *Reminder* tag allows you to specify when and how you want to be reminded about an appointment.

Instead of a dialog box or a sound, you can also execute a program. One practical feature that Evolution offers is presenting you with the appropriate doc-

uments in time for you to prepare for an appointment.

To read a PDF file in time for an appointment, first select *Run Program* in the drop-down menu and specify the details in the window that appears when you click on *Options*. Enter the program you want to execute in *Run program:*, this could be also *xpdf* for example. The *with these arguments:* field is the place to enter the name of the document you want to open.

Time and Time Again

The third tab allows you to specify recurring appointments. This is where you will want to enter regularly recurring events, such as birthdays – or even your bowling night that reoccurs every two weeks – also the place where you enter events that reoccur regularly up to a point in time, -- weekly project meetings

that will be superfluous as soon as the project is completed.

Clicking on *Save and Close* will insert an appointment in your calendar. You do not need to open the editing window to edit an appointment at a later date, instead you can use the mouse to drag the edges of an appointment and thus edit its time slot.

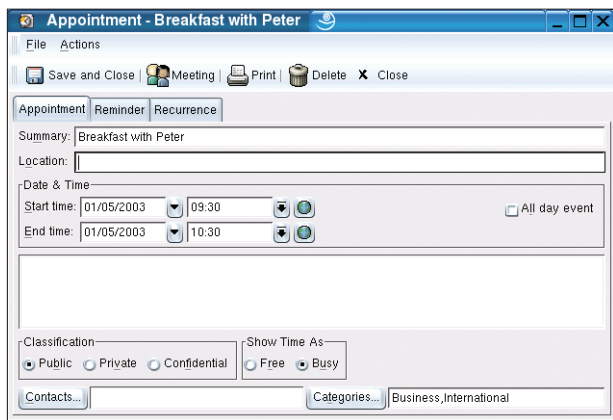


Figure 2: Comfortable appointment editing in Evolution

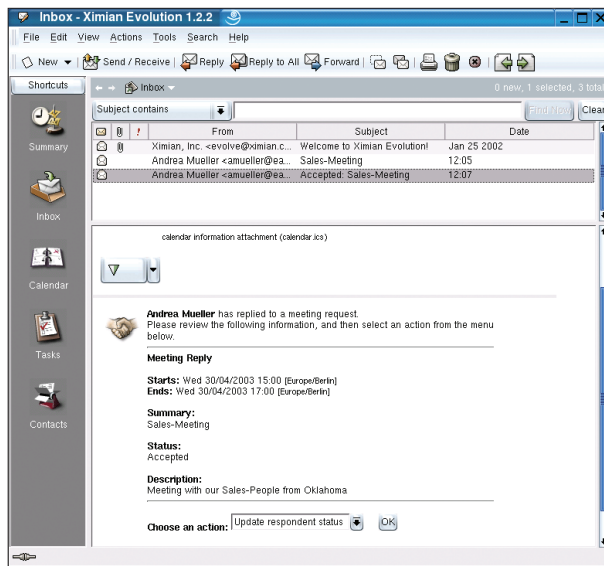


Figure 3: Evolution can update the data for your meeting at the click of a button

Teamwork

The *Meeting* button provides access to a powerful function in the appointment window. When you click on the button, an additional tab (*Meeting*) appears. You can now click on *Invite attendees* to add attendees from your Evolution address book. When you save this, e-mail messages are automatically sent out to the other attendees.

If the recipient also uses Evolution, the user can accept or decline the appointment directly by clicking on the button in the mail window. Evolution will then take care of dispatching the response and updating the calendar of the user with the request. Acceptance responses addressed to you will also contain a button (see Figure 3) that allows you to update the status of the attendee you invited.

One of Evolution's neater tricks is the fact that the program reacts intelligently. If you change the appointment for a meeting and then store your changes, Evolution will automatically ask you whether you want to inform the attendees about the change.

Tasks at a Glance

Instead of using the shortcut bar on the left to switch to the *Tasks* view, you can manage your tasks directly in the calendar view. The task window is shown on the right of your screen.

If you click on the first line, a data entry field opens up allowing you to

decide on a short description. Double-clicking the tab icon to the left of a task opens a dialog box where you can define additional preferences. This allows you to specify items such as the completion date and priority. However, the task window cannot be expanded to its full width in the calendar view; thus, using the shortcut bar to switch to the task view is preferable for reasons of readability.

Sadly, some features you may be looking for are missing. There is no way to assign different colors to tasks, and you cannot sort entries according to individual criteria, such as their priority or completion date. Although the search function does provide a similar effect, it will only display entries that match the search criteria.

Keeping in Touch

Address management is one of Evolution's major points. It is hard to imagine details that the three address entry tabs do not allow for. Multiple addresses, innumerable telephone numbers, nicknames, partner's names, the names of bosses and their assistants – the developers really have done their homework. If you do need an additional category, you can simply resort to the large memo field and add any required notes.

As Evolution not only manages contacts, it is quite a communicative entity itself, you can use the *gnome-pilot* to synchronize Evolution with your Palm Pilot. The first time you launch the *Tools / Pilot Preferences* a Wizard is launched to help you through the setup steps. It makes sense to use the current versions of the programs involved. Evolution Version 1.0.8 was so communicative that it transferred duplicate and even triplicate appointments.

Having said that, Evolution is a mature solution for appointment and contact management, although its to-do manager could provide a

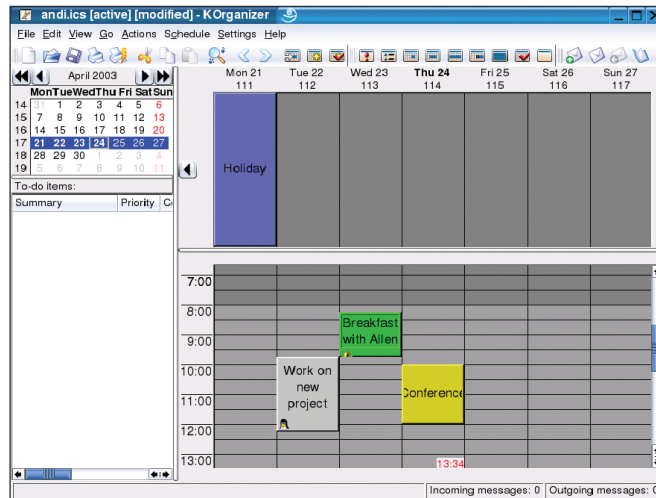


Figure 4: Individually modified calendar view in KOrganizer

bit more in the way of functionality. The fact that the calendar module occasionally crashes is a real pain however. You cannot re-launch the calendar in an Evolution session, so there is no alternative, but to close Evolution and re-launch if you want to access the calendar.

Information Management on KDE

KOrganizer [2] follows a different approach. Of course the tool offers users interesting in getting organized access to their mail and address books, however, not as integrated program components. Instead KOrganizer accesses other KDE programs such as KMail and the desktop's proprietary address book.

You can also select *Preferences / KOrganizer setup / Personal* to select a mail address independently of the KDE Control Center. If you do not like KMail for some reason, the PIM can also use the *sendmail* command to dispatch your email to its destination.

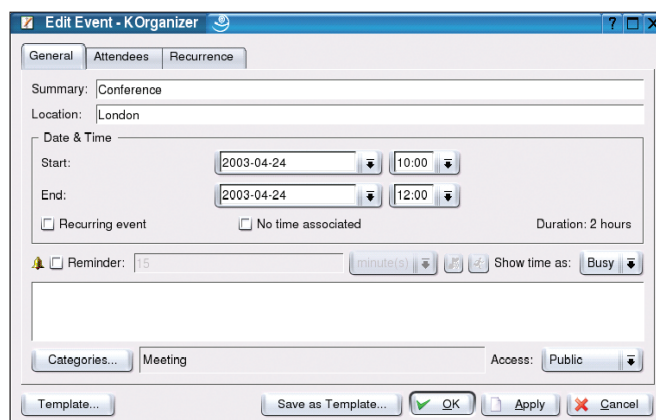


Figure 5: Entering appointments in KOrganizer

Well-Planned

The calendar function looks a bit dated when you first start it — appointments are represented by simple gray fields. Fortunately, it is easy to change this setting using *Colors* in the setup menu. This allows you to define different colors for different categories, and this can make your calendar a lot more comprehensible (see Figure 4). The fact that the view is split into two distinct areas with a time scale and a daily view is also a big help.

The steps for creating an appointment are similar to Evolution (see Figure 5). It looks like the programmers copied the data entry mask from Outlook — on the upside, it does not take long to get acclimatized if you switch organizer applications.

In addition to specifying the time and date, you can use the first tab to specify a recurring appointment. The steps are not particularly intuitive, as you then need to open the *Recurrence* tag to add detail. If you access the tab without having checked the *Recurring event* checkbox in the first tab, you will not be able to select any preferences in the *Recurrence* tab; but at least a note with the steps for enabling the recurrence function is displayed.

In contrast to this, the appointment reminder function is well implemented. To have the program remind you about an event, you do not even need to launch *korganizer*.

When you launch KOrganizer, a small calendar icon appears in the system area of the KDE taskbar – the alarm program. You can use the drop-down menu to enable *Automatically launch alarm daemon at login*. If you do so, the daemon will ensure that you do not miss any important appointments in future – of course, this assumes an active KDE session. However, only the *active* calendar is monitored. KOrganizer allows you to manage multiple calendars, but only your default calendar will be

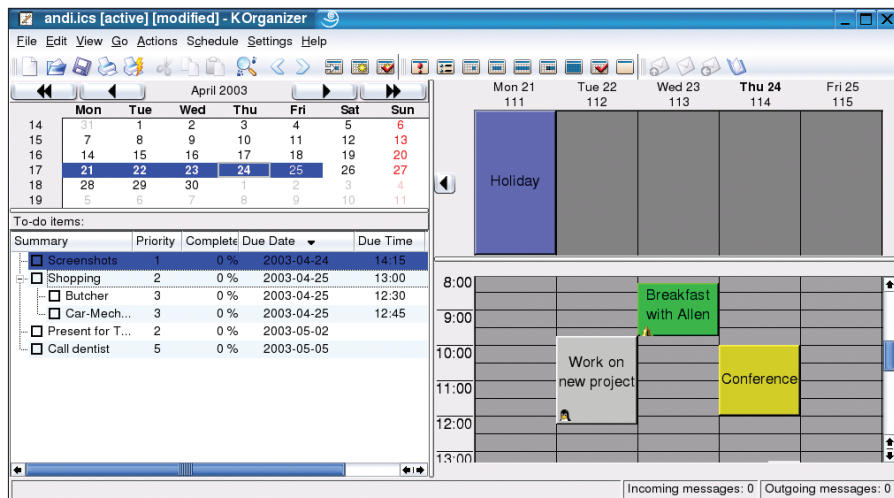


Figure 6: To-Do list in KOrganizer sorted by due date

automatically monitored. You can use *File / enable* to select a default.

Collaboration

If you are planning to request the attendance of some other users at a meeting, you can add the details in the second tab. You can either add attendees manually, or compile a list from existing address book entries. KOrganizer will not automatically notify the attendees.

If you want to request attendance by mail, you will first need to highlight the time slot for the meeting and then select *Schedule / Request* in the menu to launch KMail.

The difference between this function and the *Schedule / Publish* menu is a bit difficult to understand. Where the *Request* is only available for entries where you have added some attendees, *Publish* can be selected for any entry. The addressee is then sent a mail message with an **ics** attachment.

The KOrganizer *File / Merge calendar* can monitor your appointments in this case. If you want use this technique to forward appointments, you should avoid non-standard characters – and the attachment encoding is not significant in this case. Failure to do so will mean that KOrganizer will display imported ical files with incorrect character conversions.

GLOSSARY

ics: Calendar file format, originally used by the ical program. Nearly every organizer tool can import files in ical format.

To avoid this bug and if the recipient does not have a program that can read ics files, KOrganizer provides a HTML export facility. However, you will need to enable this feature via *Preferences / Setup Plugin...* to display it in *File / Export / Export as website*. Besides the *Web Export* plug-in, you can enable various other useful tools here, for example the *Import plug-in for birthdays*. If your KDE address book data is well managed, you should be able to import anniversaries to KOrganizer via *File / Import / Import birthdays*. There is even an option to use a Microsoft Exchange-Plugin, however, since we do not have an Exchange Server there is very little we can say about this feature.

Scheduling Assistant

KOrganizer provides seamless to-do list management integration. You can use the drop-down menu to create new tasks and specify a completion period, the priority and possibly a staff list for the task. This is not restricted to simple lists; instead the drop-down for each task allows you to define a sub-taskgroup.

In fact, KOrganizer almost provides project management facilities. The to-do list, which docks to the left margin of the window can be expanded to provide a complete overview of the entries in the list (see Figure 6). Clicking on a list header will sort the to-do list by the selected category.

Clicking on the same category once more will sort in the opposite order. If you check a task as completed, KOrganizer will automatically modify the entry

in the *Completed* column, setting the value to 100%.

To keep an eye on your current appointments, you might like to delete any non-current tasks using *File / Delete completed tasks*. The same menu provides a function for removing appointments from way back when. *File / Archive old entries* allows you to specify a threshold date for archiving task data and tell KOrganizer where to store the archive. If you are sure that you will not need your archive data, you can click on *Delete* to remove it permanently.

Connecting to the Outside World

Today's global players need to have their appointments at hand at all times, and will want mobile access to them. Of course, an old-fashioned diary will not do, instead appointments will be stored on a PDA in a digital format. If you have installed *kpilot*, there is nothing to prevent you synchronizing your data with KOrganizer. However, both the KOrganizer and the alarm daemon must be disabled during synchronization.

The KDE organizer even goes a step further and can communicate with the Sharp Zaurus in addition to the Palm Pilot. The software needed to do so is called *kitchensync*. The article on page 24 of this issue provides additional details.

Some of KOrganizer's functions are quite impressive in part. The to-do list implementation is well thought out and leaves little to be desired. The calendar provides some extremely useful features, such as the various views and an HTML export facility.

On the downside, the team functions are slightly unwieldy, often leaving the user to shuffle through the menus to find the required action – Evolution is more intuitive in this respect. Due to the homogeneous look & feel of KMail and the KDE address book, the fact that KOrganizer accesses external programs for extra functionality will tend not to upset Linux users too much. ■

INFO

[1] Evolution: <http://www.ximian.com/products/evolution/>

[2] KOrganizer: <http://korganizer.kde.org>