

# **User's Guide**

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by Brent J. Nordquist and Eric J. Rostetter

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# Table of Contents

<b>Preface .....</b>	<b>i</b>
<b>1. Getting Started.....</b>	<b>1</b>
Your Web Browser .....	1
Logging In.....	1
The Summary Page .....	2
Getting Help .....	3
Setting Options (Preferences) .....	3
The Application Navigation Bar .....	4
Logging Out .....	5
<b>2. Mail Basics.....</b>	<b>6</b>
Introduction .....	6
The Folder View .....	6
The Folder View .....	??
Sorting Messages in the Folder .....	??
Messages Flags.....	??
How to set message flags .....	??
Checking for New Mail .....	8
Opening a Message.....	??
Email Messages.....	9
The Message View.....	??
Replying to the Message .....	??
Forwarding the Message.....	??
Deleting the Message .....	??
Printing a Message .....	10
Basic Navigation in Message View .....	11
Composing a Message .....	11
About the Header Fields.....	??
Saving a Message as a Draft.....	12
<b>3. Mail Intermediate Features .....</b>	<b>14</b>
Deleting Messages .....	??
Deleting a message from within the message view .....	14
Deleting Messages from the Folder View .....	14
Searching.....	15
Working with Attachments .....	??
Reading Attachments.....	15
Sending Attachments.....	16
Using Mail Folders.....	18
Create a New Folder .....	18
Delete a Folder.....	19
To Move a Message to a Folder.....	21
From Your INBOX (or Another Folder) .....	21
From Within the Message .....	21
To open a folder.....	22
Mail Filters .....	22

Why Use Filters? .....	23
Defining Filter Rules .....	23
Specifying When to Apply Filters .....	25
Applying Filters Shortcut .....	25
View Message Headers and Message Source .....	??
Viewing Message Headers or Mailing List Information .....	26
Viewing Full Message Source and Headers .....	26
Creating and Using a Signature File .....	26
Your E-Mail Quota .....	29
<b>4. Mail Advanced Features.....</b>	<b>30</b>
iCalendar Invitations .....	??
Using PGP .....	30
What is PGP?.....	??
Configuring PGP in Options .....	??
Enable PGP functionality? .....	??
Attach Public Key .....	30
Scan Text Bodies .....	30
Sending Messages using PGP .....	30
No Encryption .....	??
Encrypt Message .....	??
PGP Sign Message .....	??
PGP Sign/Encrypt Message.....	??
Managing Public Keys .....	31
Overview .....	??
View .....	??
Details .....	??
Delete.....	??
Import .....	32
Managing Personal Keys.....	32
Overview .....	??
Your Public Key.....	??
Your Private Key.....	??
Public Key .....	32
View .....	??
Details .....	??
Private Key .....	33
Enter Passphrase .....	??
Unload Passphrase .....	??
View .....	??
Details .....	??
Delete.....	33
Create Personal Key .....	33
Name .....	??
Comment.....	33
E-mail Address.....	34
Keylength.....	34
Passphrase .....	34

Actions .....	34
Create Keys .....	??
Import Keypair .....	??
S/MIME: Overview .....	34
What is S/MIME?.....	??
S/MIME Options .....	??
Enable S/MIME functionality?.....	??
S/MIME: Personal Keys.....	35
Overview .....	??
Import Keypair.....	35
<b>5. The Address Book.....</b>	<b>36</b>
Introduction .....	36
Opening your address book.....	36
Adding people to your address book.....	36
From within an mail message:.....	37
From the address book: .....	37
Opening an address book entry .....	38
Deleting people from your address book .....	38
Editing address book entries .....	39
Importing other address books .....	39
Importing from Microsoft Outlook .....	??
Importing vCards.....	??
Importing from another Horde Addressbook. ....	??
Importing Pine Address books .....	44
Sending a message to someone in your address book .....	45
From the address book.....	46
Using Nicknames While composing a message.....	46
Address Book Interface While composing a message .....	46
Searching in address books .....	48
<b>6. The File Manager.....</b>	<b>50</b>
Introduction .....	50
Sorting .....	50
Actions .....	50
Creating a Folder .....	50
Deleting Files and Folders.....	50
Downloading Files.....	50
Uploading Files .....	50
<b>7. The Calendar.....</b>	<b>51</b>
Introduction .....	51
Calendar Views .....	51
Day View .....	??
Week and Work Week Views.....	??
Month View .....	??
Calendar Actions.....	52
Creating a New Event.....	??
Viewing and Changing an Event .....	??
Navigating via the Goto Pop-UP .....	52

Importing and Exporting Calendars .....	52
Printing Calendars and Events.....	53
Entry Settings .....	53
Title.....	??
Calendar.....	??
Category .....	??
Location.....	??
Times .....	??
Alarms .....	53
Description .....	??
Recurring Events .....	54
Calendar Event Invitations .....	??
<b>8. Tasks.....</b>	<b>56</b>
Introduction .....	56
Why Tasks and not Calendar? .....	56
Tasks Actions .....	56
Listing and Reading Tasks.....	??
Creating a Task .....	??
Deleting a Task .....	??
Searching .....	??
<b>9. Notes.....</b>	<b>59</b>
Introduction .....	59
Notes Actions.....	59
Listing and Reading Notes .....	??
Creating a Note.....	??
Modifying an Existing Note .....	??
Searching .....	??
<b>10. Discussions.....</b>	<b>60</b>
Introduction .....	60
Navigating Newsgroups.....	60
Viewing Articles and Threads .....	60
Posting Messages .....	60
New Posting.....	60
Reply to a Posting.....	61
<b>11. Headlines .....</b>	<b>62</b>
Introduction .....	62
<b>12. Bookmarks.....</b>	<b>63</b>
Introduction .....	63
Adding bookmarks .....	??
Deleting bookmarks .....	??
Editing bookmarks .....	??

<b>13. My Account .....</b>	<b>64</b>
Introduction .....	64
Forwards.....	64
Enabling a forward .....	64
Disabling a forward .....	64
Password .....	64
Vacation.....	65
Enabling a vacation notice.....	65
Disabling a vacation notice.....	65
<b>14. SSH Shell .....</b>	<b>67</b>
Introduction .....	67
Menus.....	67
Menubar - <i>File</i> menu .....	67
Menubar - <i>Edit</i> menu.....	67
Menubar - <i>Terminal</i> menu .....	68

# Preface

The PhyNet Project focuses on creating a unified suite of web-based applications within an extensible, common framework. All applications are written using the PHP (<http://www.php.net/>) server-side scripting language.

This guide is intended for anyone using the PhyNet Portal applications -- both new and experienced users. It describes the usage of the most common applications in the PhyNet Portal suite.



# Chapter 1. Getting Started

## Your Web Browser

PhyNet Portal applications are designed to be accessible from many different types of Internet connected devices. Any web capable device should be able to use the PhyNet Portal applications in some capacity. This includes conventional web browsers, PDA devices, and WAP enabled cell phones.

However, to be able to utilize the full functionality of the PhyNet Portal applications requires a web browser (e.g. Netscape or Internet Explorer) capable of supporting JavaScript and Cascading Style Sheets. Most modern web browsers provide these capabilities.

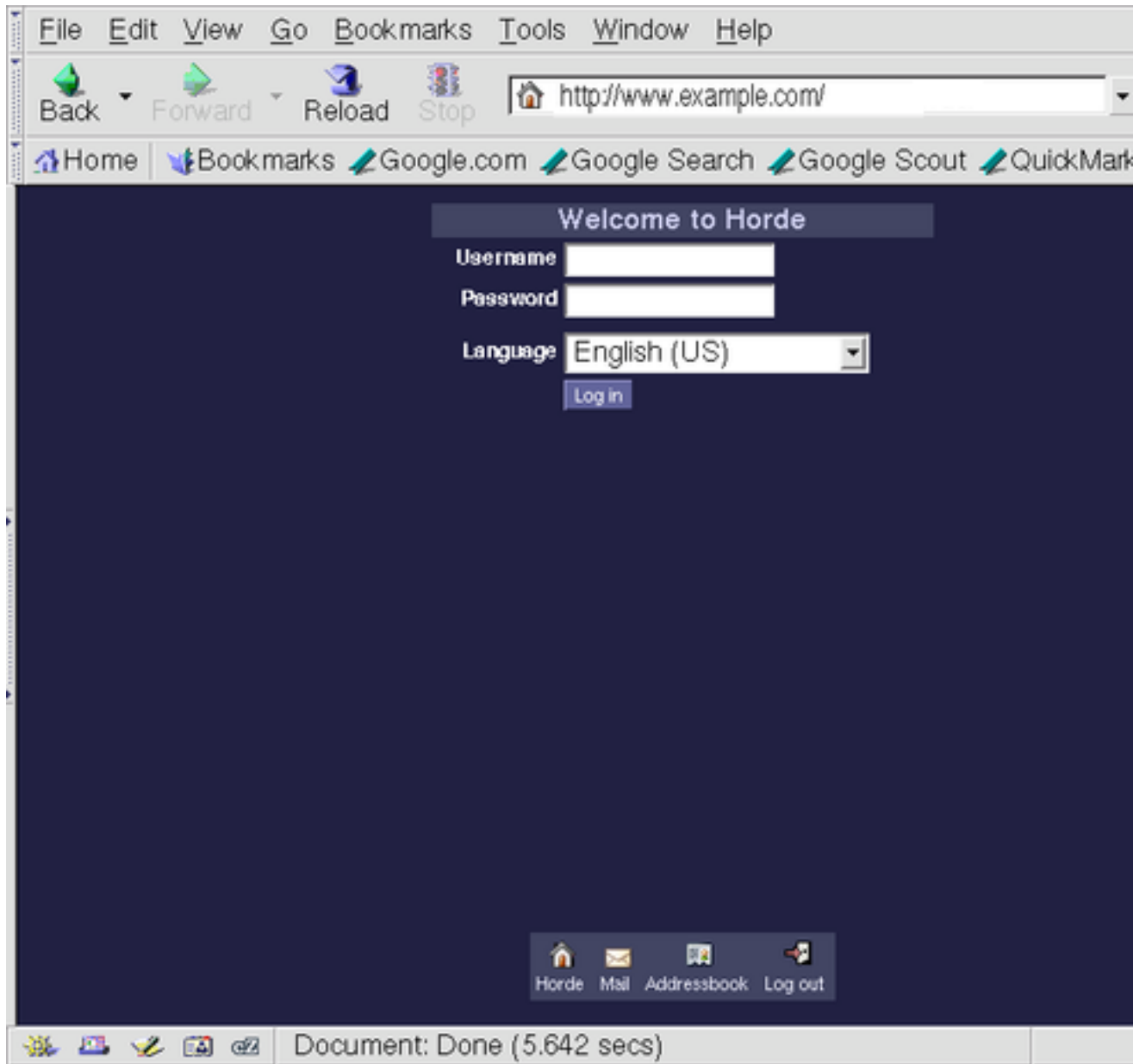
If JavaScript is not enabled, some PhyNet Portal application features may not work. Cascading Style Sheets are used for formatting and coloring the pages. It is highly recommended that you leave Cascading Style Sheets support enabled in your browser when using PhyNet Portal applications.

Even with supported browsers, you may notice minor variations in appearance depending on which web browser you use; this is normal.

Due to site specific wording, user selectable themes, differences between versions of the software, and other such concerns, the actual screens you see may be slightly different from those shown here in this document. However, things should be close enough for you to be able to follow along with this document.

## Logging In

All sessions start at the login screen. Your site may have some guest services which can be accessed without login. But most applications require a valid login before you can access them.



At the login screen, enter your username (login) and password assigned to you by your computer administrator into the appropriate boxes. You may select your preferred language from the list of available languages here if you wish.

There may also be other options on the login screen, such as specifying servers to connect to, or other server specific details.

Once you've filled in the required fields, click the **Log in** button to log in.

## The Summary Page

After logging in, you'll be presented with your chosen initial page. By default, this is a summary page

which provides a quick summary of all your important PhyNet Portal application information. For example, it might show how many new email messages you have in your INBOX (or other folders you select), upcoming events on your calendar, tasks from your tasks lists, headlines from selected news services, current weather, stock quotes, and so on.

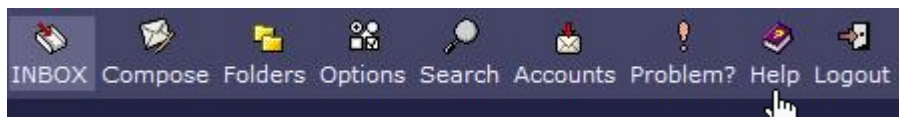
Many summary page items also have quick shortcut icons which allow you quickly access common functions without having to go to the specific application first. For example, there may be such shortcut icons to compose a new mail message, create a new calendar event, task or memo, etc.

The contents of the summary page are customizable via the Options settings. For example, you can choose which items to include on the summary page as well as in which order they are shown. You can also set a refresh interval for the summary page.


You can change which page is your initial page at login, for example setting your initial page to be your email or calendar. However, most people find the summary page useful once they have customized it to their interests.

## Getting Help

PhyNet Portal uses a simple help system to provide general as well as context sensitive help. Most pages will have a help icon in the menu bar at the top of the page. For example, the email application menu bar might look like the following.



Clicking on the help icon will create a window showing all the available help topics for the current application. The window is laid out very simply, with *List Help Topics* located in the upper left corner of the window, and *Close Help* in the upper right corner. *List Help Topics* allows you to view all the available topics. Clicking on a topic heading in the list will show the help information for that topic.



In addition to the help icon in the application menu bar, there may also be small help icons within the pages for context sensitive help. These icons look like small  question marks inside a box and are located adjacent to the object they provide help on, as shown below.



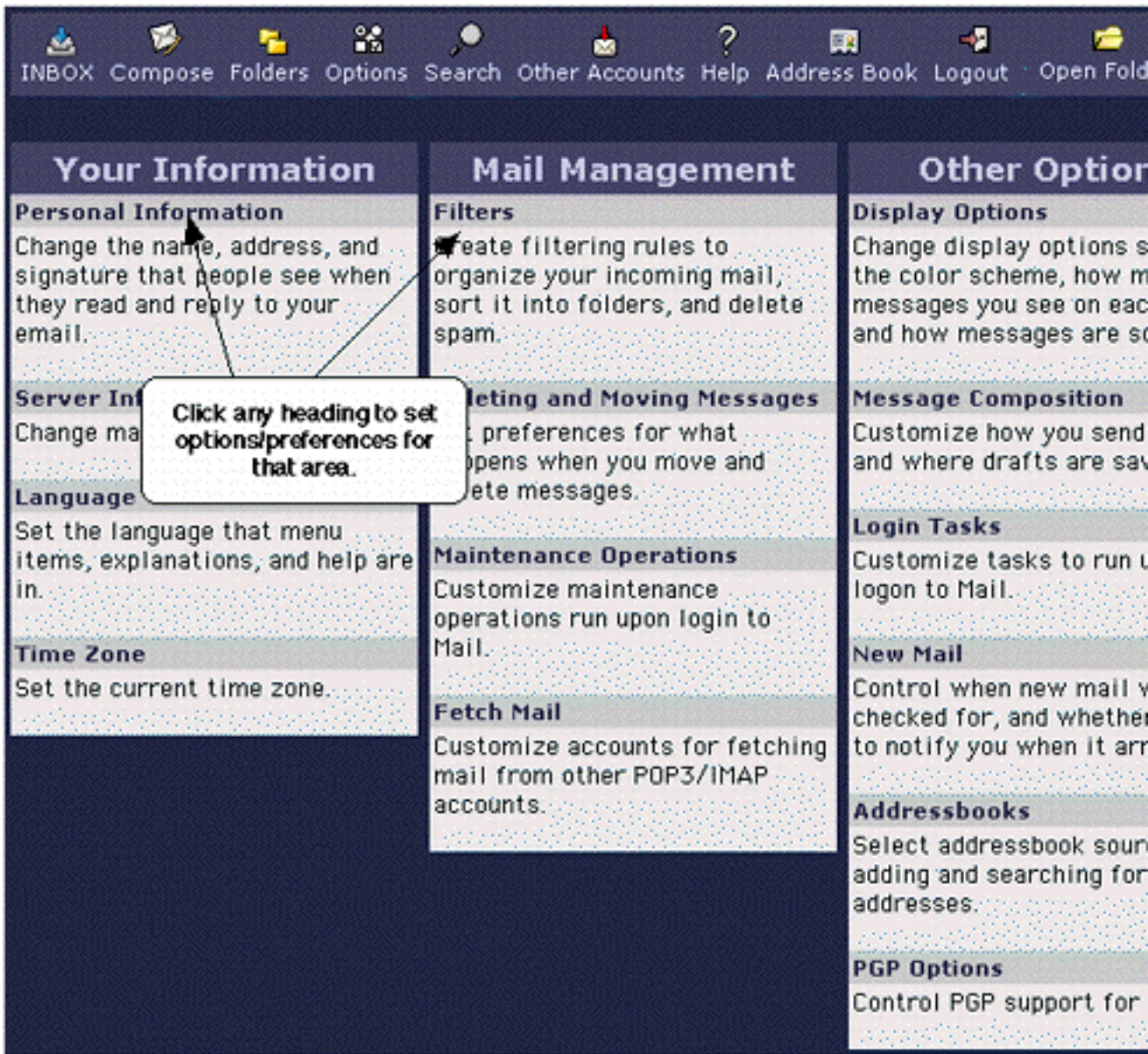
Clicking on one of these icons will take you to the same help file as the help icon in the menu bar, but it will take you directly to a specific help topic rather than an index of the available topics.

## Setting Options (Preferences)

You can set a number of options -- or preferences -- in PhyNet Portal to customize how PhyNet Portal applications look or act. There are both global options, set in the PhyNet Portal options menu, which apply to all PhyNet Portal applications, as well as application specific options which apply only to an individual application.

To modify your preferences, click on the  **Options** icon in the top menu bar. An Options menu for that application will be displayed. For global options, use the  **Options** icon on the PhyNet Portal summary page.

Once in an options page, click on an option heading to change the options for that section. For example, the follow shows what the options page for the email application looks like.




## The Application Navigation Bar

At the bottom of the web page is the application navigation bar. Click on the icons on the navigation bar to switch between the PhyNet Portal applications.



## Logging Out

To protect your email messages, calendar, etc. you should always log out when you are finished using the PhyNet Portal applications. This is especially true if your web browser will be left running. To log out, click on the  **Logout** icon located near the bottom right corner of the browser window.



If your login session is idle for a long period of time, you may encounter a session timeout which logs you out. This is a security feature which may help protect you if you forget to log out. However, you should not depend on this mechanism to log you out. You should always log out when you are finished.

For extra security, especially when using public or shared machines, it is a good idea to exit your browser completely after you log out.

# Chapter 2. Mail Basics

## Introduction

Email is used to send and receive electronic messages to and from people all over the world. It is a fast and effective means of communicating in the written form. Email is convenient as the sender and recipient(s) need not be using their computers at the same time -- recipients may choose to access the messages at any time which is convenient to them.

Mail is the PhyNet email application. It provides a full-featured, robust email system which can be accessed from almost anywhere you have access to the web. It supports most standard email client operations such as multiple accounts, multiple folders, attachments, spell checking, and address book support.

Due to the size and complexity of the Mail email application, we've broken the material up into three separate chapters.

### Mail Basics

The basic functionality you need to get started. Covers how to use Mail, how to read and send email, how to print messages, how to delete messages, and how to work with draft messages.

### Mail Intermediate Features

This section covers more advanced functionality you may wish to use after you get used to using Mail, or if you are already an experienced email user.

Topics covered here include more advanced deleting of messages, searching, attachments, folders, mail filters, viewing message headers and message source, and signature files.

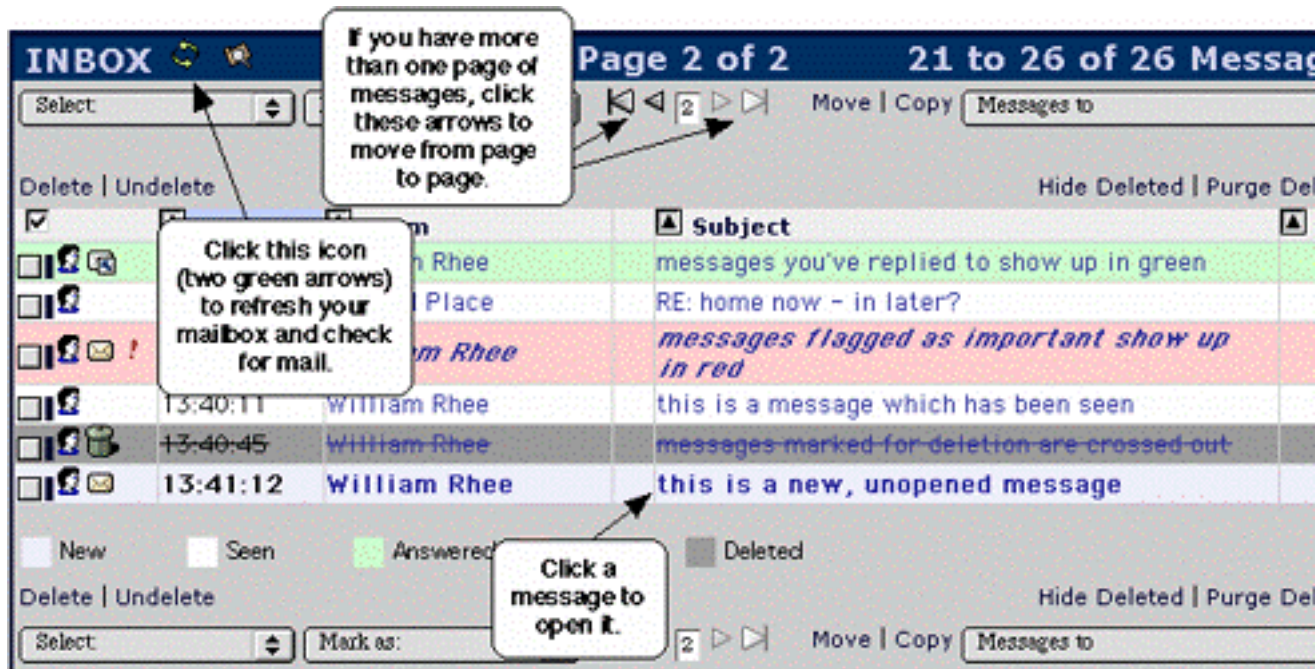
### Mail Advanced Features

This covers advanced topics such as PGP and S/MIME support and iCalendar support.

## The Folder View

### The Folder View

When you first enter Mail, the contents of your INBOX will be displayed. (You will see this same "folder view" of Mail for every email folder you open.) If a folder has more than one page of email messages, it will open to the first page that contains a message you haven't read yet. You can use the navigation arrows at the top-center of the list to move from page to page.



## Sorting Messages in the Folder

You can sort your messages by date, who they are from, size, subject, and thread. Click the heading (for example, "Date" or "Subject") by which you wish to sort; the heading will change color to indicate the current sort order. You can reverse the sorting direction using the triangle icons (▲ and ▼) next to the heading (for example, to show newest messages first instead of oldest, when sorting by date).







Sometimes you may get several messages which are replies to a previous message. A string of successive replies to the same original message forms what is called a thread. It is often useful to view messages via such a threaded view, so that you can read (or skip) all the messages of each subject in sequence. This is especially useful if you want to reply to a message, as threading lets you easily check if someone else has already replied with the same information.

You can also change some default sorting options using the Mail *Options* menu.

## Messages Flags

Message flags at the left side of the screen provide information about each message. In addition, messages are color coded to indicate their status. The colors may be changed via different themes which are available, but don't worry as there is a color legend at the bottom of the message list to help you identify the meaning of colors. The table below explains the most common message flags, and shows the default color scheme for messages.

Message Flag	Message Color Bar	What It Means


Message Flag	Message Color Bar	What It Means
	blue	<b>Unseen (new) message:</b> one that you have not yet opened and read.
(no flag)	white	<b>Seen message:</b> one that you have opened at least once.
	green	<b>Answered message:</b> one that you have replied to.
	pink	<b>Important message:</b> one that you have flagged as important.
	dark gray	<b>Deleted message:</b> one that you have marked for deletion.
		<b>Personal:</b> the message was addressed to you as an individual rather than to you as a member of an mail group.
		<b>Draft message:</b> one that you have saved to work on and send later.

### How to set message flags

1. Select a message by clicking the checkbox to its left.
2. Select the message flag you want to use from the **Mark as** pop-up menu.

### Checking for New Mail

There are multiple ways to check for new (incoming) mail. Some of these are listed below.

- Click the  **Refresh** icon (two green arrows going in a circle) located at the upper left of the message display.



- Click your browser's **Reload** or **Refresh** button.
- Configure the applications options to automatically check for new mail on a regular basis.

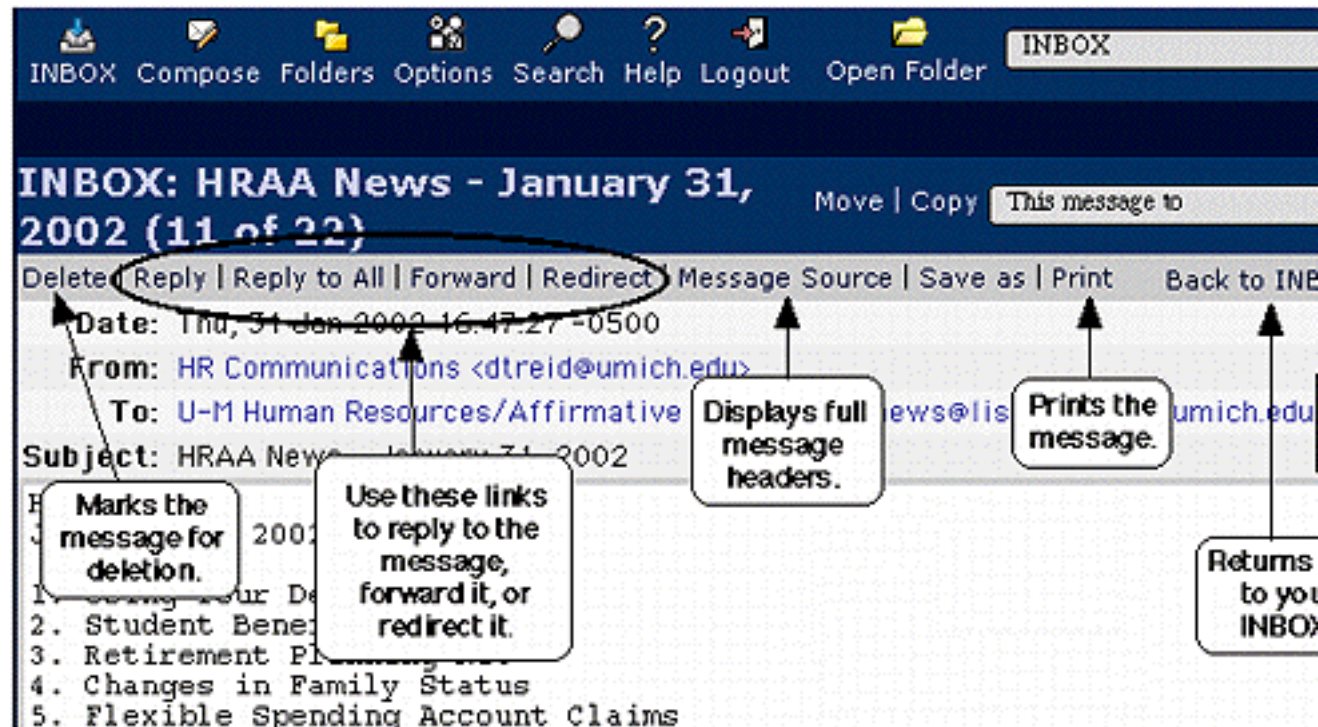


## Opening a Message

To open (display) a message, click the subject or sender name for the message you want to view. A new window will open containing the details of the message and a text menu of common actions.

## Email Messages

### The Message View



You can use the navigation arrows at the top right (also duplicated at the bottom right) to move to the previous or next message in the folder. Just to the left of the arrows is a link to return to the Folder View of your INBOX.

### Replying to the Message

To reply to the message you're reading, click the *Reply*, *Reply to All* or *Reply to List* link at the top of the message. *Reply* replies only to the person who sent the original message. *Reply to All* replies to the original sender *plus* anyone else who was included in the original message. *Reply to List* appears only if the message is from a compliant mailing list, and using it will reply to the mailing list posting address only.

A new message window will open with the recipients and subject already filled in for you. Optionally, the original message text will be quoted in the body of the message. Enter your message text, and click

the **Send Message** button to send the reply. See the following section on "Composing a Message" for more information on how to compose replies.

## Forwarding the Message

To forward the message you're reading to another person, click the *Forward* or *Redirect* link at the top of the message. *Forward* sends the message with your email address as the From address (so it will look like it came from you). A new message window will open with the subject already filled in for you. The original message text will be in the body of the message, and you can add additional message text. When ready, click the **Send Message** button to forward the message. See the following section on "Composing a Message" for more information on how to compose forwards.

*Redirect* simply "bounces" the message to the new person with the original From address intact (so it will look like it came from the original sender). *Redirect* does not allow you to make changes or additions to the message. A new message window will not open; you will simply be prompted for the email address you wish to redirect the message to. Press the **Redirect Message** button when ready to send the message.

## Deleting the Message

To delete the message you're reading, click the *Delete* link at the top of the message to mark it for deletion.

Deleting can be configured to work in two different modes -- delete mode and trash mode.

In delete mode, the messages are marked for deletion. Note that they are only marked for deletion, and not physically deleted, until you "purge" your deleted messages. Until purged, they will still appear in message listings, and you can still revisit them and in some cases even "undelete" them. If you don't want to see the deleted messages in your message lists, you can use the *Hide Deleted* link to conceal them from view.

In trash mode, the messages are moved to a trash folder when deleted. Again, they are not actually deleted, only moved to the trash folder, until you empty your trash folder. You can "undelete" them by moving them out of the trash folder and into another folder, if desired. You can manually empty the trash folder, or you can schedule it to be emptied automatically at scheduled times.

## Printing a Message

When viewing a message, you can easily print the contents of the message using the *Print* link. You should print the message this way rather than using the browser print function, as the browser's print function will print the entire web page rather than just the message contents.

1. Open the message you want to print.
2. Click the *Print* link in the text menu at the top of the message.
3. The message will open in a new window so you can print it.

Depending on the web browser and operating system you use, your browser's print dialog box may automatically open for you. If it does not, pull down the browser's **File** menu and choose **Print**.

## Basic Navigation in Message View

In the text menu at the top and bottom of the message are three navigational links. One link is used to return you to the folder which contains the current message. For example, if you are reading a message from your INBOX, then the link would read *Back to INBOX* and using it would return you to the folder view of your INBOX.

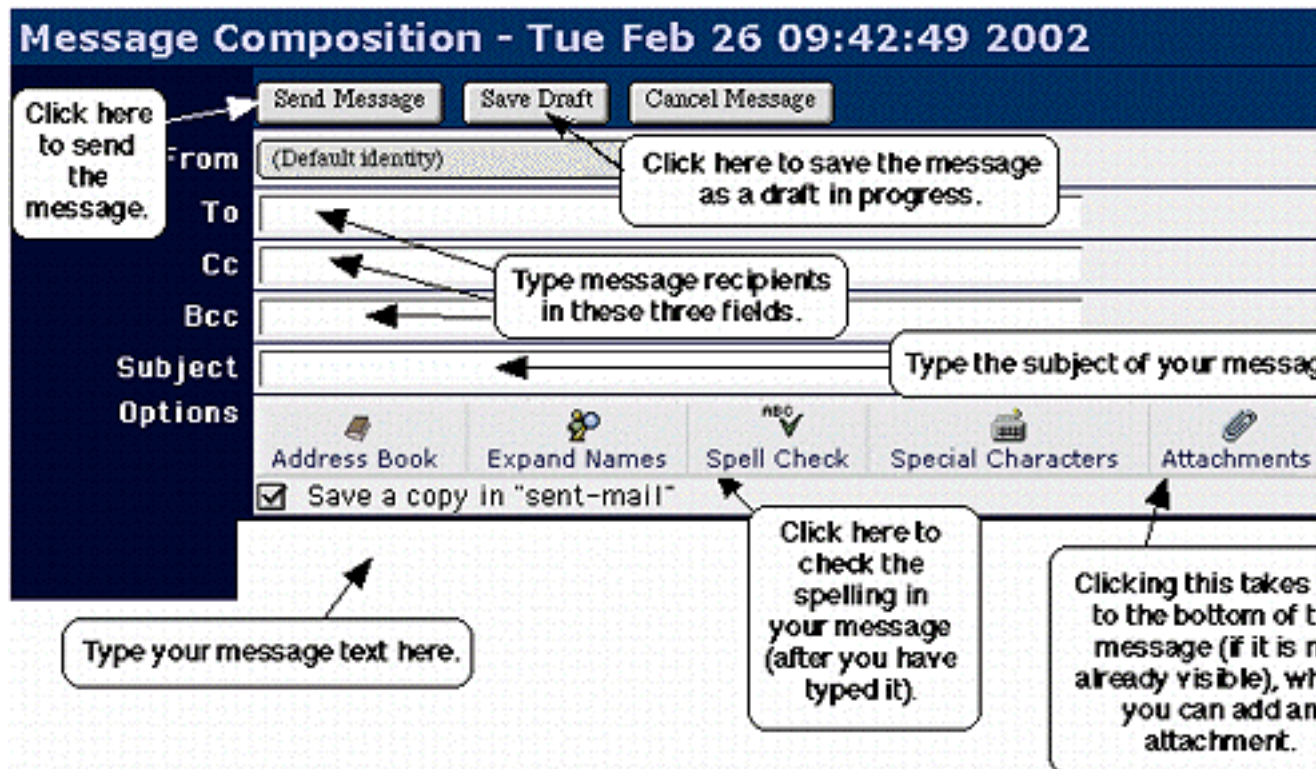
The other two links are small arrow icons. Clicking the left facing arrow will take you back to the previous message in the current folder. Clicking the right facing arrow will take forward to the next message in the current folder. What the previous and next messages are will of course depend on the current sorting scheme for the folder.

## Composing a Message

Click the Compose menu icon in the top menu bar to open a new message composition window.



A new message composition window will open. Use this window to compose new messages.



At the top of the message composition window are the "header" fields. This is where you set who are sending the message to and what the subject of the message is. If sending to multiple people, separate the addresses with commas (not semi-colons or spaces -- these will not work properly).

Enter the text of your message in the space provided. When finished click on the **Send Message** button.

## About the Header Fields

There are several addressing fields which contain email addresses for the message recipients. These fields differ in logical importance and in concealment purposes, but otherwise function the same. The fields are:

*To:*

The *To:* field specifies direct recipients of the message. These are people to whom the message is directed. All the recipients will see these addresses in the *To:* field of the message.

*Cc:*

The *Cc:* field specifies recipients who should receive a "carbon copy" of the message. All recipients will see these addresses listed in the *Cc:* field of the message.

*Bcc:*

The *Bcc:* field specifies recipients who should receive a "blind carbon copy" of the message. This is similar to the *Cc:* field, except that these addresses will not show up in the other recipients messages. In this way, you can send a copy to someone without the other recipients knowledge.

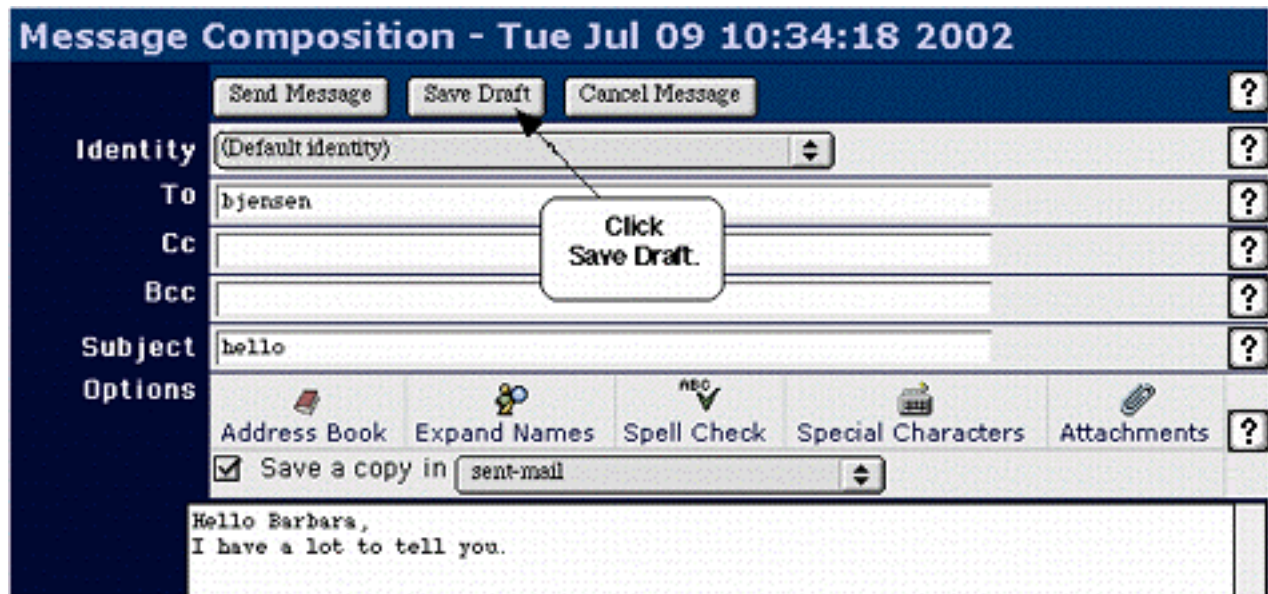
The last header field is the *Subject:* field. While a subject line is not required. A subject line allows the recipient to know what the message is about without having to open and read the message. It also allows for easy recognition, threading, searching or filtering of messages. Good subjects are as short and concise as possible, conveying the contents of the message in as few words as possible.

## Saving a Message as a Draft

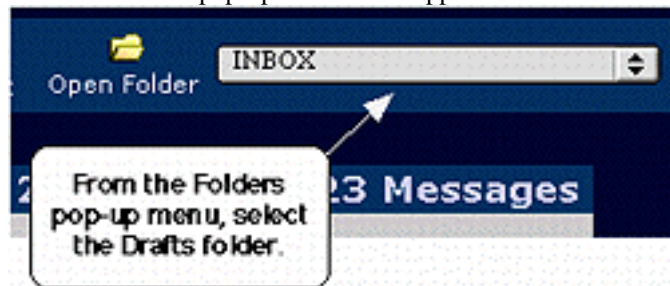
You can save a message you are composing as a draft, so you can finish and send the message at another time. The message is saved in your *Drafts* folder, ready for you to resume at your convenience.

**Tip:** If you specify a meaningful subject on messages before you save them as a draft, it will be much easier to find the correct message later when you want to resume it.

1. Begin composing your message. When you are ready to stop, click the **Save Draft** button.



- From the folders pop-up menu in the upper left corner of the folder view, select the *Drafts* folder.



- The *Drafts* folder will open. To open the draft message, click its subject or sender.
- To resume working on the message, click on the **Resume** link.



# Chapter 3. Mail Intermediate Features

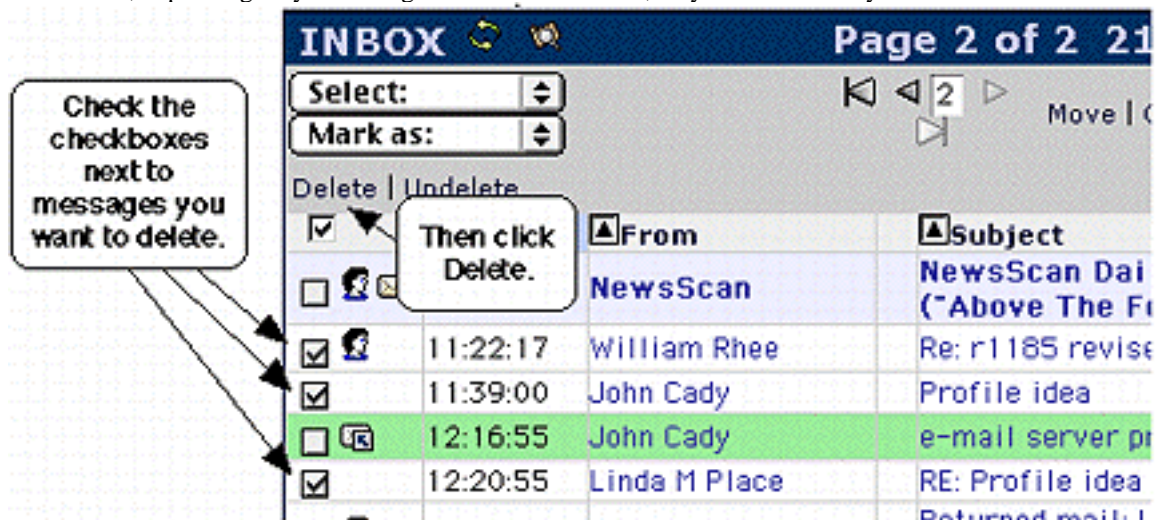
## Deleting Messages

### Deleting a message from within the message view

1. Open the message you wish to delete.
2. Click the *Delete* link in the text menu at the top of the message to mark it for deletion. Depending on how your email is configured, the message will either be marked for delete, or moved to your trash folder.
3. To completely remove the message from your mailbox, return to the folder view, and click on the *Purge Deleted* or *Empty Trash* link in the text menu (which one appears depends on your email configuration. It is located on the right-hand side of the window both above and below your list of messages).

### Deleting Messages from the Folder View

1. Click the checkbox to the left of each message you wish to delete. You can select as many messages as you want, as long as they are all on the same display page.
2. Click the *Delete* link. (There are *Delete* links at both the top and bottom of the folder view.) The messages will be marked for deletion; they will be either crossed out in the display or moved to your trash folder, depending on your configuration. In either case, they will remain in your mailbox.



3. To completely remove the message from your mailbox, return to the folder view, and click on the *Purge Deleted* or *Empty Trash* link in the text menu (which one appears depends on your email configuration. It is located on the right-hand side of the window both above and below your list of messages).

**Tip:** You can use the **Select** pop-up menu to select (that is, check the checkbox next to) all the messages flagged a particular way. For example, you can select all the seen messages, all the important messages, or all the "not personal" (directed to you as a group member rather than as an individual) messages.

## Searching

You may search for messages from your folders using different search criteria. This provides a quick and easy way to locate messages.

1. Use the **Search** menu icon at the top of the page to bring up the search form.
2. Enter text in any appropriate fields to specify the search criteria. You may search on a single field, or multiple fields. You may leave fields blank if you don't want to search based on that field. For example, if you wish to search for all messages from a particular individual, you would need to fill in the *From* field with that individual's address, but not the *To*, *Cc*, *Subject*, or *Body* fields.
3. Optionally choose the message flag(s) to further refine your search criteria.
4. Optionally choose the folder(s) to search within for your messages.
5. Click on the **Search** button to execute the search.


If any messages matched your search criteria they will be returned in a *Search Results* folder view.

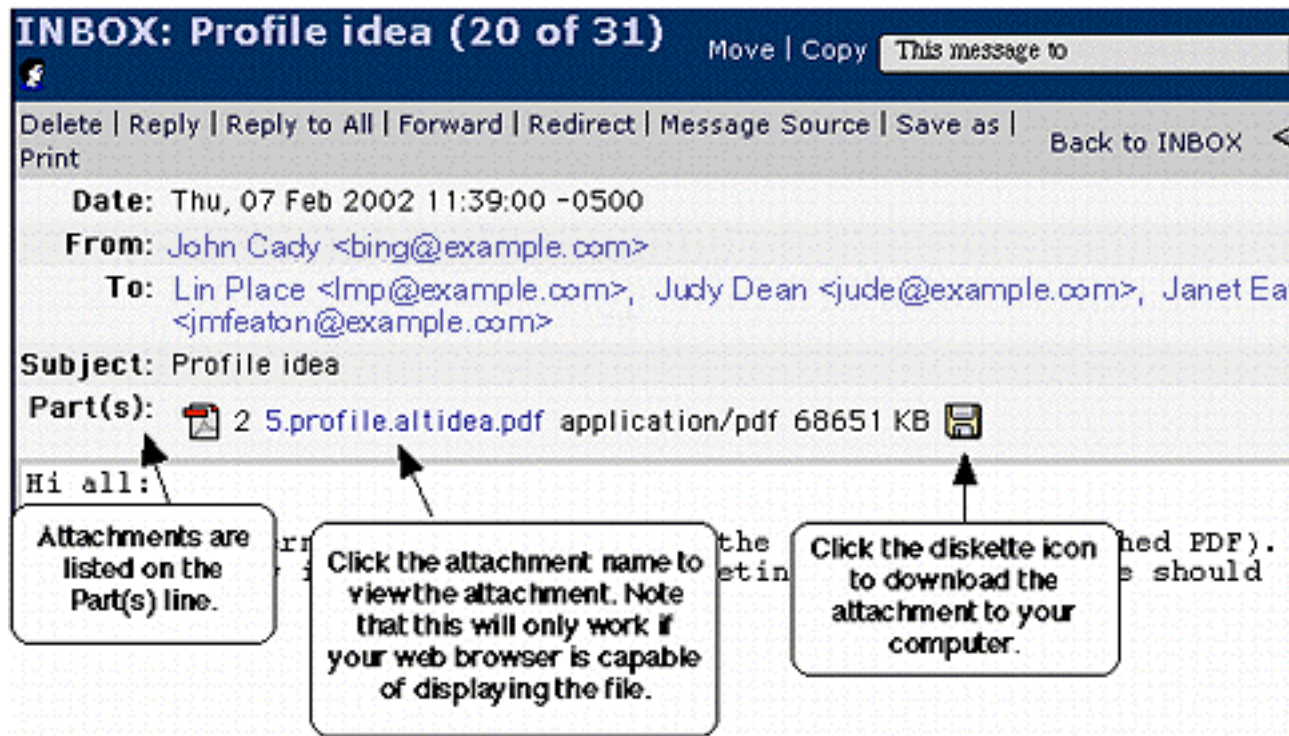
## Working with Attachments

### Reading Attachments

Messages with attachments may be identified as containing attachments in your INBOX via a paper clip icon when viewing your INBOX.

When viewing a message, attachments are listed on the Part(s) line of a message.

- Click the attachment name to view the attachment from within your web browser. Note that this will only work if your web browser is capable of displaying the file. (For example, most web browsers can display html and jpeg files.) Some versions of some web browsers will download the file instead of displaying it whether they are capable of displaying it or not.
- Click the download icon  to download the attachment file to your computer, where you can use the appropriate application to open and read the file. (For example, if the file is a Microsoft Word file, you can use Word to open the downloaded file.) Some versions of some browsers might display rather than download the file.

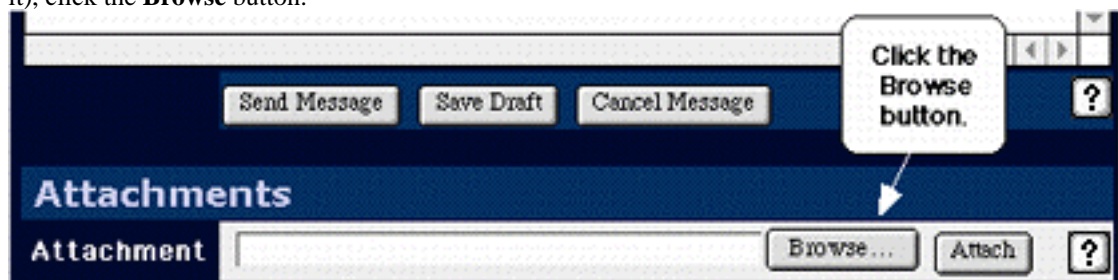


### Warning

Attachments may contain viruses. We recommend that you not download or open unsolicited attachments. Also, we recommend that you keep up-to-date antivirus software installed on your computer.

## Sending Attachments

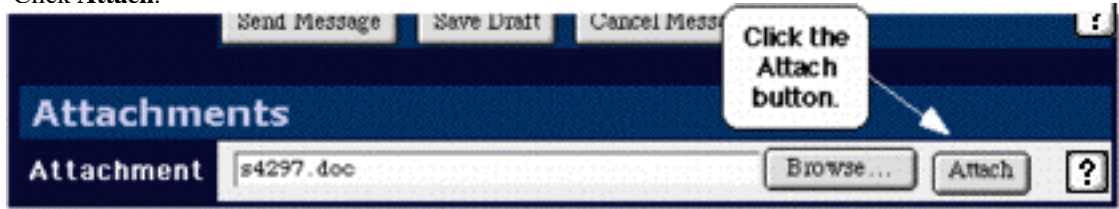
1. Compose your message as you normally do.
2. In the *Attachments* section at the very bottom of the message (you may need to scroll down to see it), click the **Browse** button.



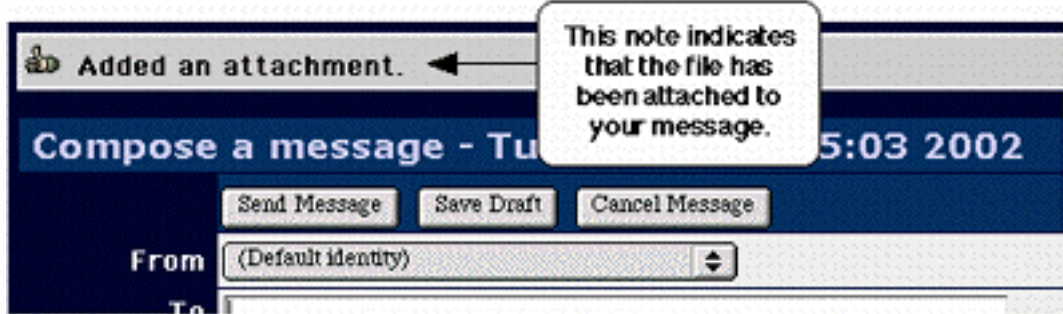
3. Navigate among your files, select the file you want to attach, and click **Open**. The file pathname (if you use a Windows or unix computer) or the file name (if you use a Macintosh computer) will be listed in the **Attachments** field.



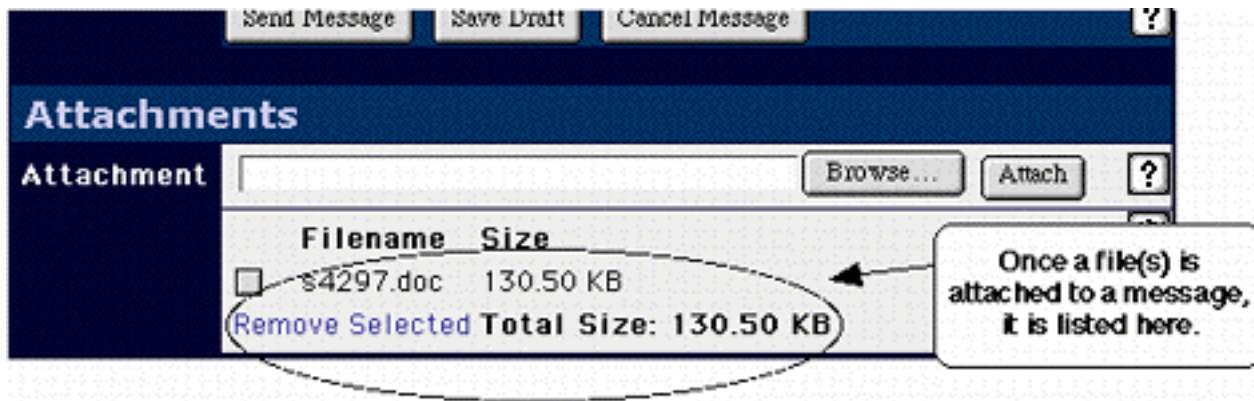
4. Click **Attach**.



5. At the very top of the web page, look for confirmation that the file has been attached successfully:

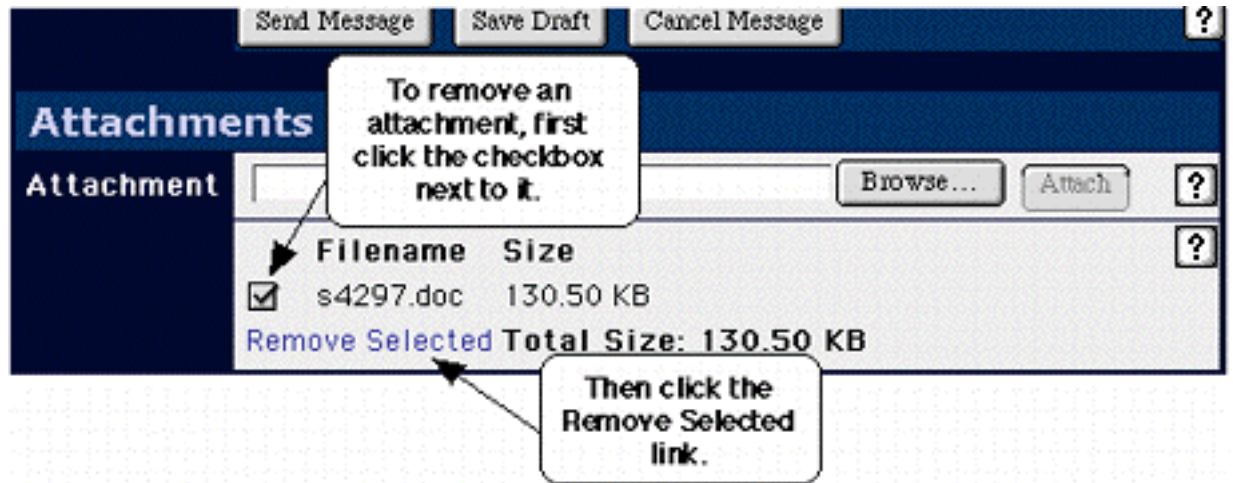


Also, the attachment will be listed below the **Attachment** field at the bottom of the message.



6. Repeat Steps 2-5 to add more attachments.

To remove an attachment, first select it by clicking the checkbox next to it, then click the **Remove Selected** link.

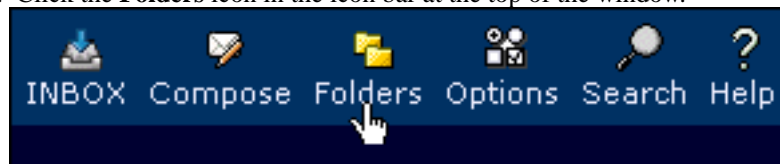


## Using Mail Folders

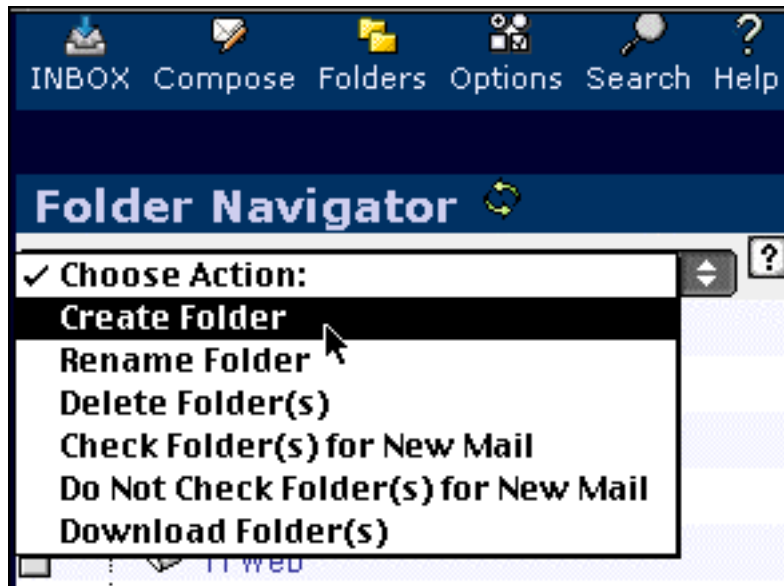
Your incoming mail goes to your INBOX. You can keep all your mail there, or you can create additional folders to organize your mail. Because the folders you create with the PhyNet Portal are stored on your mail server, they are also available to you if you use another folder-capable mail client like Pine, Eudora or Outlook.

### Create a New Folder

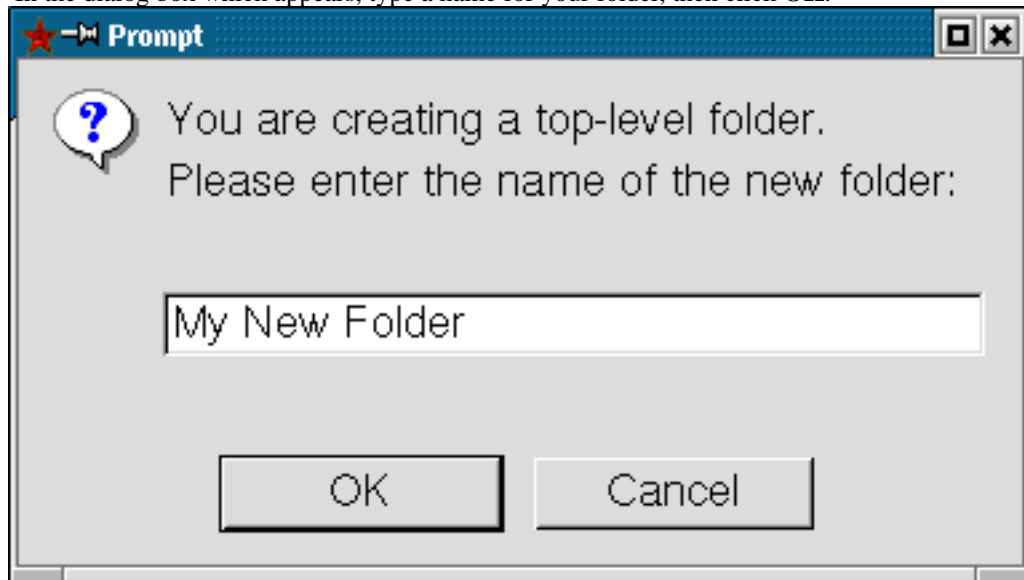
1. Click the **Folders** icon in the icon bar at the top of the window.



2. From the **Choose Action** selection box, select **Create Folder**.



3. In the dialog box which appears, type a name for your folder, then click **OK**.



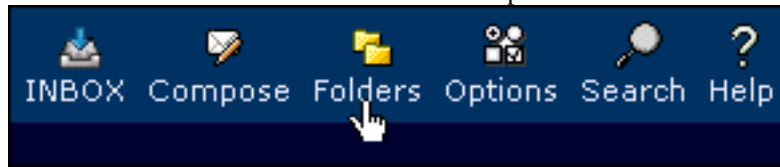
The new folder will be created and added to your list of folders.

### Delete a Folder

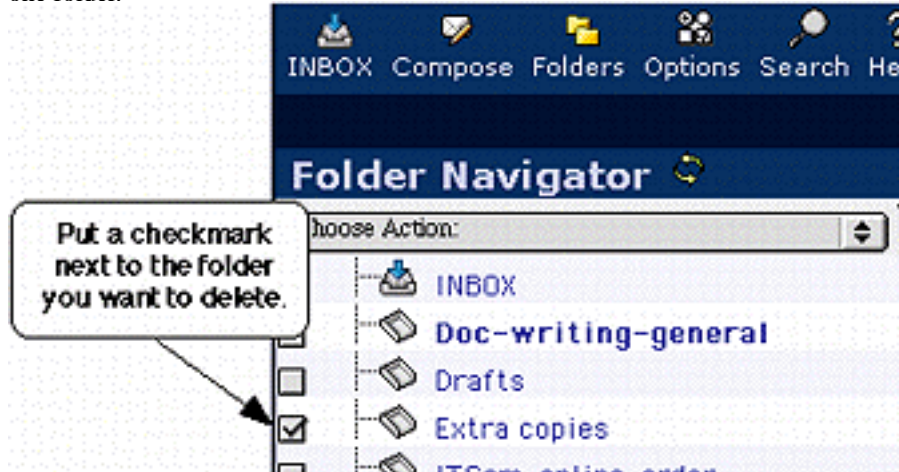
**Warning**

When you delete a folder, you delete the folder and all the messages inside it. Once the contents of a folder are deleted, they cannot be retrieved.

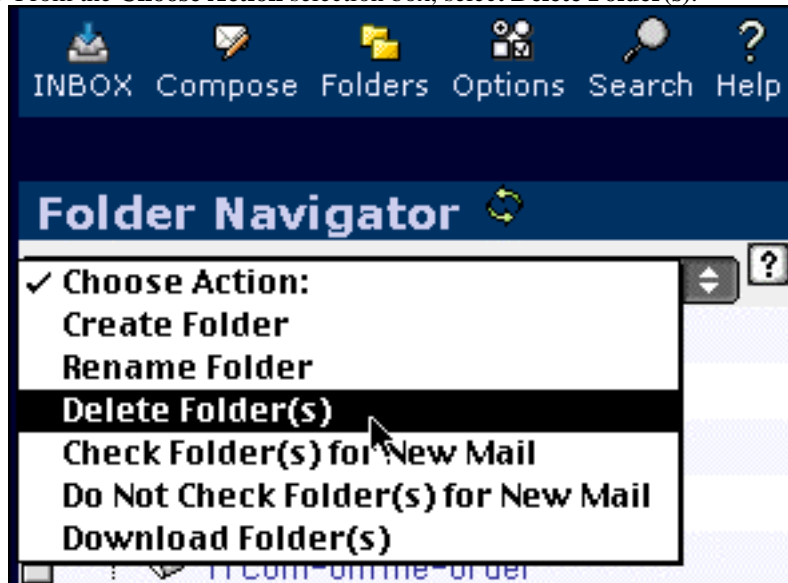
1. Click the **Folders** icon in the icon bar at the top of the window.



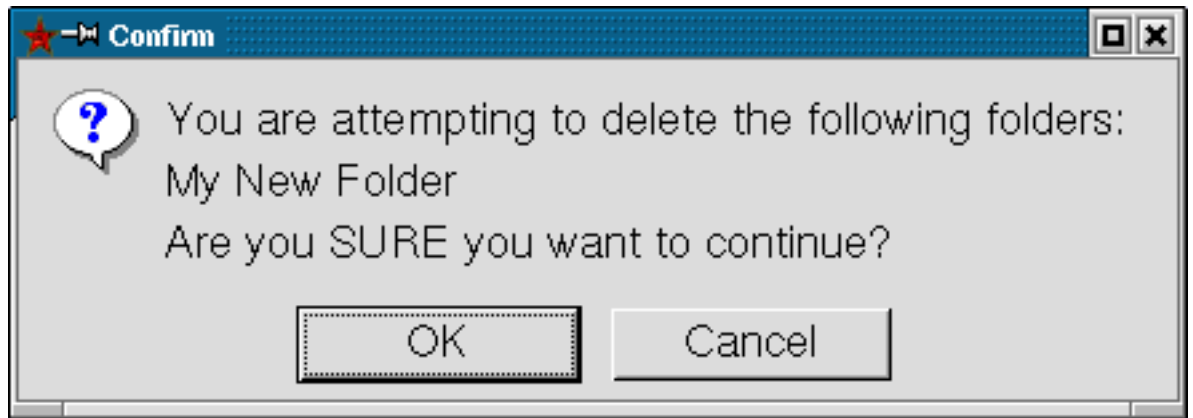
2. Click the checkbox next to the name of the folder(s) you want to delete. You can select more than one folder.



3. From the **Choose Action** selection box, select **Delete Folder(s)**.



4. In the dialog box asking if you are completely sure you want to delete the folder, click **OK**.

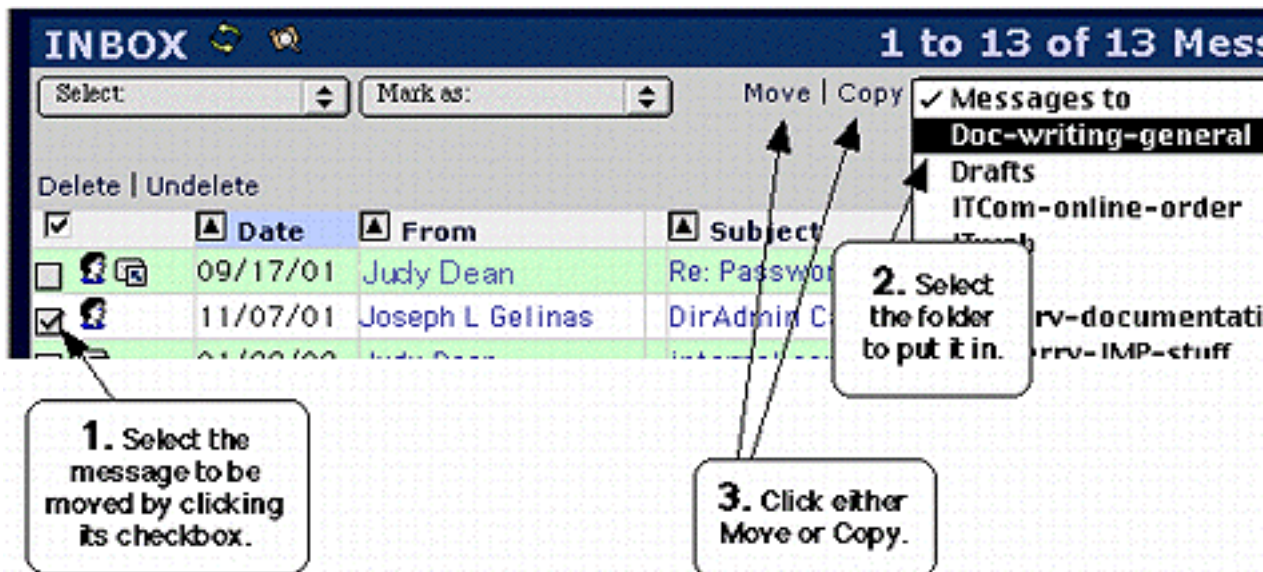


The folder, and everything inside it, will be deleted.

## To Move a Message to a Folder

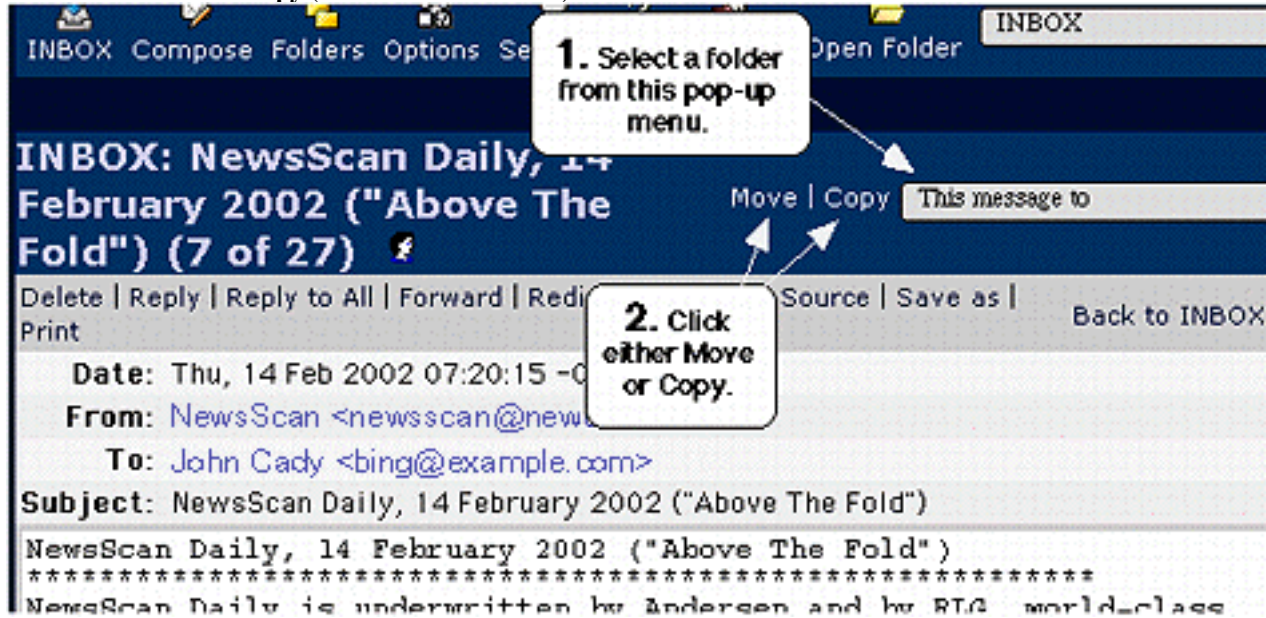
### From Your INBOX (or Another Folder)

1. Check the checkbox next to the message that you want to move.
2. From the **Move|Copy** pop-up menu, select the folder to which you want to move the message.
3. Click either **Move** or **Copy** (to the left of that menu).
  - **Move**. Moves a copy of the message to the folder you selected and marks the copy in the current folder for deletion.
  - **Copy**. Copies the message to the folder you selected, leaving a copy in the current folder.



### From Within the Message

1. From the **Move|Copy** pop-up menu, select the folder to which you want to move the message.
2. Click either **Move** or **Copy** (to the left of that menu).



### Caution

All your mailboxes are stored on the mail servers. Moving a message from one mailbox to another will not reduce the amount of space you are using or keep you from going over quota if your mailbox is full. (See the Section called *Your E-Mail Quota*)

### To open a folder

From the **Folders** pop-up menu (in the upper right corner of the page), select the folder you want to open. In most browsers, that folder will open as soon as it is selected. If it doesn't open automatically, click on the **Open Folder** icon next to the selection list.



## Mail Filters

You can filter your mail by automatically deleting or filing messages with certain characteristics which you specify. You do this by defining filter rules (for example, deleting all messages from a particular address) and then specifying when to apply those rules (for example, every time your INBOX is refreshed).

**Note:** These filters only get activated when you use the PhyNet Portal applications. There are other, better options for filtering mail that will filter all your mail and work with all your mail software. These are called server side filters. We don't yet have any documentation for server side filters.

### Why Use Filters?

- **To organize your incoming mail:**
  - You might, for, example, have all the mail from a listserv that you subscribe to filed in a folder. You can then review those messages at your leisure without them cluttering up your INBOX.
  - You might, for example, have all the mail from one of your professors filed in a folder for easy reference.
- **To reduce your exposure to SPAM**
  - You might, for example, have all the mail with the word "advertisement" deleted.
  - You might, for example, have all the mail from a particular SPAM sender deleted.

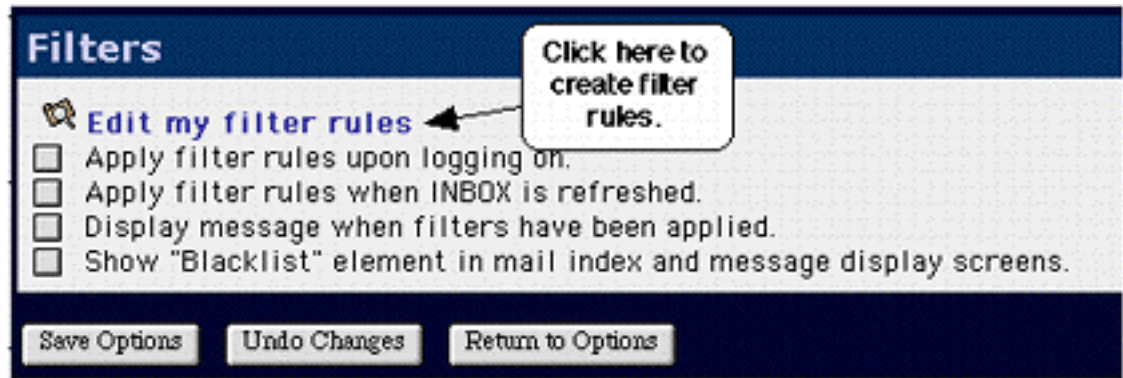
**NOTE:** If you set a filter to delete certain mail, that mail will be marked for deletion, but will remain in your mailbox until you purge deleted messages.

### Warning

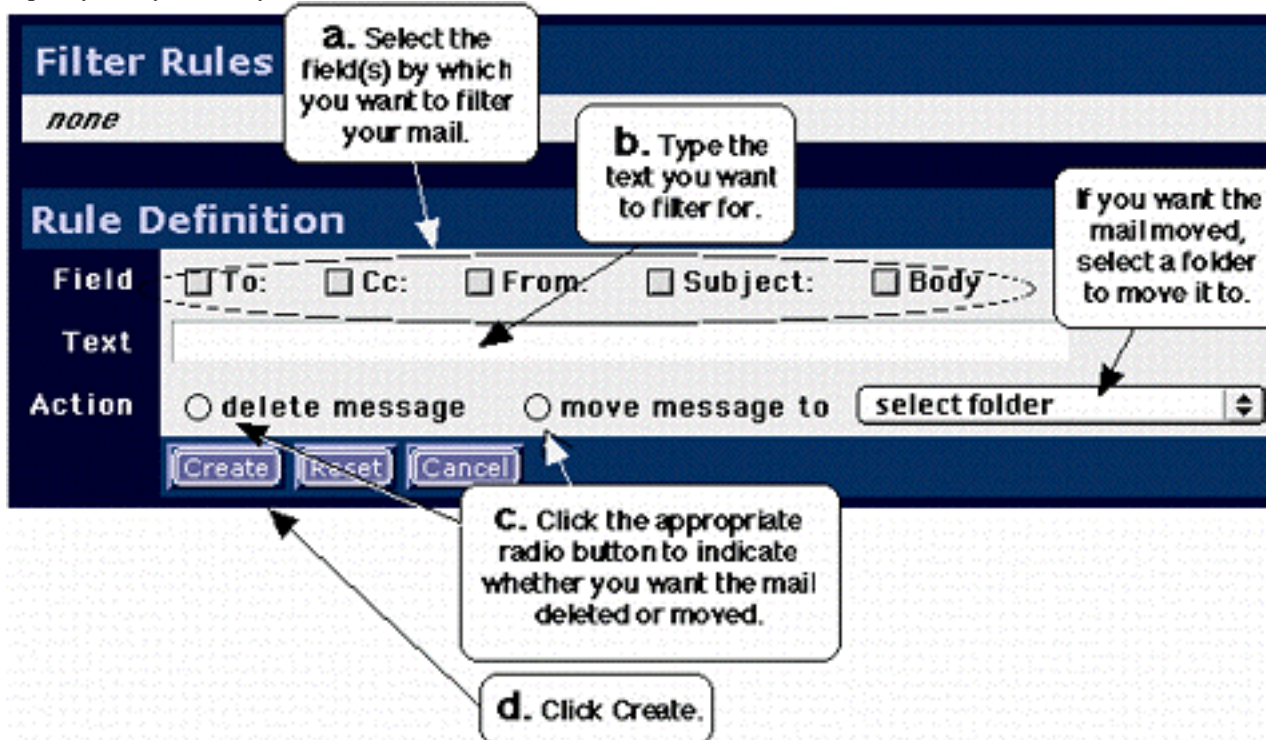
Define your filter rules carefully to avoid inadvertently deleting or misfiling important mail.

### Defining Filter Rules

1. In the icon bar at the top of any page, click **Options**.
2. In the **Mail Management** column, click **Filters**.
3. Click **Edit my filter rules**.



4. Specify how you want your filter rule to work.

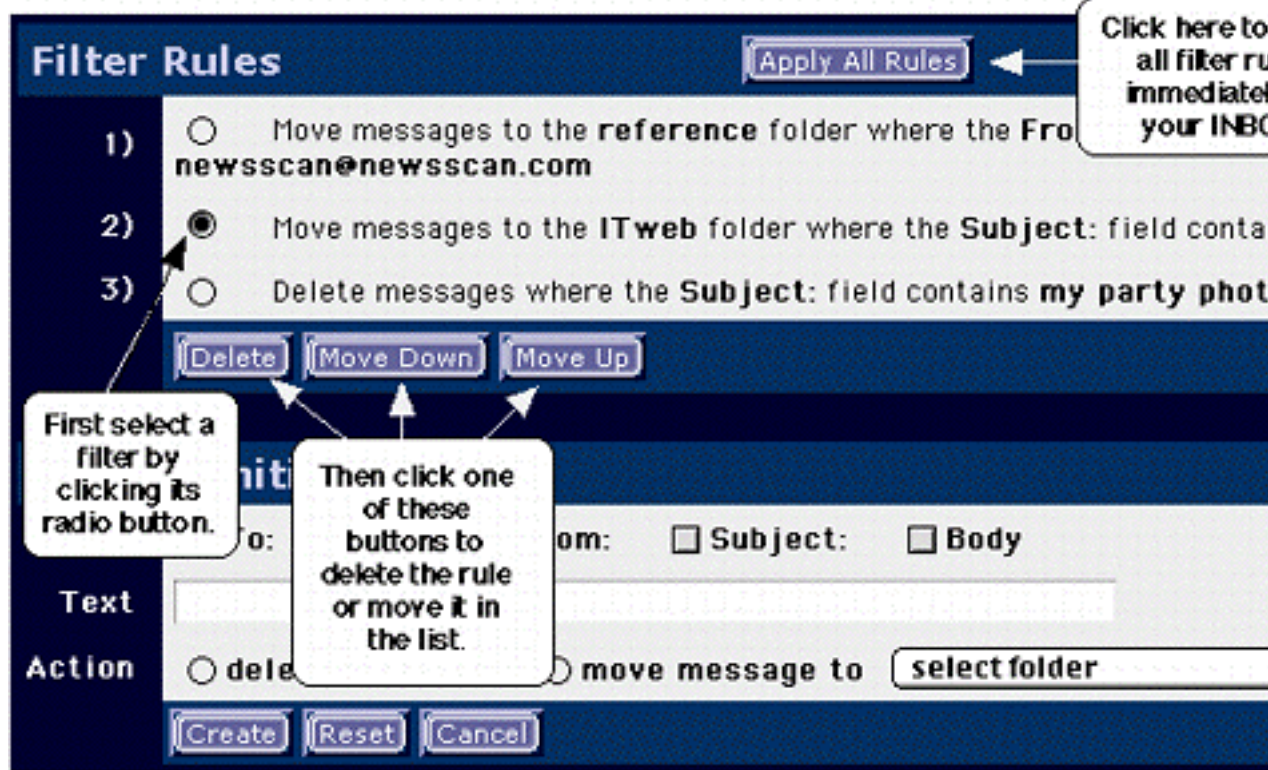


- Check the checkbox(es) next to the field names you want to filter by. If for example, you want to filter mail from a particular sender, check the **From** checkbox.
- In the **Text** field, type the text by which you want to filter. This might be an mail address, a word, a name, or a phrase.
- Click either the **delete message** or **move message to** radio button, depending on what you want to happen to the filtered mail. If you want the messages moved to a folder, select that folder from the **select folder** pop-up list.
- Click the **Create** button.

5. Repeat Step 4 to create more filter rules if you wish.



- Specify the order in which you want the filters applied by ordering the list of filter rules. Filters are applied in the order they appear in the list.



### Specifying When to Apply Filters

- In the icon bar at the top of any page, click **Options**.
- In the **Mail Management** column, click **Filters**.
- Check the appropriate checkbox to indicate when you want your filter rules applied.



- Click **Save Options**.

## Applying Filters Shortcut

To apply your filters at any time while reading your mail, click on the **Apply Filters** icon at the top of your folder view.



## View Message Headers and Message Source

### Viewing Message Headers or Mailing List Information

1. Open the message whose full headers you want to see.
2. Click the *Show All Headers* or *Show Mailing List Information* link at the top of the message.

The message view will refresh, with the additional headers shown. The links will change to allow you to hide, rather than show, the additional headers.

### Viewing Full Message Source and Headers

1. Open the message whose full headers you want to see.
2. Click the *Message Source* link in the text menu at the top of the message.

A new window, with the full message and headers in it, will open.

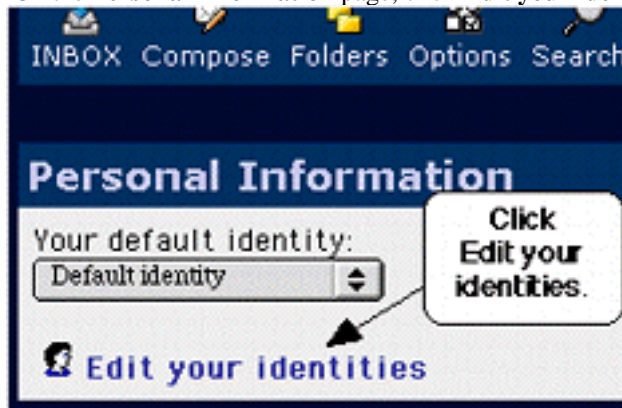
## Creating and Using a Signature File

A signature file contains text which is automatically added to your messages you compose, usually at the bottom (but the position is configurable). They are often used to provide additional information about yourself such as full name, job title, contact information, or just about any other desirable information.

## Warning

Do not include personal information in your signature which may endanger your safety or privacy. Including information such as your sex, name, home address and phone number can lead to harassment, stalking, or even in rare cases even endanger your safety.

1. In the icon bar at the top of any mail page, click on the **Options** icon.
2. In the **Your Information** column, click **Personal Information**.
3. On the **Personal Information** page, click **Edit your identities**.



4. Select **Default identity** from the **Your identities** pop-up menu, type your signature text, and click the **Create** button.

**Identities**

Your identities:  
 Default identity

Identity's name:  
 Default identity

Your full name:

Your From: address:  
 bjensen@umich.edu

Your Reply-to: address: (optional)

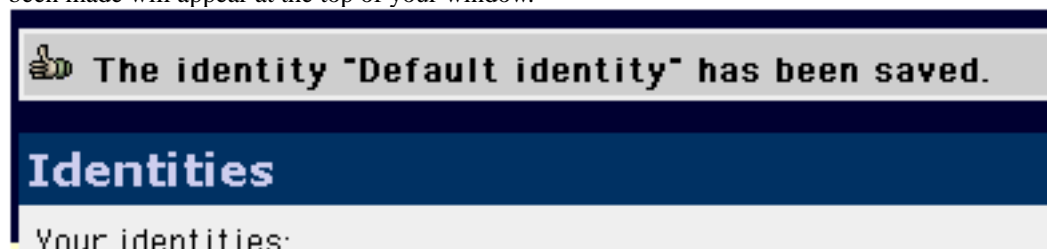
Your signature:  
 Barbara Jensen  
 mythical ITCS documentation writer  
 bjensen@umich.edu

Preceed your signature with dashes ( '-- ' )  
 Place your signature before replies and forwards?  
 Save sent mail folder

Sent mail folder:  
 sent-mail

Create Delete Reset Cancel

- Confirmation that the change you have made to your default identity -- adding a signature file -- has been made will appear at the top of your window.



You may test your signature by sending a message to yourself. If you aren't happy with the result, use the above instructions again to edit it as necessary. Note that you can not guarantee that everyone will see your signature as you intend if you make it complex or highly formatted. The reader's mail client formatting and fonts may be different than yours, or they may use special equipment (such as screen readers or braille printers for the blind) to access their mail. It is best to keep your signatures as simple as possible to ensure others will be able to read them properly.

## **Your E-Mail Quota**

Many accounts have a disk quota -- how much disk space you can use to store your files (including email folders) in your account. If you use more than this space, you are said to have "gone over" or "exceeded" your quota. If that happens, various things may not work correctly, or you may not see new mail messages until you return to within your quota allocation.

It is important to monitor your quota and make sure you do not exceed it for proper functioning of your account and protection of your files.

# Chapter 4. Mail Advanced Features

## iCalendar Invitations

If you receive a iCalendar (or vCalendar) email attachment, you can view the attachment to see the details of the invitation. When viewing the attachment, there will be a link at the top of the page allowing you to add the event to your calendar.

## Using PGP

### What is PGP?

PGP stands for *Pretty Good Privacy* and is a tool for secure communication and data storage, especially for use with e-mail. It can be used to encrypt data and to create digital signatures. Mail uses GnuPG (GNU Privacy Guard) to provide this functionality.

## Configuring PGP in Options

In order to use PGP, you must first configure it in your Options.

### Enable PGP functionality?

If this option is selected, you will be able to create/view your personal PGP keys, add/delete public keys from other individuals, read encrypted mail, verify digitally signed mail, and encrypt/sign your outgoing mail.

If this option is not selected, you will not be able to use any of the PGP features.

### Attach Public Key

If selected then a copy of your PGP public key, if it exists, will be attached to the outgoing message.

### Scan Text Bodies

If selected then the body of all text messages will be scanned for PGP data, and display the results if any data is found. Note that this may slow down the system as every text message must be scanned in its entirety for PGP data.

## Sending Messages using PGP

When sending messages with PGP support enabled, there are several options for how to send the message.

### **No Encryption**

Send the message with no PGP encryption or signatures (cleartext).

### **Encrypt Message**

This option will encrypt the current message, using PGP and the recipients personal public key, and then send it. You can only send a message to a single person using this option. You **MUST** have the public key of the recipient stored in your address book or else this option will fail. If you have the public key for the recipient in your address book and are still receiving errors, verify that the e-mail address in the recipient field matches the e-mail address where the public key is stored. The encrypted data will be attached to the outgoing message.

### **PGP Sign Message**

This option will digitally sign the current message using PGP and your personal private key. If you have not already entered the passphrase for your private key during this session you will be prompted for it. The recipient must have a copy of your public key to digitally verify your signature.

### **PGP Sign/Encrypt Message**

This option will first digitally sign your message and then will encrypt the resulting output. See the 'Encrypt Message' and 'PGP Sign Message' entries above for further information.

## **Managing Public Keys**

### **Overview**

This screen lists all of the current users in your address book that have PGP public keys. These users are the **ONLY** users that you can either

1. send an encrypted message to -OR-
2. verify a digital signature.

### **View**

Opens a window to view the PGP public key.

## **Details**

Displays some details about the PGP public key.

## **Delete**

Deletes the public key from your address book.

## **Import**

This button will open a window where you can manually import a PGP public key. The key can either be pasted into a textfield or, if the key resides in a file on your local computer, you can import it. If the key is valid it will be inserted into your address book and the window will close; if not valid, an error message will be returned explaining why.

# **Managing Personal Keys**

## **Overview**

If you want to digitally sign messages or enable others to send you encrypted messages, you must have your own personal public/private PGP keypair.

## **Your Public Key**

Your public key should be made available to any person that you want to be able to send you encrypted messages that only YOU can decrypt (using your private key). Additionally, your public key needs to be made available to anybody you send a digitally signed message to - the public key is required to verify the digital signature.

## **Your Private Key**

Your private key is necessary to decrypt any message encrypted using your public key. Additionally, your private key is needed if you want to digitally sign a message. Your private key will be protected via a passphrase created when the keys are generated. Thus, to perform any activity that requires your private key, you will be prompted for your passphrase. You only need to insert your passphrase once per session - it will be stored until you logout (So be sure to logout!).

## **Public Key**

### **View**

Opens a window to view the PGP public key.



### **Details**

Displays some details about the PGP public key.

### **Private Key**

#### **Enter Passphrase**

Opens the passphrase dialog window. The passphrase entered, if correct, will be stored until your session ends.

#### **Unload Passphrase**

Removes the stored passphrase from Mail - any additional usage of the private key will require you to reenter the passphrase.

#### **View**

Opens a window to view the PGP private key. **DO NOT SEND THIS KEY TO ANYONE** -- this option is strictly so that you can export your personal private key for use in another program.

### **Details**

Displays some details about the PGP private key.

### **Delete**

This button will delete your personal public/private keypair from IMP's preferences.

### **Create Personal Key**

#### **Name**

The name you want embedded in your personal keys. A required field.

#### **Comment**

A comment string you want embedded in your personal keys. An optional field.

#### **E-mail Address**

The e-mail address you want associated with your personal keys. A required field.

### **Keylength**

The keylength, in bytes, of your generated key. The greater the value, the greater the protection (and also greater generation time and encryption time). 1024 bytes is the default - this value provides excellent protection.

### **Passphrase**

The passphrase used to protect/encrypt your personal private key. This should be AT LEAST 6 characters, should NOT be the same as your login password, should NOT be based on a dictionary word, and should include both numbers and letters. You must enter this passphrase twice for verification purposes. A required field.

### **Actions**

#### *Create Keys*

Create and store your personal/private keypair.

#### *Import Keypair*

Import a personal/private keypair. This button opens a window where you can manually import your existing PGP personal public/private keypair. The keys can either be pasted into a textfield or, if the keys reside in a file on your local computer, you can import them. If the keys are valid they will be inserted into your preferences and the window will close; if not valid, an error message will be returned explaining why.

## **S/MIME: Overview**

### **What is S/MIME?**

S/MIME is a private/public key pair system which provides digital signatures, message privacy, and tamper detection in a open, interoperable way. S/MIME can provide message privacy by encrypting messages that only the sender and the intended recipients can decode. It allows you to identify the sender of a message via a digital signature. Together, this encryption and digital signing help provide tamper detection, allowing recipients to determine whether a message was altered after it was sent.

### **S/MIME Options**

Before you can use S/MIME, you need to configure it in your Options.

### **Enable S/MIME functionality?**

If this option is selected, you will be able to import your personal S/MIME keys, read encrypted mail, verify digitally signed mail, and encrypt/sign your outgoing mail.

## **S/MIME: Personal Keys**

### **Overview**

If you want to digitally sign or encrypt messages you must have your own personal public/private S/MIME keypair.

### **Import Keypair**

Import a personal/private keypair. This button opens a window where you can manually import your existing S/MIME personal public/private keypairs. The keys can either be pasted into a textfield or, if the keys reside in a file on your local computer, you can import them. If the keys are valid they will be inserted into your preferences and the window will close; if not valid, an error message will be returned explaining why.

Key pairs must be imported as PEM format keys (pkcs7 format). Pkcs12 format is not supported.

# Chapter 5. The Address Book

## Introduction

The address book functions like an address book, phone book and Rolodex, allowing you to store or retrieve contact information in a convenient manor, and integrated into the other PhyNet Portal applications.

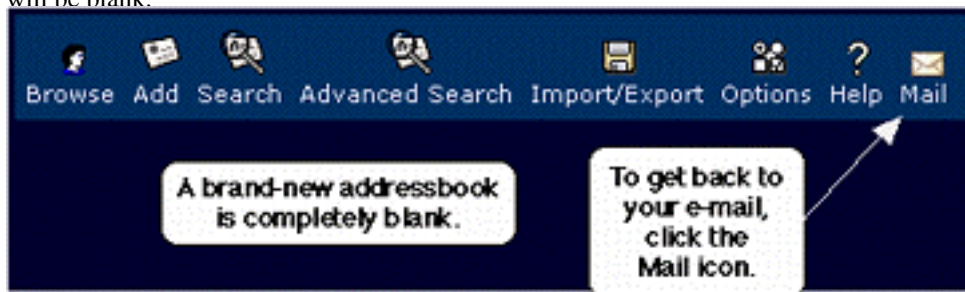
The address book lets you maintain your own private address book, as well as letting you access some public internet directories. You may find the address book useful to send email to people who have long or complex email addresses (by setting nicknames which you can then use as short cuts for their addresses) or to make distribution lists for groups of addresses. It can also be used to store other information about your contacts.

## Opening your address book

1. In the icon bar near the bottom of the browser window, click the **Address book** icon.



2. Your address book will open. If you have not yet added any entries to your address book, the page will be blank.



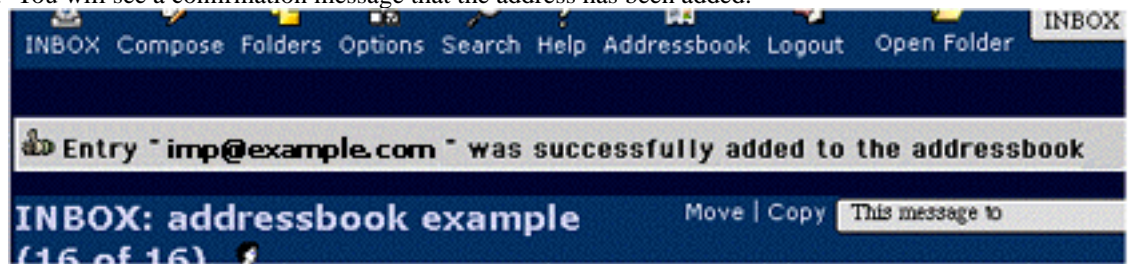
## Adding people to your address book

### From within an mail message:

1. Click the **Address Book** icon next to an mail address to add that address to your address book.



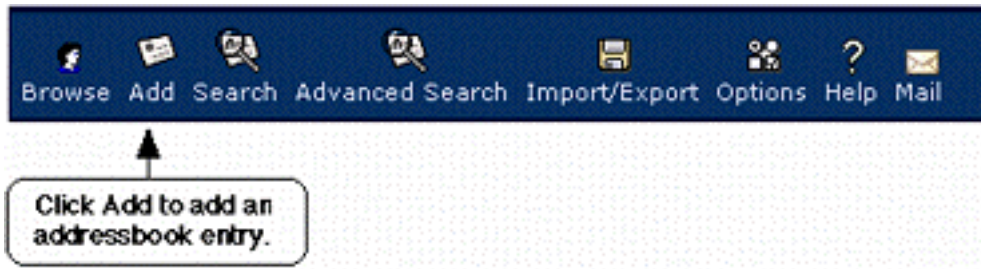
2. You will see a confirmation message that the address has been added.



If you want to add information, such as a nickname or postal address, to the new address book entry, you can edit the entry. Only the available information, such as mail address and possibly name, will be added for now.

### From the address book:

1. Open your address book by clicking the **Address Book** icon in the icon bar near the bottom of your browser window.
2. In the address book icon bar, click **Add**.



3. Enter the contact information for your entry.

A screenshot of the "Add a new contact" form. The form has fields for Name, Email, Nickname, Title, Company, Home Phone, and Work Phone. There are "Save" and "Reset" buttons at the top right. A callout box points to the "Save" button with the text: "Then click Save." Another callout box is positioned over the form fields with the text: "Enter the information you want in your entry."

The new entry will be added to your address book.

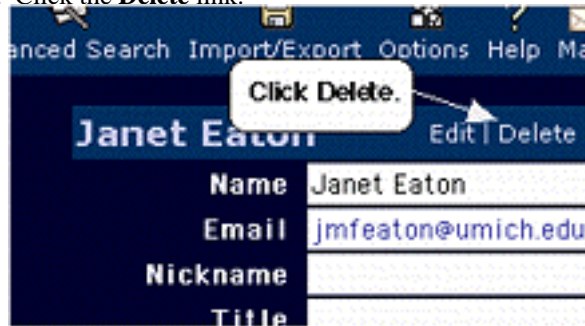
## Opening an address book entry

1. Open your address book.
2. Open an entry by clicking the person's name. (Do not click the mail address; that will open a new message addressed to the person whose address you clicked.)



## Deleting people from your address book

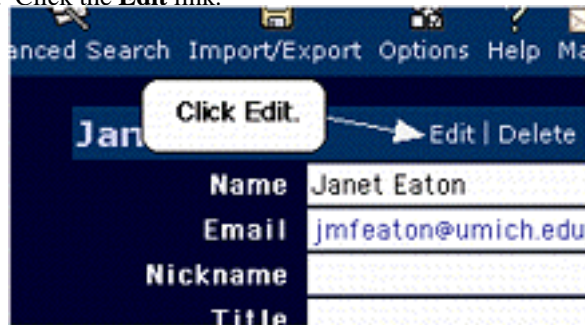
1. Open the address book entry that you want to delete.
2. Click the **Delete** link.



The entry will be deleted, and you will be returned to your address book.

## Editing address book entries

1. Open the address book entry that you want to edit.
2. Click the **Edit** link.



3. Make whatever changes you want to the entry.
4. Click the **Save** button to save your changes.

## Importing other address books

If you already have information stored in another address book which you want to use with the PhyNet Portal applications, you (probably) don't have to re-enter all your information. Instead you can import address books from other software into PhyNet Portal in various formats.

Not all address books formats can be imported. But it supports most common formats, including Pine, CSV (comma-delimited), vCard, and others.

To import addresses, you must first get a copy of the address book you want to import onto your local computer. Many mail and address book programs have an export function to create such a file.



### Warning

Any duplicates in the imported data will be imported again as a new card. Please check your imported data for duplicates!

## Importing from Microsoft Outlook

In order to import from Microsoft® Outlook™, you should have exported your address book using Outlook™'s *Import and Export* function, and exported to a comma delimited (CSV) formatted file. Use the default settings for each step of the export. Call the resulting file *addressbook.csv*, and place it in a known location (e.g. on your Desktop.)

After the file *addressbook.csv* has been created, return to Horde and do the following:

1. Press  *Addressbook*
2. Press  *Import/Export*
3. Select *Outlook* from the *Select the format to import from:* menu
4. Select the address book you wish to import into. You can always import into *My Addressbook*. You can only import into a shared address book that you have permission to access. This is dependent on the installation. Please contact your administrator if you need assistance.
5. Press **Browse** and locate your *addressbook.csv* file you created in Outlook. Once you've found it, press ok, and it will be selected to be imported.


**Important:** You can only select one address book at a time to be imported.

6. After selecting the comma-delimited file, press the **Import** button to read the file into memory.
7. The **Map Import Fields** panel will appear so you can fine-tune the import settings. Outlook has a default field order that is taken care of by the *Outlook* import option, so changes to this panel usually aren't necessary.



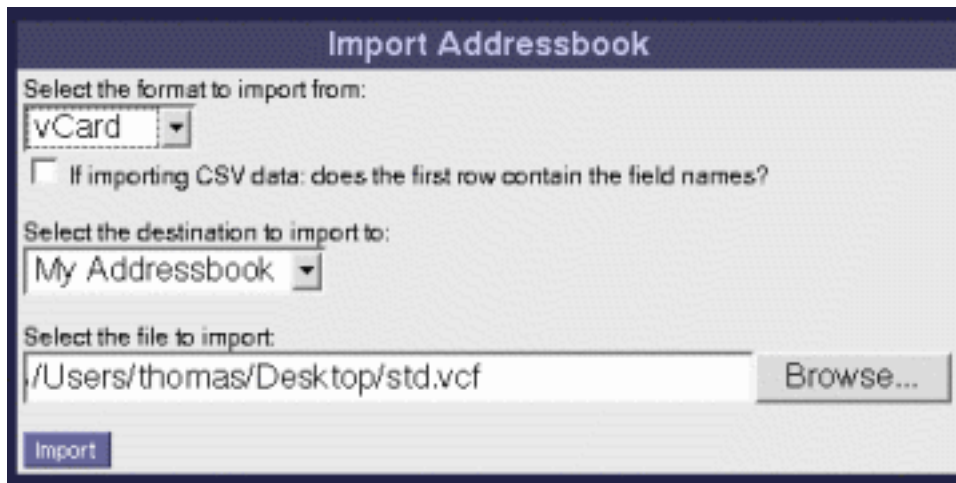


Scroll down and press the **Import** to import the address book.

8. Press the  **Browse** button to see your address book, including your newly imported entries.







## Importing vCards




When *vCard* is selected from the *Select the format to import from:* menu, you can import vCard format files most commonly found in e-mail attachments. These files typically have the filename extension *.vcf* and are not comma delimited files.

Importing a vCard from an email attachment.



1. While reading a message that has a vCard attachment, click on the  icon which downloads the file to your machine. Save it to a known location, for example to your desktop.
2. Select the  *Addressbook*.
3. Select  **Import/Export**, and go to the *Import Panel*.
4. Select *vCard* from the *Select the format to import from:* menu.
5. Select *My Addressbook* from the *Select the destination to import to:* menu.
6. Click the **Browse** button in the *Select the file to import:*
7. Select the vCard file you saved, and press *OK*.
8. No other options need to be set. Press *Import*.
9. Press  *Browse* to see the new address book entry listed in your address book.



## Importing from another Horde Addressbook.

With the *CSV* option in the *Select the format to import from:* menu, you can directly import files exported with the *Export* panel in the  *Import/Export* menu.

The below procedure shows how to import a CSV file exported from *My Addressbook*

1. Select the  *Addressbook*.
2. Select  *Import/Export*, and go to the *Import Panel*.
3. Select *CSV* from the *Select the format to import from:* menu.
4. Select the address book you wish to import into. You can always import into *My Addressbook*. You can only import into a shared address book that you have permission to access. This is dependent on the installation. Please contact your administrator if you need assistance.
5. Press **Browse** and locate your *addressbook.csv* file you created in Outlook. Once you've found it, press ok, and it will be selected to be imported.

**Important:** You can only select one address book at a time to be imported.

6. After selecting the comma-delimited file, press the **Import** button to read the file into memory.
7. The *Map Import Fields* panel will appear so you can fine-tune the import settings. Outlook has a default field order that is taken care of by the *Outlook* import option, so changes to this panel usually aren't necessary.

**Map Import Fields**

Select two matching fields.

Imported fields: Available fields:

lastname

Add pair


**Matching fields**

name	Name
email	Email
homeAddress	Home Address
workAddress	Work Address
homePhone	Home Phone
workPhone	Work Phone
cellPhone	Cell Phone
fax	Fax
title	Title
company	Company

Remove pair

Import

Scroll down and press *Import* to import the address book.

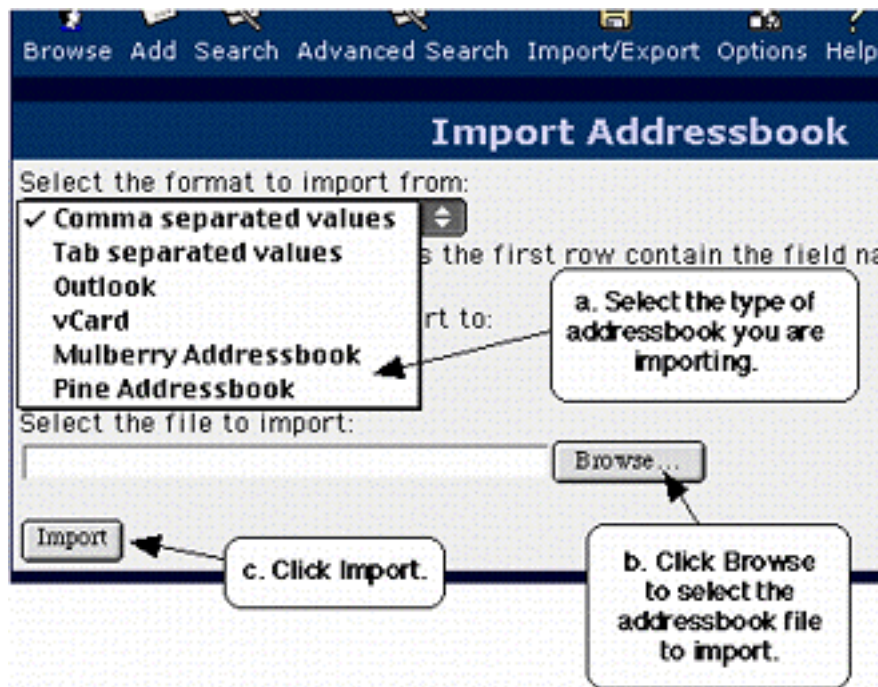
8. Press the  *Browse* button to see your address book, including your newly imported entries.

## Importing Pine Address books

1. Open your address book.
2. In the address book icon bar at the top of the page, click the **Import/Export** icon.



3. Import your address book:
  - a. From the **Select the format to import from** menu, select **Pine Address Book**.
  - b. Click the **Browse** button to navigate among the files on your computer to find your pine address book file. Select it.
  - c. Click **Import**.



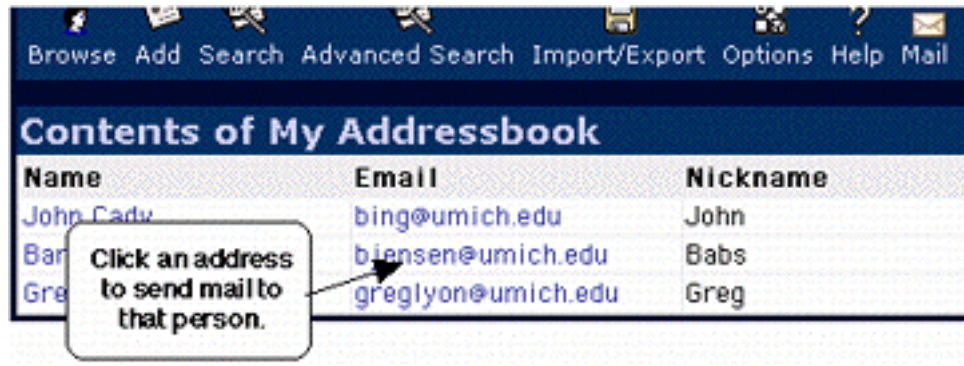
The entries will be added to your address book.

**Note:** Some complex addresses (distribution lists, etc) may not import correctly.

## Sending a message to someone in your address book

### From the address book

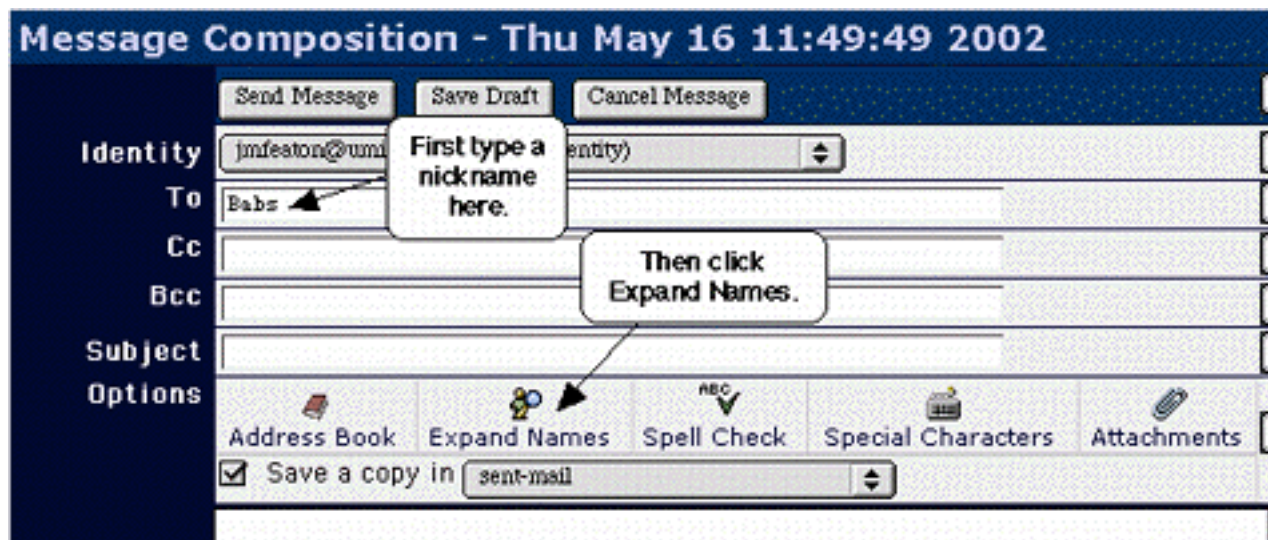
1. In your address book, click the address of the person to whom you want to send mail.



2. The **Message Composition** window will open, with the **To** field already filled in for you. Write your message and send it as usual.

### Using Nicknames While composing a message

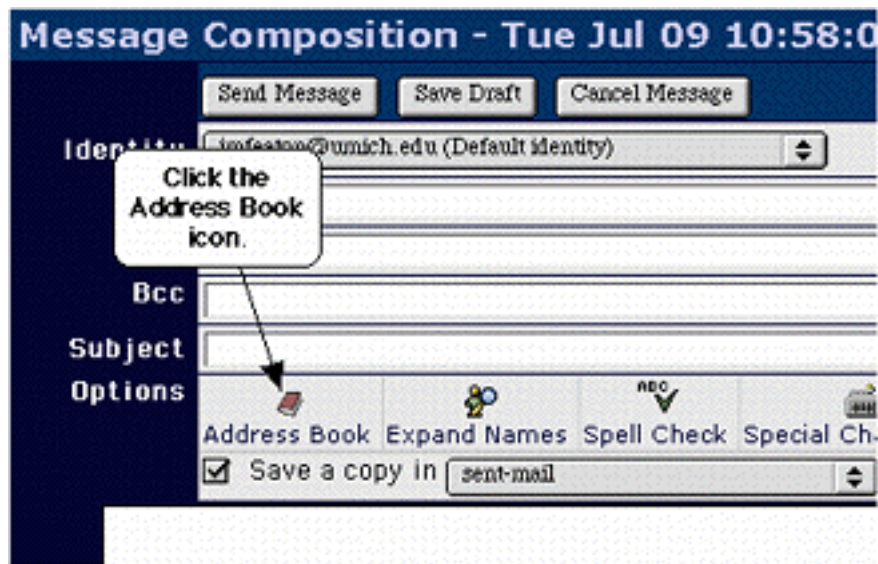
1. Type the nickname(s) into the appropriate fields, then click the **Expand Names** tab to expand the nickname into matching address or addresses.



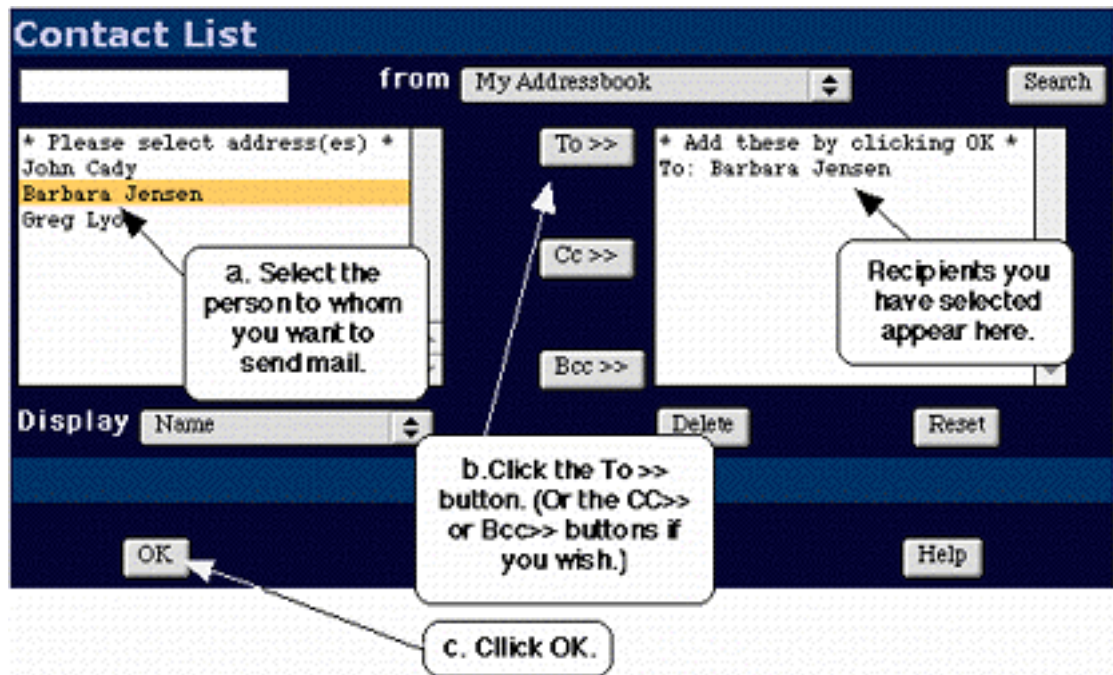
2. If multiple matching names are found, a list of them is returned. Select the correct name from the list.

## Address Book Interface While composing a message

1. In the **Message Composition** window, click the **Address Book** icon.



2. In the **Contact List** window,
  - a. Select the person(s) to whom you want to send mail from the list on the left side of the window.
  - b. Click the **To>>** button to enter the selected address(es) in the **To** field of your message. (Click **Cc>>** to enter the address(es) in the **Cc** field, and the **Bcc>>** button to enter them in the **Bcc** field. "Cc" stands for "carbon copy" and "Bcc" stands for "blind carbon copy.")
  - c. Click **Ok**.



You will be returned to the Message Composition window, with the addresses filled in.

## Searching in address books

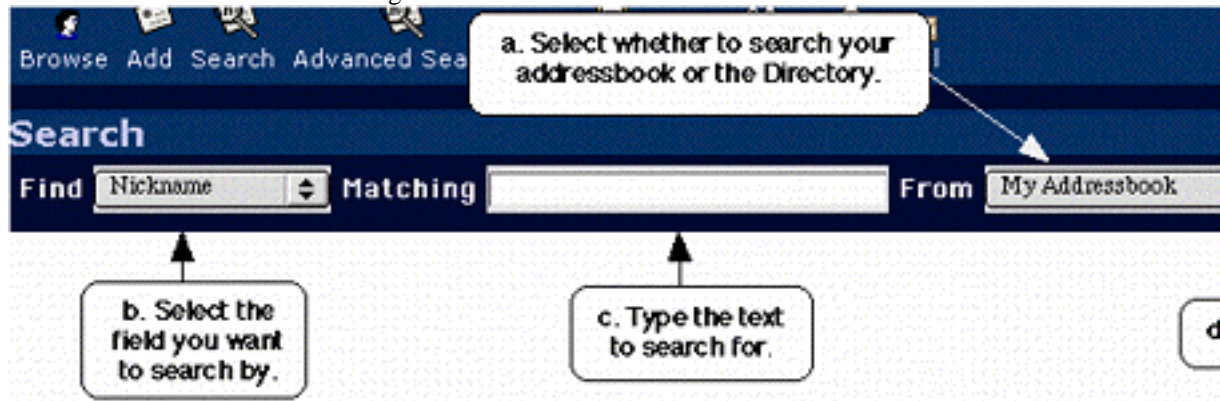
1. From within your address book, click **Search**.



2. Select and enter your search criteria:
  - a. From the **From** menu on the right, select whether you want to search your address book or some other address book such as a public directory.
  - b. From the **Find** menu, select whether you want to search by name, nickname, or mail address.
  - c. In the **Matching** field, type the text you want to search for.



- d. Click the Search button at the far right.



Your search results will be displayed.



# Chapter 6. The File Manager

## Introduction

The file manager allows you to access and manipulate your files easily via your web browser.

When you enter the file manager, you will be presented with a view of all your files and folders, and their details such as their size and permissions.

## Sorting

When viewing your files and folders, you can sort them by any column by simply clicking on the appropriate column heading. To switch the sort order between ascending and descending order, click on the small arrow icon in the column heading. The arrow will change to indicate the sort direction;  for ascending and  for descending.

## Actions

### Creating a Folder

To create a folder in the current directory, simply choose **Create Folder** from the actions drop down box. You will be prompted for the name of the folder to create. Enter the name, and then click on the **OK** button.

### Deleting Files and Folders

Select the file(s) or folder(s) to delete by clicking on the checkbox to the left of its name. If you are deleting a folder, you must be sure that those folders are empty, or the deletion will fail. Next, select the **Delete Items** actions drop down box.

### Downloading Files

To download a file or files, select the files by clicking the checkbox to the left of the file name(s). Then select **Download Items** from the actions drop down box. Note that downloading an entire folder is not possible, so to get all the items in a folder you must first navigate to the folder, select all the files in it, and then choose the **Download Items** entry from the actions drop down box.

### Uploading Files

To upload a file to the current folder, click on the **Browse** button, navigate to the file which you wish to upload, and click the **OK** button. The filename will appear in the text box, then click on the **Upload File** button and your file will be uploaded to the current folder.

# Chapter 7. The Calendar

## Introduction

The calendar combines the functions of a desktop calendar and an appointment book to help you keep track of your activities and help plan your time. It provides many of the functions commonly found in "Day Planners."

It provides private and shared calendars, multi-calendar view, collaboration and scheduling features, recurring events (with exceptions and various deletion options), alarms, remote iCalendar support, importing/exporting of iCalendar and Palm DataBook (PDB) data, an iCalendar invitation and view system integrated with IMP, and integration with other PhyNet Portal applications.

## Calendar Views

You can view your calendar in various ways to get the level and detail of information you need. The available views are the day, work week, week, and month views. You can switch between the views by using their icons in the calendar menu bar.

### Day View

The day view shows a single day's events in the window, in chronological order through the day. This is sometimes referred to as a "Day Planner" view.

The times shown are also links which can be used to create a new entry at that time.

If two or more events have overlapping times, they will be shown side by side. The longer events are shown first (to the left), with shorter duration events last (to the right).

### Week and Work Week Views


The week and work week views display a "week" (5 days for the work week view, or 7 days for the week view) of entries. The days in the week are shown side-by-side, with events shown in the same format as the day view.

At the top is a header line showing the date of each day, with the current day highlighted. Clicking on a date in this header line will take you to the day view for that date. Next to the date is a small icon which can be used to create a new entry for that date.

### Month View

The month view displays a traditional monthly calendar view for a month, with the days of the month arranged in weekly rows. The current day will be highlighted. Each event is shown in the box for the day it occurs within. Recurring events will be shown for each day they occur on.

Each day box contains two icons at the top. The first icon is the day number, which also acts as a link to the day view for that day. The other icon allows you to create a new event for that day.

For each existing entry for a day, you will also see a summary of the entry given, which acts as a link to that event. Clicking on an event will display the event and allow you to edit the event. Each event will also have a small  trash can icon next to it which can be used to quickly delete an entry. Recurring events will be followed by a small icon of two arrows chasing each other. Finally, events with an alarm will show a small bell icon next to the description.

## Calendar Actions

### Creating a New Event

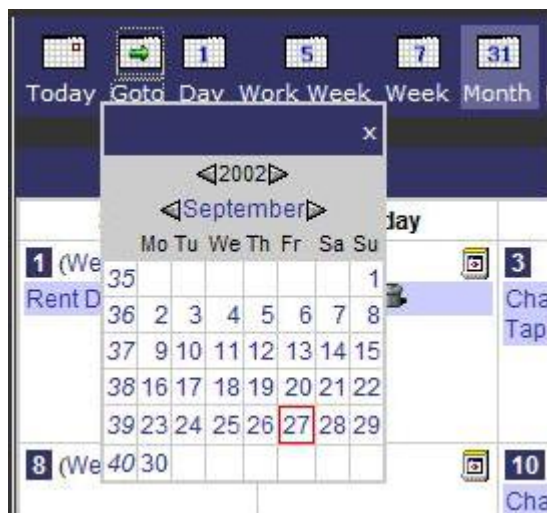
You can create new event at any time using the **New Event** icon in the calendar menu. You will be presented with a form to fill out for the event you want to add. The current date and time (rounded to the next hour) is used as default values in the Start and End Times for the event. Use the **Save Event** button to save the entry to your calendar when you are done entering the information.

### Viewing and Changing an Event

Selecting an event from any of the Day, Week, or Month views retrieves the event and displays it for viewing, deleting, or editing.

### Navigating via the Goto Pop-UP

The **Goto** menu item will display a small pop-up window in which you can quickly select a year, month, week of the year, or day of the month to *go to*. This is usually the quickest way to move within the calendar.



## Importing and Exporting Calendars

The **Import/Export** menu item allows you to import or export calendar events. Currently you can import files in CSV, Microsoft Outlook, Palm DateBook, and vCalendar/iCalendar formats. You can export to only CSV and iCalendar formats.

## Printing Calendars and Events

Certain views are designed to be printable. When in one of these views, a **Print** icon will appear in the top menu bar. Use this menu icon to print the current view.

## Entry Settings

You can set various attributes for each entry in a calendar.

### Title

Set the **Title** field to be the title of the entry. This should be a short description of the entry, and is what will show up in most views. You should make sure this title is meaningful to you.

### Calendar

The calendar selection box lists all your calendars. Select which calendar to which you want to add this entry.

### Category

You can select a category for this event using the **Category** selection box. You can use a pre-existing category, or create a new category to use. Categories help you organize your entries, and allow you to color code them to locate different types of events easily.

### Location

You can specify the **Location** for an event here. This could be any type of location, such as a room number, building name, city, etc.


### Times

You can specify the time for the entry in multiple ways. You should always specify at least the **Start On** date. Unless it is an all day event, then you should also specify the starting time.

The duration will be automatically set to one hour after the start time, but may be changed to any ending date and time. You can set the ending time as either a date and time, or as a duration. There is a special duration checkbox for **All Day** entries.

## Alarms

The PhyNet Portal applications can generate alarms for events in a calendar. Each event can be set to either have an alarm or not have an alarm. By default, the alarm is generated fifteen minutes before the appointment is supposed to start, but the alarm can be set (per event) to occur at almost any interval before the event start time.

Event with alarms will be indicated by a  bell icon associated with the event.

## Description

You can optionally enter a **Description** in the area provided to provide more details about the entry. While this is completely optional, it is often very helpful to add extra information about the entry here. This information can be seen when viewing the event, and in some views may be seen as a "mouse over" when you move the the mouse pointer over the event.

Common contents might include directions to the location, cost, participants, phone numbers, preparation details, etc.

## Recurring Events

Events can be made to repeat in various ways. Many events repeat in certain frequently used ways. For example, the *Monthly* recurrence types make the selected item repeat each month and the *Weekly* recurrence type makes the selected item repeat each per week. These can be made to represent events that repeat in complex ways: for example, an item that occurs on the last Friday of each month, or an item that occurs on Monday, Wednesday, and Friday every week.

You can also restrict how long an event repeats by selecting the *end date* for the event's recurrence.

Normally, a modification to a repeating event applies to all occurrences of that event. A single occurrence of a repeating event can be modified by editing the occurrence, removing its recurrence information, and then choosing the **Save as New** option from the Repeat menu. The selected occurrence can now be modified independently of the other occurrences.

## Calendar Event Invitations

If you create an event in a calendar, you can then send an invitation to those you want to attend the event. The invitation card is sent as an email attachment in iCal format.

**Note:** To send an invitation, you must have a default identity configured with a From email address in your email application.

To send an invitation:

1. Select the event in the calendar
2. Click on the "invite" link

3. Enter the email addresses of people you want to invite in the text box provided, separated by commas. You can use the button provided to add people from your address book. Click the **Invite these people**" button when done.

# Chapter 8. Tasks

## Introduction

Tasks is a fairly full-featured task or "to-do" list manager that supports private and shared tasks lists, integration with the Calendar application, categories, priorities, due-dates, searches, printing and import/export functions.

### Why Tasks and not Calendar?

There is sometimes some confusion as to the difference between tasks and calendar entries. But there is a large conceptual difference between tasks and calendars entries.

Briefly stated, calendar events are either "be there" or "date based" events. A "be there" event is anything that requires your physical presence at a specific place and time, such as meetings, appointments, prearranged telephone calls, vacations, sports events, etc. "Date based" events are events that happen on a specific date like holidays, birthdays, anniversaries, the start and end of classes at school, etc.

By contrast, tasks are things you need "to do" either alone or with others. They can be simple tasks that need to be done as a single step, or more complex tasks which require concerted effort over a period of time, may have sub-tasks, target dates for start and completion, etc. Generally you use the tasks list for specific tasks (or duties) you must perform and for which you want to track their status through to their completion.

As an example, consider the task of building an addition to a house. Adding an entry such as "build room addition" in your calendar on a specific day is of little use -- it may remind you to start the task on that day but it won't help you identify the various stages needed, schedule those stages by priority or timeline, plan for completion of the various stages or the entire project, or track the status of both the sub-tasks and the entire project as it progresses. It is a good fit for a task list rather than a calendar entry.

On the other hand, a lunch date is a better fit for the calendar. You only need information about where to be, when to be there, and who else will be there. You don't require sub-tasks, progress tracking, status reports, etc.

## Tasks Actions

### Listing and Reading Tasks

By default, when Tasks is entered it shows a list of your tasks in your default task list. Tasks are shown one per line with the event description, its priority, and its due date.

Selecting a task entry will open it up for viewing.



## Creating a Task

Creating a task is very simple. Select **Add** from the menu bar. You will be presented with a form with several fields. The fields are:

### *Name*

This is the label that will be shown in the List and Search views. It uniquely identifies each individual task. It should be simple and recognizable in a list of others tasks.

### *Category*

The task's category. Categories allow you to separate your tasks into more manageable groups. There is a default group called *Unfiled* for tasks that don't fit into any other category.

### *Due By*

If the task has a definite due date, then it can be selected here. You can select a due date by selecting the second option and entering a due date.

### *Priority*

Tasks can have priorities, ranging from 1 to 5. You can use the priority to sort and color code your tasks. There is no real meaning to the priority numbers, but it is conventionally used as an importance indicator, with 1 as the most important and 5 as the least important.

### *Completed?*

This field specifies whether the task is completed.

### *Description*

This field is for entering a description of the task. It can contain any information relevant to the task, for example what needs to be done, sub-tasks, or other information about the task.

Once you've set the fields as desired, use the **Save Task** button to create and save the task into the task list. You can discard your entries without saving them by using the **Undo Changes** button.

## Deleting a Task

If you wish to delete one or more tasks from your task list, you can mark the task(s) to be deleted by checking the small checkbox next to the task. Then select *Delete* from the **Choose Action:** drop-down menu box. A confirmation window will appear, asking if you actually want to delete the entries. Click on the **Ok** button to delete the entries, or click on the **Cancel** button to keep the entries.

## Searching

You can search your tasks by name or description or both.

To search for a task, press the **Search** icon from the menu bar. This will open a view where you can specify *Search Text*, or what text to search for. It will also ask for the *Search Scope*, which allows you to search the description and/or the name for matching text. You must select at least one of these scope

values. Then click on the **Search** button to perform the search. Any tasks matching your search criteria will be returned.

# Chapter 9. Notes

## Introduction

Notes is an application which allows you to create the computer equivalent of sticky notes. Notes can be created, modified, deleted, and printed. You can also search on your notes to locate information. Support for importing and exporting notes is also available. Unlike real sticky notes, your computer notes can be shared with others in different physical locations. Notes can be organized into different notepads, and assigned categories.

## Notes Actions

### Listing and Reading Notes

By default, when Notes is entered it shows a list of your notes in your default notepad. What is actually displayed is dependent on the settings in the *Display Options* panel in the *Options*.

Selecting a note will open it up for viewing. The entire text of the memo is shown. The note can also be modified or deleted from this display.

### Creating a Note

Creating a note is very simple. Select **Add** from the menu bar. You will be presented with a form containing one field -- the text to enter into the note. You can enter as much text as needed by the note, and you can also paste it in from other sources using your system's or browser's cut and paste support. The description of the note is the very first line of text in the note. The rest of the note is defined as the body of the note.

### Modifying an Existing Note

Pressing *Modify* allows for the note to be modified. The contents of the existing note will be displayed for editing. You may modify the contents of the note, then press the **Save Note** button to save the changes made to the note, or **Undo Changes** to discard those changes.

### Searching

You can search your notes by description or by the content. To search for a note, press the **Search** icon from the menu bar. This will open a view where you can specify *Search Text*, or what text to search for. It will also ask for the *Search Scope*, which allows you to search the description and/or the entire note body for matching text.

# Chapter 10. Discussions

## Introduction

This is an application for accessing UseNet News (also known as NetNews, News, or Discussion Groups). Usenet News is a publicly accessible Internet collection of electronic discussion groups (called newsgroups), each devoted to a specific topic. There are tens of thousands of newsgroups, arranged in a hierarchy with each level of the hierarchy separated by a dot (".") character. Some of the major hierarchies are "alt" for discussion of alternative topics, "comp" for computer topics, and "sci" for science topics. From the major hierarchies, individual newsgroups or lower hierarchies are formed.

People can read and post articles (also called postings or messages) to relevant newsgroups. The people who contribute worthwhile postings to newsgroups make the system an invaluable resource.

Unfortunately, many postings are not of worthwhile content, and the "signal to noise" in un-moderated groups can be very low.

## Navigating Newsgroups

When you first access the Discussions application, you will be presented with a listing of the top level UseNet hierarchy, from which you can navigate the list of discussion groups. For example, if you click on the "plus sign" link to the left of the group titled "soc" it will expand into a list of the forums and further hierarchies within the "society" hierarchy. The name of each newsgroup (such as soc.answers, soc.athiesm, etc.) is listed as a link. You can click on the newsgroup names to view a list of their posted messages and/or subgroups.

After viewing messages, you can return to this top-level listing of newsgroups by clicking on the Browse menu icon at the top of the page.

## Viewing Articles and Threads

You can view articles in two views: a simple listing of postings sorted in some manner, or by threads.

Many newsgroup postings are replies to previous postings. A string of successive replies to the same posting forms what is called a thread. It is often useful to view messages via such a threaded view, so that you can read (or skip) all the messages of each subject in sequence. This is especially useful if you want to reply to a posting, as threading lets you easily check if someone else has already posted the same reply.

## Posting Messages

You can post messages in two ways; by creating a new posting, or by replying to an existing posting.

### New Posting

You can create a new message to post at any time by using the "Post Message" menu icon at the top of the screen. It will fill in as much information for you as possible, but you should always double check

this information. Type your message text into the "Message" area, and click on the "Post Article" button to submit your posting.

### **Reply to a Posting**

When reading a message, there will appear a menu at the top of the message area with various links, including a "Post Reply" link. You can use this link to post a reply to the current message. It will automatically fill in as much information as possible, including a "quoted" copy of the message you are replying to in the "Message" area. You should double check the pre-filled fields, edit the included message for brevity, add your reply text, and then click the "Post Article" button to submit your posting.

# Chapter 11. Headlines

## Introduction

The Headlines application provides various "Channels" of information covering a wide range of topics. In addition to the more traditional "headline" type channels, it also provides weather information and stock quotes.

You can select which channels you want to view so as to tailor the system to your interests. Similarly you can select which stocks to view, and which weather information you want by region.

# Chapter 12. Bookmarks

## Introduction

The Bookmarks application allows you to store, organize and manage, and most importantly access your web browser bookmarks on-line and in one central place accessible from any web browser.

By storing your bookmarks here, you can access them from any browser on any machine that can access the PhyNet Portal applications. This means you can easily access your bookmarks from multiple browsers, multiple machines, remote locations, etc. And if you upgrade, switch, or test out browsers, you don't have to worry about what happens to your bookmarks or how to import them into the new browser.

## Adding bookmarks


You can add bookmarks in multiple ways. The first way is by adding bookmarks directly from inside the application. The other is to create a "quick link" in your web browser in order to add them quickly while browsing web pages.

To add a bookmark from inside the Bookmark application, click on the **Add** menu icon. You will be presented with a small form in which to enter the bookmark information. When you have entered all the information, click on the **Save** button.

On this *Add* page, there is also a link which you can drag to your browser's toolbar. Doing so will allow you to easily add bookmarks while surfing the web by simply using the toolbar link. This process works with most popular web browsers which support JavaScript.

## Deleting bookmarks

You can delete bookmarks, for example if you no longer need them or find you have entered duplicates.

When viewing your bookmark entries, each will have a small  trashcan icon next to it. Clicking on this icon will delete the bookmark.

## Editing bookmarks

You can edit existing bookmarks. This can be used for example to fix typos, change categories, or even to update a bookmark should the url change.

When viewing your bookmark entries, each will have a small edit icon (it looks like a pencil and paper) next to it. Clicking on this icon will allow you to edit the bookmark.

# Chapter 13. My Account

## Introduction

My Account allows you to maintain your account by doing a few standard account management tasks. Currently it supports changing your password and managing your email forwards and vacation notices.

## Forwards

The Forwards application allows you to manage mail forwards. A mail forward lets you redirect your mail to another mail address (or a comma separated list of addresses if you wish). You can even forward to another address and keep a copy in your local mailbox.

### Warning

You must be careful not to set up a "forwarding loop" where one account forwards to another account which forwards back to the first account (either directly or indirectly). Doing so can result in lost or bounced mail messages.

## Enabling a forward

Check the **Set/Install** checkbox to indicate that you desire to create a forward, and then enter the address(es) in the text box provided. If you want to forward to more than one address, separate the addresses with commas.

**Note:** If there is an existing vacation or forwards setup, it will be replaced by the new forward setup you create here!

If you want to keep a copy of the messages in your local INBOX as well as forward them to a remote address, then check the check box for **Keep a copy in your local mailbox?"**.

When ready to submit the forward, enter your password into the password box, and press the **Submit** button. At the top of the new page, there will be a message letting you know if the new forward was set or not.

## Disabling a forward

When the forward is no longer needed, you can disable it by checking the **Unset/Remove a forward** checkbox, entering your password in the password box, and submitting the form. At the top of the new page there will be a message letting you know if the new forward was set or not. Removing the setup stops any further messages from being forwarded.



## Password

When you select the option to change your password, you will be presented with a screen with three fields. The first field is asking for your current (old) password -- the one with which you logged in with for the current session. The next field is for the new password -- what you want the password changed to. The third field is a repeat of the second field -- you must enter the new password here a second time. Since the password is not displayed as you type it, forcing you to type it twice helps to insure that you entered it correctly, and helps prevent you from being locked out of your account due to a typing mistake. Once you have filled in all three forms, press the button to submit the password change request. You will then be told if the password change was successful or not.

After you change your password, PhyNet Portal functions will no longer work. You will need to log out, then log in again, to resume using the PhyNet Portal apps;.

Note that this changes your physics unix login password. Also note that while this password change is immediate on the mail server, there may sometimes be a slight delay before it is effective on the unix machines for login purposes. If you are having problems logging into a unix machine with the new password immediately after changing your password, try using your old password.

## Vacation

The Vacation application allows you to manage mail "vacation notices" or "auto-responders."

Once you set a vacation notice, the system will automatically reply to any incoming mail you receive. This can be useful while you are away or unable to attend to your mail -- for example while on vacation or out of town on business. It could be used as a courtesy to let others know why you are not answering their mail to you.

### Enabling a vacation notice

Check the **Set/Install** checkbox to indicate that you desire to create a vacation notice.

**Note:** If there is an existing vacation or forwards setup, it will be replaced by the new vacation setup you create here!

There is a large message composition window in the middle for you to compose your vacation message. This is the message that will be sent to others. A sample message is there, which you can edit to your needs.

The vacation message may include mail headers, and should include at least a Subject: header. It should NOT, however, contain a To: header as that will be generated automatically). If the string \$SUBJECT appears in the message, it will be replaced with the original subject line of the original message when the reply is sent.

When ready to submit the vacation notice, enter your password into the password box, and press the **Submit** button. At the top of the new page, there will be a message letting you know if the new vacation notice was set or not.

## Disabling a vacation notice

When the vacation notice is no longer needed, you can disable it by checking the **Unset/Remove** checkbox, enter your password in the password box, and submitting the form. At the top of the new page, there will be a message letting you know if the new vacation notice was set or not. Removing the setup stops any further vacation notices from being sent.

# Chapter 14. SSH Shell

## Introduction

Today it is recommended to use secure communications on public networks (i.e. the Internet). The secure shell (SSH) provides such secure communications, but it requires special software on the machines you are using. To avoid this requirement on the client machine, we provide a Java based SSH application. This provides an easy to use but secure way to log into your shell account with a very nice terminal emulator, all right from your web browser.

**Important Security Note:** The applet is susceptible to the man-in-the-middle attacks. We cannot avoid this. We can't even use the RSA based host authorization since the applet itself is downloaded from a remote host and might be modified by the man-in-the-middle. The only way to guard against applet modification would be having it signed with a trust certificate, but this is too expensive (in time, money, and development costs) to be practical. To summarize, this applet provides good security through encryption to prevent normal packet sniffing, which prevents the most common and easiest security attacks, but can not prevent more complex security attacks like man-in-the-middle attacks.

**Note:** This application requires Java. This version should run with all runtime environments that are at least Java 1.1.x compatible. If you are working with an older Java runtime environment (e.g. 1.0) please upgrade to a newer version.

## Menus

Along the top left of the terminal window is a menu bar with there main menus available: the **File**, **Edit** and **Terminal** menus.

### Menubar - *File* menu

The file menu allows you to connect and disconnect ssh sessions. You can also print the screen contents from this menu. And last, you can exit the terminal window.

### Menubar - *Edit* menu

#### *Copy*

Copies the currently selected text to the clipboard. Use the mouse to select text for copying to the clipboard. The left mouse button is used to initiate a selection. If the mouse button is held down, and dragged, then characters (and lines) are selected individually.

Once the text is selected, use the **Copy** menu entry to copy the selected text into the clipboard. The text may then be pasted back into the terminal window.

*Paste*

Pastes the current selection from the clipboard into the terminal at the current cursor position.

## **Menubar - *Terminal* menu**

Terminal configuration is accessed through the *Terminal* menu.

*Reset Terminal*

Resets the terminal parameters. This will not clear the screen or move the cursor, but any subsequent terminal output will be reset to the default font and attributes. This is probably only useful if a problem occurs causing the terminal to misbehave (such as sending binary output to the terminal causing the character set to change).

*Foreground Color*

You can select from various foreground colors for the display with this menu. This is the color used for font characters and the cursor.

*Background Color*

You can select from various background colors for the display with this menu.

*Smaller Font*

Click the *Smaller Font* entry to use a smaller font size. This will reduce the entire window size to match the smaller font size.

*Larger Font*

Click the *Larger Font* entry to use a larger font size. This will expand the entire window size to match the larger font size.

*Buffer +50* and *Buffer -50*

The terminal keeps a scrollbar through which you can view the history of the session. The buffer history can be viewed using the scrollbar provided in the window.

You can adjust the number of lines that will be maintained in the scrollbar buffer by using the *Buffer +50* and *Buffer -50* menu items.