



FIRST STEPS LINUX BEGINNERS SERIES

Evolution Manage your email



If you have email to organise, contact details to store or projects to manage, this simple tutorial of *Evolution* hacks will make a big difference. Your life coach Andy Channelle is ready at the whiteboard...

**LAST
TIME**

We travelled through blogs, Flock, Flickr and *DigiKam* to pick up some Web 2.0 skills. If you missed the issue, call 0870 8374773 or +44 1858 438795 for overseas orders.



Is it just me, or does the work involved in any given job grow in inverse proportion to the actual time available to do it? I think that's why people planning to build a house in three weeks on television end up taking three years (and go 330 times over budget). What is usually missing from these projects is adequate planning. That's what we're concentrating on in this installment, and the tool of choice for the job is *Evolution*.

Most people will encounter *Evolution* simply as a superior email client, but it is capable of so much more. Its true strength lies in its ability to bring together a ton of information within a single application and then enable the user to create links between different parts. For example, if you add an important

of contacts in *Evolution*, then use it to have all their related emails shepherded into one place and invite them all to group meetings and the like through an online calendar. Don't be thinking that this functionality is only useful for professionals or part-time Linux projecteers – it certainly can be used for formal project management, but it will also make a big difference for people who simply get a lot of email, while anyone with even a sniff of anal retentive about them will be happy here.

For the sake of simplicity, I'm going to assume you have *Evolution* set up for email (you'll find it on our coverdisc), then start bringing the rest of the system together. If you don't, the application has a great startup wizard that will hold your hand through the configuration stage the first time it's launched.

“THIS FUNCTIONALITY ISN'T JUST USEFUL FOR PROFESSIONALS OR PART-TIME PROJECTEERS.”

deadline to a calendar on *Evolution* it can be communicated to everyone who needs to know about it a few days before the event is due without intervention from a forgetful human. Planning, see? In this tutorial I'll show you how to create a group

Create the group

The first step on the path to decent project management is to define members of your team. This might be members of a department, contributors to a university project or even just your family (if you're ruthlessly planning a couple of weeks in Butlins), and *Evolution* makes it simple to corral people into groups for this purpose.

I'll set up a small group for this example (three people plus me) and will assume I have recently received email from them, which means their details will already be partially in the application. To add them fully, I'll have to enter the details into

Evolution's Contact Book, which can contain several address books divided into categories. The easiest way to do this is to right-click on each of the names in turn in the 'From:' section of an email and select Add To Address Book. This will offer the options of simply adding the name to the address book or going for the full editing screen. Select the latter and add the necessary detail for your contact. It is here that we begin to move away from standard PIM territory.

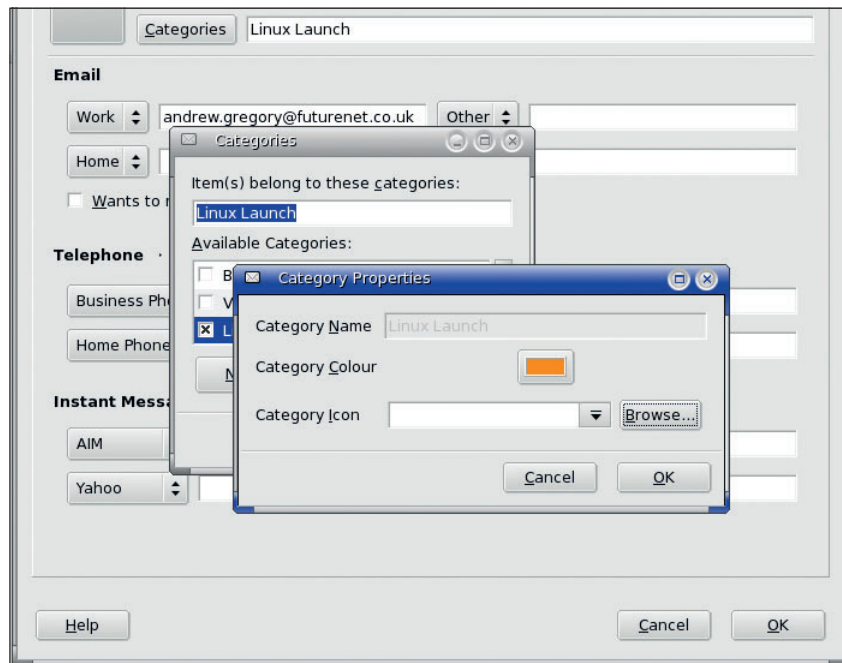
Evolution has just one contact book set up for personal details by default, so we need to add a second. In the right-hand pane of the main *Evolution* window (with the Contacts tab selected), right-click just below where it says On This Computer and choose New Address Book. The 'type' should be On This Computer and the name can be anything you like, such as Work Linux Launch. Now select the Contact Editor again (the window should still be active in the task bar at the bottom of the screen) and change the Where: drop-down list to the address book you've just created.

That's the first division sorted, but if you work with lots of people you might want to refine the data a little. In this case, the Categories option is very useful (see image, right). As standard it comes with the usual choices for arranging your data such as Birthday and Holiday, but it's easy to add new categories. Just hit the Categories button to open the dialog box, select New, provide a name and, optionally, a category colour and/or icon (I'm choosing orange) for highlighting any notes or meetings involving members of the group. Creating groups and categories just makes it easier to find things later, so it's worth taking the time to do it right!

Sorting the mail

We're now going to start labelling the emails concerning this project to distinguish them from the rest of our messages. *Evolution* provides two excellent ways of doing it, both of which are based on the concept of filters. As the name suggests, a filter can be used to let through only emails that meet certain criteria, thus ensuring you only get bothered with what you need.

The first way to sort the mail is to create a new mailbox (right-click on the On This Computer text in the left pane of the Mail tab, select New and offer a name), and set the application to file messages in there when they arrive. To start, select Tools > Filters and then hit the Add button. If you're running the latest version of *Evolution* (2.4) you'll find the same option under Edit > Message Filters. Once we've given the filter a name (let's say



Sorting data into categories always makes it easier to search through it later.

Work again), we can begin defining what it will let through by using a combination of drop-down lists and entered factors to determine where a message ends up or if some action should be performed upon it.

For this project all of the participants have email addresses that end with 'futurenet.co.uk'. So let's stipulate that, for this project, the message sender's address should contain that domain ending by selecting the first two drop-down lists, Sender and Contains, and adding 'futurenet.co.uk'. However, I don't want to filter messages from everyone from Future Publishing into the same mailbox, just people from *Linux Format*. Knowing that each of the editorial staff has the magazine's name in their email signature, I can exclude, for instance, anyone from *Mac Format* by adding another rule and selecting Message Body > Does Not Contain and then inputting 'Mac Format'. These are all called If statements and they set the filter criteria.

The second section is the Then statements, which set the action of the filter. There are quite a number of actions we can perform here, from sending the project messages into a mailbox >>

QUICK TIPS

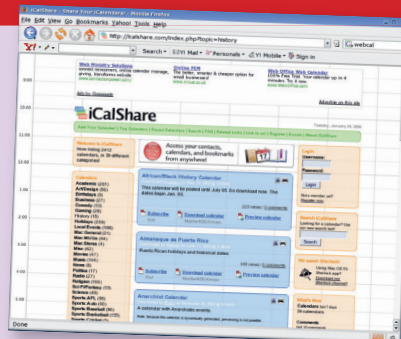
- In my experience, even small projects tend to end up accumulating lots of files, so it's sensible to add a sub-folder to your main documents folder to house these. As well as making backups easy, this also means you won't have to spend 35 minutes looking for a file you're certain you saved to the desktop.

- Use the calendar in *Evolution* to make staged backups of important documents. Create appointments for each stage of the document creation – outline, first draft and so on – and drag the actual file from the file manager into the Attachment Bar. You'll have a complete record of the creation process. Just remember that if you delete an event, meeting or task, its associated attachments will also swan off into the ether, never to return!

- Add more columns to the Task section. Right-click on the column headings and select Add A Column. Essential columns are Due Date and % Complete. The latter can be updated as the project progresses using the drop down list, so you can prioritise different tasks.

- Subscribe to remote calendars using the Web Calendar feature. Do New > Calendar, select On The Web from the drop-down list and add a URL. There is a large selection of freely available calendars covering a variety of uses at www.icalshare.com.

- Make your own web calendars. Once you've assembled the required data (this could be public events, or just personal stuff), right-click on the calendar in the left



pane of the *Evolution* window and select Save To Disk. The calendar will be saved in the .ics (Internet Calendaring and Scheduling) format, which can be submitted to places like www.icalshare.com or sent to friends running iCalendar-compatible software – instant synchronisation.

of their own (which has the advantage of removing them from the main inbox completely) to something less drastic such as changing the colour of the text. As we've assigned a common orange colour to the group we set up before, it would make sense to do the same to emails from people within that group. It's even possible to set rules so that messages that conform to a particular criterion can trigger a different sound when they arrive, just like a personal ringtone on a phone.

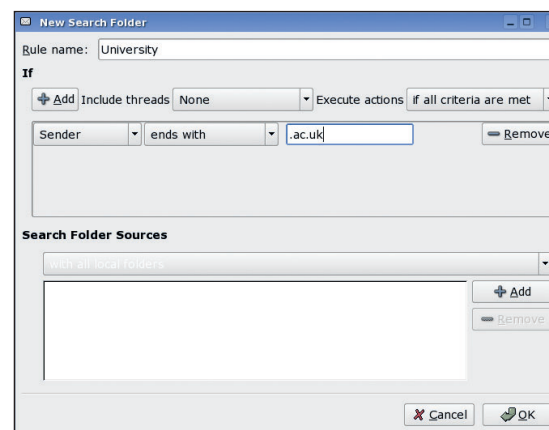
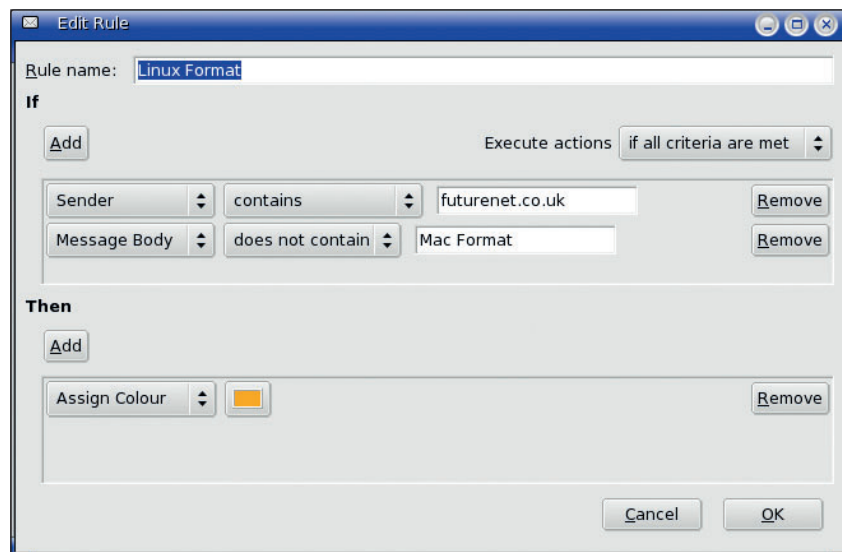
Whatever you get the filters to do, the standard procedure is that they'll then be applied to subsequent incoming messages. However, you can apply them retrospectively by selecting all of

“VIRTUAL FOLDERS SORT MAIL INTO CATEGORIES WITHOUT MOVING IT FROM THE INBOX.”

the messages in the top pane (Ctrl+A) and then doing Messages > Apply Filters or hitting Ctrl+Y.

In addition to the filters, *Evolution* has really smart virtual folders. These are called vFolders in older versions of the application, and Search Folders in 2.4. Regardless of the name, these folders allow you to sort mail into categories, much as we did above but without moving it from the main inbox. In effect, Search Folders apply a set of rules to incoming mail and, if a message satisfies the rule, creates a link to it within the virtual folder. The smart thing is they are dynamic so the rules can be

Evolution's rules-based filters for email are incredibly flexible.



Search Folders can pull everything from particular addresses or domain names into one folder.

defined and redefined without affecting the physical location (if such a thing were possible on a computer) of the message.

To create a new search folder, right-click on the Search Folders text in the left pane and select New Folder. You'll be presented with a dialog box very similar to the Filters one, except there is no 'Then' section; instead, everything that fits the If statements you set will be linked in the Search Folder. It's like a brilliant way of saving searches. To edit a folder, right-click on its name and select the Properties option. The great thing about this method of working is that Search Folders react in exactly the same way as ordinary folders to incoming messages, so if you have an unread message from someone you have designated 'important' (and you've set up one with the 'important' criteria), the name of the folder will be emboldened and you'll know you have something worth looking at.

One other thing that doesn't tend to get mentioned often is *Evolution's* Mark For Follow Up feature, which enables you to add a note to a mail, along with a date and time, to remind you that a follow-up is required. Simply right-click on a message in the top part of *Evolution's* mail client, select Mark For Follow Up and add a date and time. This text string will now be at the top of the message next time you look at it. There are also other flags available in this section such as Do Not Forward, Call or No Response Needed. Similarly, you can right-click on a message and convert it into a task, which is then added to the application's Tasks tab to have date, time and other details added: this is especially useful for deadline reminders.

These are the sort of tools that can really help make a project run smoothly, but now we've looked at setting up contacts and managing mail, it's time to turn to the place where these elements come together: the calendar.

USING TASK MANAGER

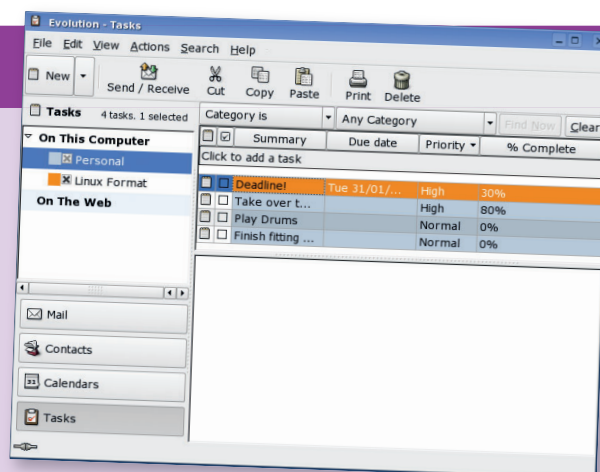
When the going gets tough the tough... make a list

When working towards a particular event, it often helps to break tasks down into more manageable sections. *Evolution's* way of doing this is based on a technology that has been around since the Babylonians: you write a list!

The section of *Evolution* that we're looking at here is the Task Manager. Essentially this is just a very good to do list; you create an entry, give it a start date, a completion date and a status dependent on the task's importance. Tasks are displayed in the list and can be

sorted dependent on the priority you've assigned them, the percentage completed or the due date.

As with other sections we've mentioned, it's possible to group tasks using colour, for easy identification, and we can also assign the task to someone within our contacts group and have the details (and any attachment from the Attachment Bar) automatically sent to them via email. To do this, right-click a task, select Assign Task and add the necessary details.

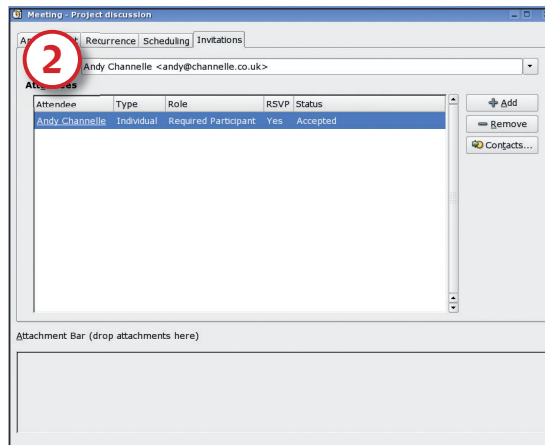
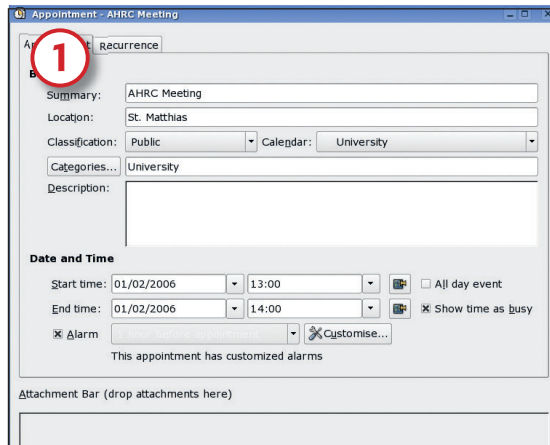


HOW TO USE A GROUP CALENDAR IN EVOLUTION

Evolution is capable of managing many calendars at once.

You can 'switch' them on or off on the left pane of the Calendar section. Earlier we defined a particular colour for each member of our project group, so it's sensible to use this colour as the

base for a Project Calendar. To create a new one, select File > New > Calendar or do Ctrl+Shift+N and give the calendar a name and colour, preferably the same one as other elements of the project.

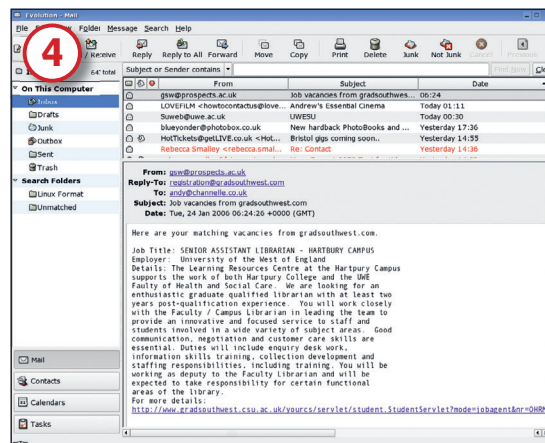
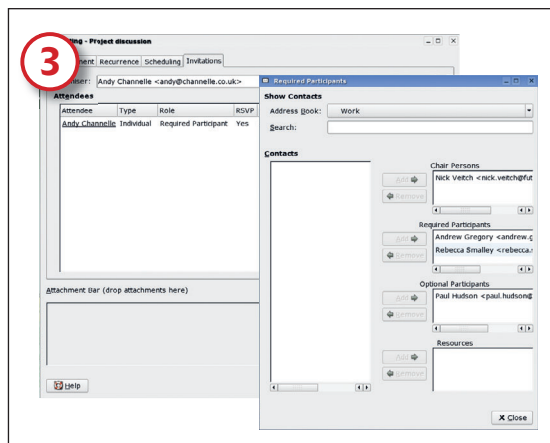


Add an event

The simplest way to use the calendar is to right-click on a day/date and select New Appointment. You'll then be able to fill in details of important dates and set alarms to go off in time to remind you of the impending deadlines. A custom alarm – it can be a pop-up, a sound or an email alert – can be set to go off at any point before the appointment. The entered date will then be displayed on the calendar and will be readily visible thanks to the colour choice you made earlier. This is fine, but project management depends upon the effective management of not just your own time, but other people's too.

Create a meeting

The next step is to set up a meeting within *Evolution*. Right-click on the appropriate date and select New Meeting. The dialog box is similar to the Appointment one, with spaces available for setting the time, date and location of the meeting and also defining alarms. However, there are some additions for inviting other participants. Select the Invitations tab at the top of the window. You will automatically be selected as the Organiser of the meeting, and each meeting can only have one of these. The main part of the window is a list called Attendees and, unsurprisingly, it is here where we define who will be attending the meeting.



Set roles

By hitting the Contacts button, we can add people from any of the Address Books set up on the computer. It is here that we also define the roles expected of each attendee by selecting a name and then using the Add and Remove arrows on each designated role. Click on OK to see the list now populated with names. There are some other things we can change here too, such as the status of the invite (whether it has been declined, accepted or whatever) and the expected role of the participant.

Invitations and paperwork

One final touch is the ability to drop documents, images or other files into the Attachment Bar at the base of the window and have them forwarded to each participant in the list. Invitations are sent as iCal attachments and so, if a respondent accepts an invite, it should automatically be added to their calendar (if they're are using *Evolution* or some other iCal capable calendar) and their response sent back to you. Changes you make to the meeting – or its cancellation – in *Evolution* will also now be sent to each participant via email so they can stay up to date. **LXF**

**NEXT
MONTH**

We'll be editing and processing audio for a range of purposes, including podcasting and video soundtracks.