

Scheduling appointments and tasks with KOrganizer

ALWAYS SOMETHING THERE TO REMIND YOU

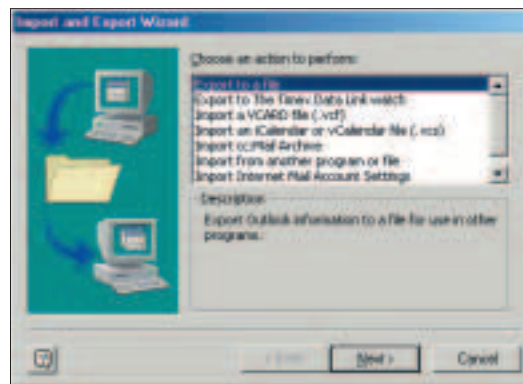
The KDE's scheduler KOrganizer offers nearly as much usability as Outlook's built-in calendar. Their functionality and desktop structure are very similar so the switch from Windows to Linux's KDE desktop needn't require a period of readjustment.

KOrganizer is a standalone application and is not integrated into an email client such as KMail. Nevertheless, it is possible to send invitations to attendees via email.

Should you be looking for KOrganizer in the standard installation of SuSE Linux 7.2, on which this workshop is based, you will be searching in vain, as this tool has to be installed separately. That's no problem though, as it is one of the software packages included in the distribution.

Start **YaST2** via *K/SuSE/System/Configuration/YaST2* and enter the root password. Launching YaST2 will take a moment. Select *Software/Install/Delete Software*. KOrganizer can be found in the package *kdepim* – Personal Information Manager. You will find the software under *X11/KDE/Basics*. Double-click the package (causing an "x" to appear at the beginning of the line) and confirm with **OK**. The software will

YaST: YaST stands for **Y**et **a**nother **S**etup **T**ool and is the tool that guides you through the installation of the operating system in the SuSE distribution. Subsequent changes to the system, such as the installation of additional software packages, setting up an Internet connection, network setup or the installation of new hardware, are also performed using YaST2. As an alternative there is also the text-based YaST where some other configurations are carried out and which requires less resources.



You can export your Outlook calendar to KOrganizer

now be installed on your system and you can then find the scheduler in the start menu under *K/SuSE/Office Applications/Organisation/KOrganizer*.

For a frequently used application like a scheduler it is handy to be able to start the program via the panel or desktop. If you would like to create a panel button for KOrganizer open the context menu by right-clicking a free space on the panel and select *Add/Button* followed by the menu path.

There is some good news to start with: you can import your Outlook calendar into KOrganizer. To do this, you need to export the data in the vCalendar format, VCs. The easiest way to do this is to select *File/Import and Export* in Outlook. A wizard appears. Select "Export to a File" and then "Personal Folder File (.pst)".

The folder from which you want to export is the calendar, so you need to select that. In the following step, "Save exported file as", click on *Browse* and enter a name for the file to be saved, with the extension ".vcs". Set the file type to "All Files" and if necessary delete the default format "*.pst". Now copy this vcs file into your **home directory**. In KOrganizer select *File/Open*, look for the file and double-click it.

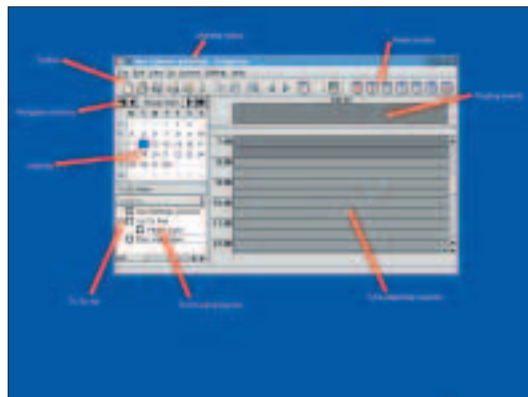
The Outlook calendar has helped Windows users overcome the problems of forgotten appointments and with KOrganizer you don't have to forgo punctuality and order under Linux either.

Anja M. Wagner
finds out why

Home directory Linux automatically creates a home (i.e. personal) directory for each system user. It is similar to the "My Documents" folder under Windows.

Let's get to work

Now we come to setting up and working with KOrganizer. The desktop is divided into three sections. In the top left-hand corner is a calendar view of a month, which doesn't contain text, only numbers with letters representing the days of the week. This is called the date navigator. Days for which appointments have been entered are represented in bold, but more on that later.



The constituents of the KOrganizer desktop

Below the date navigator is a field listing existing tasks. The largest part of the screen is taken up by the calendar view. Similar to Outlook this can be switched between a day view, a view of the working week from Monday to Friday, a view of the entire week or a month view by using the appropriate buttons on the right side of the toolbar. That should be enough for now to give you a rough overview.

The date navigator is a sort of eternal calendar. You can use its four navigation buttons to move backwards and forwards in time. The buttons with double arrows change the year while the single-arrow buttons change the month. We stopped our backwards journey at the time of the French revolution of 1789; making an early note of your trip on the USS Enterprise in the year 2367 also presents no problems.

Clicking on a date in the date navigator causes the day view for that date to appear in the main window. Shades of grey are used to distinguish between working and other time; you can customise this according to your own preferences. But before we get involved with design matters we will first of all explain how to enter appointments and tasks using some examples.

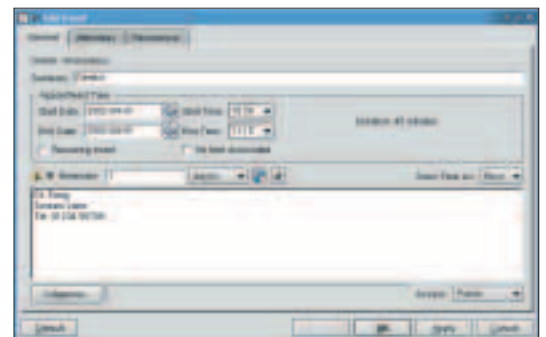
For instance, to enter a dentist's appointment on the calendar, select *Actions/New Appointment*. An entry form appears in which you can input the details of the new appointment. On the "Summary" line enter the text to be displayed in the calendar. Some sort of heading, like "dentist" would be useful, but this is not always possible. If the text you have entered is too long it will be truncated in the calendar. We will explain later in the workshop how

you can still display it in its entirety.

Now select the date of your visit to the dentist and enter the start and end time of the appointment. You can select the times from the dropdown menu down to the nearest quarter hour, or you can manually enter any time you like.

Leave the option "Recurring Event" deactivated, as this is a one-off, or at least an irregular appointment. On the other hand, it might be good to activate the "Reminder" option to ensure the dentist doesn't end up waiting for you in vain. You specify how many minutes, hours or days before the event you want to be reminded. Click on the icon with the note and select a sound file.

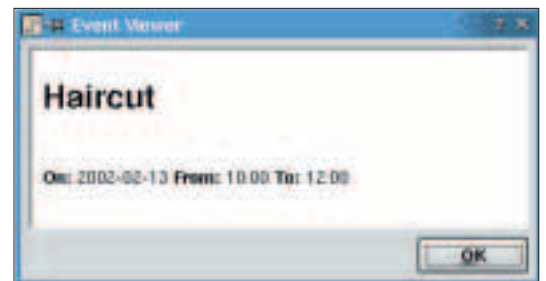
The duration of the appointment can be shown as "busy" or "free", although this does not seem to make any difference to the way it is displayed. In the large text field you can enter additional information and details for the appointment if required, for instance the address and telephone number of the dentist or a question you are planning to ask him. The priority of each appointment defaults to one, the highest, though it can be set as low as five.



Entering a new appointment

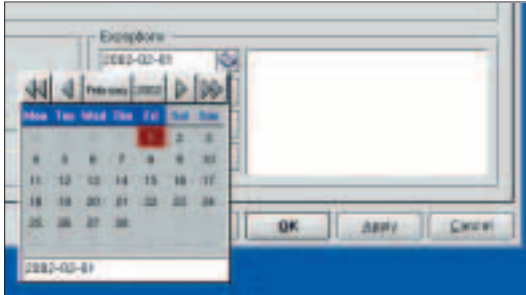
Finally, the appointment can be assigned a category. Click on the Category button and select one of the twelve entries available, among them meeting, business, birthday, etc. You can also add your own categories. Click on Edit Category and write "doctor" in the text field at the bottom of the new window. After clicking on Add the new category will appear in the list. Highlight a category in order to remove or edit it, for instance to change "business" to "job" or "work".

Tick your chosen category and confirm with *Apply/OK*. The selection of a category is not



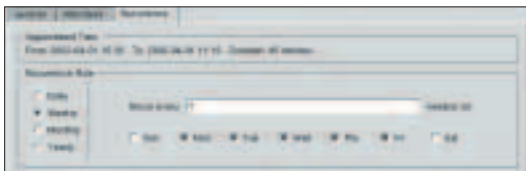
Viewing your reminder

mandatory, but since you can set the KOrganizer desktop to show each category in a different colour it can make it easier to find your way around the calendar (see below).



No rules without exceptions

Unlike in Outlook you cannot access the entry form for creating, viewing or editing appointments by right-clicking on the day view, but double-clicking does work. Depending on which half hour segment you double-click that time is set as the start time.



Smart rule design saves work

Recurrences

You only need to set up a regularly occurring appointment once. KOrganizer will then create appointments in the appropriate places according to the rules you define.

You meet up once a month with friends to discuss Linux? If you do this on every third Wednesday of the month, go back to *Actions/New Appointment* on the menu bar. The settings are the same as for a one-off event, but this time you activate the option "Recurring Event". This takes you to the *Recurrence* tab. Here you specify the criteria for the recurrence of the appointment. Is it a daily, weekly, monthly or annual event? The entry field on the left changes according to the frequency of repetition. For our example choose "monthly". Now specify that the event takes place on the third Wednesday of every month. It is also possible to set up every second or third month.

You can specify exceptions from this pattern, for example public holidays. Under "Exceptions", click on the button to the right of the date field. A small calendar opens and you can select the exception and click on Add. Each exception needs to be added separately, therefore only appointments with irregular exceptions should be entered in this way.

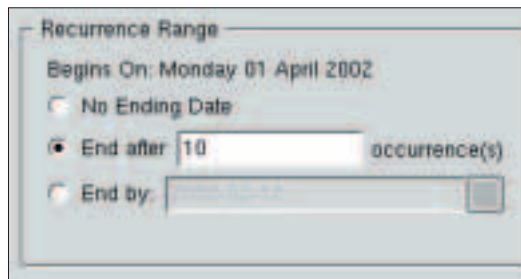
In case of regular exceptions you ought to amend the recurrence rule. An event that only occurs on certain days of the week, for instance only from

Mondays to Fridays, should be marked as weekly and the days on which it occurs should be ticked. You can also define the end of a regular event, for example if you're taking ten dance classes.

It is, of course, also possible to enter annual events such as birthdays, anniversaries and the like. Events that are not associated with a particular time appear at the top of the day view, making them more noticeable.

You can move or change one-off appointments with the mouse in the day or week view. If you click on an appointment and keep the mouse button pressed the pointer turns into a cross. You can now "grab" the appointment and move it to a different part of the day, or even to another day by using the date navigator. If you touch the border of the appointment field with the mouse pointer it changes into a double arrow. You can then move the border and change the duration of the appointment.

Recurring events cannot be moved with the mouse. To change these open the context menu by right-clicking and select *Edit* to change the settings. Clicking on *View* in the context menu shows a complete summary of the heading, date, time and any other information you may have entered when you created the appointment. The option *Reminder On/Off* allows you to activate or deactivate the alarm.



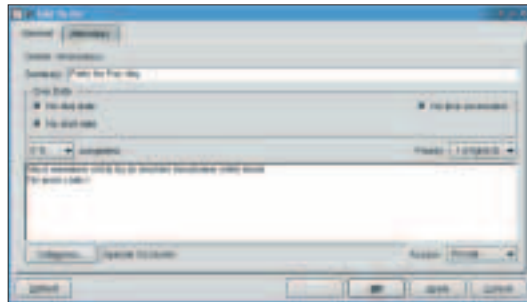
It's all over after ten appointments

It is also possible to configure appointments with several attendees. However, the group scheduling feature has not been implemented yet. When creating group appointments you initially follow the same steps as for any other appointment. Then select the Attendees tab. In the text boxes enter the name and possibly the email address of the attendees. A dropdown menu allows you to select their role in the meeting from attendee, organiser, owner and representative. There are eight status options for attendees: preparation required, accepted, sent, attempted, confirmed, rejected, completed and delegated. Once you have defined the features click on Add and the attendee appears in the large text field. Should you need to amend the status of an attendee later on, for instance because he has cancelled, highlight him with a mouse click, change the status and then click on the Edit button.

If invitations are to be emailed you need to have entered the address. Close the edit window with

KOrganizer will then create appointments in the appropriate places

Apply/OK, click on the appointment in the calendar and select *Actions/Appointment By Email* from the menu bar. The recipient of your message will see the appointment's summary line as the subject and the date, start and end time in the body of the message.



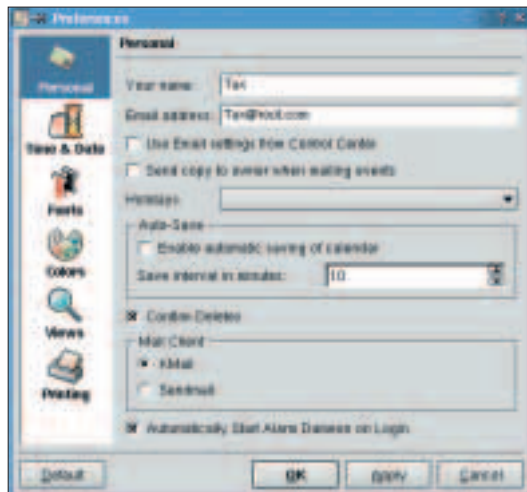
When the going gets tough, the tough start task lists

No set date: todos

There are many things in life we have to do that are not attached to a specific date. The car needs to be washed, the tax return has to be done, the suit must be taken to the dry cleaners and lunch with a colleague should really be arranged. All these things come under the heading of todos. Whenever you start up KOrganizer you will be reminded of any outstanding tasks by the list of incomplete todos in the bottom left-hand corner.

To enter a new task on the todo list select *Actions/New Todo* from the menu bar. The process is similar to creating a new appointment, but you activate the options "Without Date", "No Start Date", "No Fixed Time". Todos can also be assigned categories. The button on the left above the day view opens a large window showing all tasks.

For more complex tasks – a tax return, for example – you can set up subgroups such as "find P60". Open the context menu by right-clicking on a todo and select *New Sub-Todo*. Todos can be moved within the todo window or copied into another open KOrganizer using drag & drop. Completed todos are



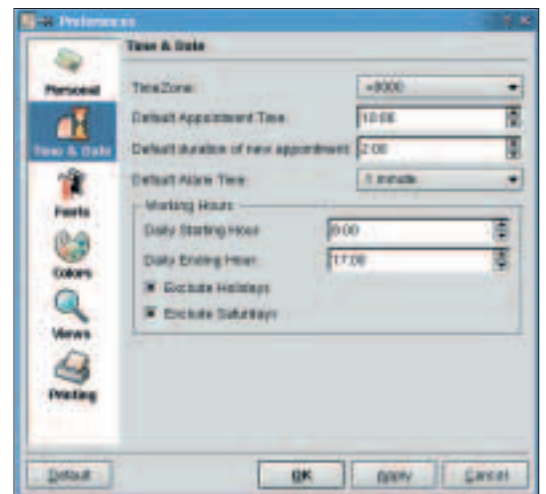
Customising the scheduler

marked with a tick. They remain on the list until you right-click them and select *Purge Completed*.

Configuration

To configure your own individual scheduler go to *Settings/KOrganizer Set-up* on the menubar. In the *Personal* section you can tell the scheduler who you are. Text boxes are available for your name, address and email address. This is also where you specify whether and if so at which intervals the calendar will be saved automatically, as well as which holidays are to be displayed in the calendar. Since you can set up several KOrganizers, one of them can show the holidays for a different country. That way you will know, for instance, when your friends in the US are enjoying a day off.

When you email invitations to appointment attendees you can receive a copy of the mail yourself if you activate the option "Send Copy To Owner When Mailing Events".



Setting time zones and working times

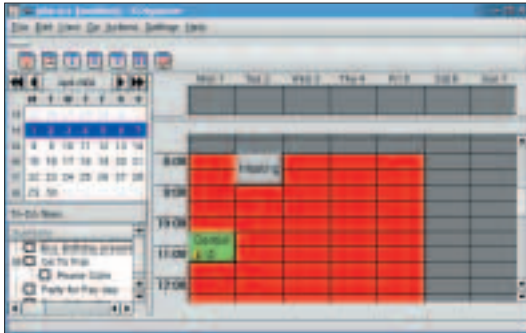
The section "Time & Date" relates to the five-day week view. The working day is pre-set to start at 8am and end at 5pm. You can adjust this to reflect your working day by entering your own times.

The most noticeable changes can be made in the "Colors" section. You can choose colours to distinguish between work and leisure time as well as for the appointment categories, allowing you to tailor the appearance to your own preferences (as is normal in KDE applications). To choose a colour click on the appropriate button on the right and select a colour from the colour palette using your mouse or enter the relevant HTML colour code.

Colour selection is particularly useful for categories. The standard setting is to display all categories in a light shade of grey. If you emphasise a category by assigning it a more noticeable colour you will be able to tell at a glance which sort of appointment you're looking at. In the category dropdown menu select, for example, "special" and click on *Select Colour*. You can change the font and its size under *Font*.

The section *Views* contains some more useful

There are many things in life we have to do that are not attached to a specific date



Categories in striking colours make the calendar clearer

options. If you specify here at what time your day begins the hour you have selected appears at the very top of the day view. That means you have to scroll to get to earlier times, since, like in real life, every day actually starts at midnight.

The month view does not have much space to display your appointments so the headings are truncated after only a few characters. However, it is possible to set up a scrollbar for the individual day fields. If you activate the relevant option you will be able to read the whole entry by scrolling along it.

The easily cluttered month view can be maximised to fill the entire screen. The same is true of the todo list. If the relevant options are deactivated these views form part of the main window, which takes up two thirds of the desktop. A very useful option is "Enable tooltips for event summary display". When this is activated and the mouse pointer is moved over the summary displayed in the calendar the entire text is displayed in a separate field. The principle should be familiar from the tooltips for buttons in Windows as well as KDE.

The two options "Show Daily Events In Date Navigator" and "Show Weekly Events In Date Navigator" should be deactivated – that way only irregular appointments are shown as bold in the navigator. Otherwise it won't be long before all numbers are bold and the emphasising effect is lost.

Even without a laptop you can take KOrganizer with you wherever you go, as a paper printout. Under *Print* you can define what sort of paper is in the printer. When printing via the menu bar you can choose between the day, week and month views and the todo list. A print preview option is available for each option.

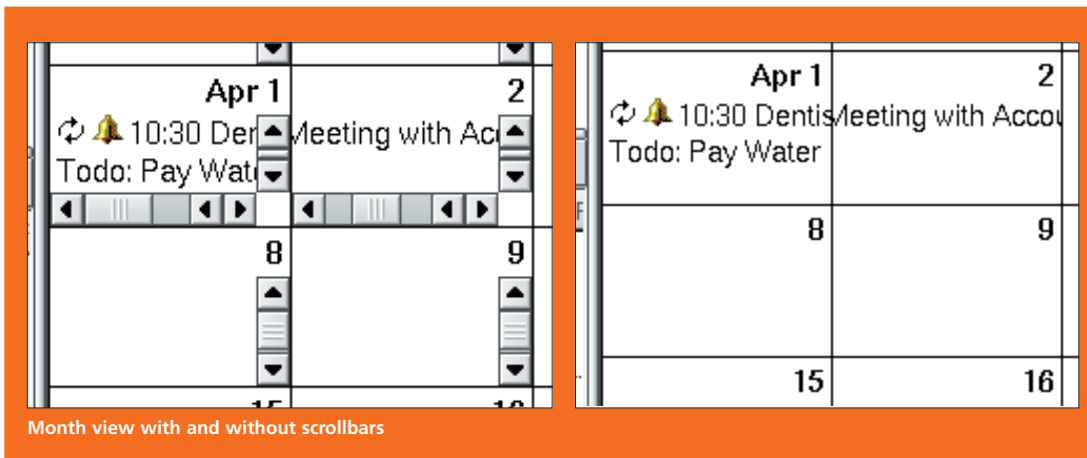
Search function included

Once you have used KOrganizer quite heavily for a while you will get to the point of asking yourself "when was that again?" without wanting to click through the whole scheduler with the mouse. There's no need to, either, because of a useful feature to be found under *Edit/Search* on the menu bar. Simply enter a search term, which can include the wildcard "*" for a number of characters and "?" for just one character. You can also limit the search by time or subject (headings, descriptions and/or categories). Double-clicking on a search result opens the appointment enabling you to edit it.

In theory KOrganizer should be able to archive old entries, but unfortunately the tool seems to crash in the attempt.

You are not limited to one single calendar – via *File/New* you can create additional ones. All calendars are written to your home directory as vcs files. Use *File/Open* to select another calendar. However, only one calendar can be active, this is the one that will be loaded automatically when starting the program and also the only one that can trigger alarms. The status is displayed in the title bar of whichever KOrganizer window is open. To activate another calendar, open it and select *File/Activate*.

It is possible to merge several calendars. Click on *File/Merge Calendar*. The directory containing all calendar files opens and you can select the one that is to be merged with the calendar that is currently open. The calendar that is added in this way remains intact.



Month view with and without scrollbars