Using Waterloo Polaris in the Office

User Interface and Networking Features

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Introduction

Outline and Scope of this Tutorial

This course is an introduction to Waterloo Polaris for staff and faculty who have a workstation in a private office. Emphasis is placed on familiarizing the user with the working environment on Waterloo Polaris and with its networking features.

Some familiarity with Windows95 is assumed. While this course is no substitute for training in Windows95, the essential features are repeated here to bridge the gap for inexperienced users.

In a student computer lab, Waterloo Polaris workstations are protected from tampering. In private offices, more freedom is available for users to modify their workstations. We discuss the set up of local printers and installation of local software.

The Waterloo Polaris Network — What's New and Why?

Waterloo Polaris is a PC network that is intended to give you easier access to the campus network, as well as to the latest software. It differs from the Watstar network in three important ways.

1) It uses Windows95 as the user interface and has the latest software, including Corel WordPerfect Suite 8 and Microsoft Office 97. The change was necessary in order to keep up with current software, most of which no longer runs under DOS / Windows 3.1.

2) The network relies on non-PC servers to manage many network functions. Particularly, Unix hosts handle email and Web services. **This means you now have more than one computer account and more than one password.** But, these accounts can be easily accessed from your PC workstation under Windows95, and Windows95 stores many of the passwords once you've entered them once**. This also means that the old Watstar "mail" command no longer exists.**

3) The internet networking "layer" is now loaded when Windows95 starts and is no longer available at the initial DOS level. This means Windows must be running before you can use any internet functions such as email.

Workstation Requirements

Windows95 and today's ever-larger applications put additional demands on your workstation. While Windows95 will run on a fast 486 with enough memory and hard disk space, the following is the minimum recommended workstation configuration:

- Pentium CPU
- 32 megabytes RAM[1]

[1] Note that RAM may not have been upgraded on your workstation. While 16 megabytes of RAM was sufficient for Windows 3.1 and its applications, it is only marginally acceptable for Windows95. You will likely experience crashing of applications if you have large documents and insufficient RAM.

- 2 gigabytes internal hard disk (1 gigabyte required)

To find out how much RAM is in your workstation, look under Start / Settings / Control Panel / System / Performance. Use **Windows Explorer** (Start / Programs / Windows Explorer) to see how much disk space you have available on the various partitions of your hard disk.

A Word About the New Applications

The switch to Windows95 makes available the latest versions of popular office software such as Microsoft Office and Corel WordPerfect Office Suite. **The user should be aware that the new software (especially WordPerfect) can be significantly different from the Windows 3.1 versions and will be totally different from the DOS versions.**

Unfortunately, this tutorial cannot cover changes to the office suites of applications. However, IST Client Services offers additional courses on the specific applications that you may rely on to do your work. You are encouraged to supplement this training with IST course offerings. Sign up via the Web at http://www.ist.uwaterloo.ca/cs/courses.html.

Getting Started

Passwords Associated with Your Account

You will need to keep track of more account passwords on the Waterloo Polaris network; however, once you are in Windows95, most of these passwords are stored and you won't be asked for them each time. You can also make some of them the same. For example, the first three passwords listed below could all safely be the same.

Your account now has several passwords associated with it:

1) **Your log-in password.** The log-in screen remains similar to the Watstar log-in. Once you log in, Windows95 will load (or, you may log in to a DOS prompt and start Windows95 with the command "win95"). Your account should be configured to start Windows95 immediately, since there is very little you can do now at the DOS prompt. Along with your log-in password, you can also set read and write passwords which allows others to access your user files on your N drive in read or write modes. You can change your log-in, read and write passwords with the **Configure Waterloo Polaris** utility.

2) **Your Windows95 password.** Windows95 requires that a password be set for some of its features to be operative, such as roving "profiles" (your personal modifications to your working environment). You can reuse your log-in password or choose a different one, but you will be required to provide the password each time Windows95 starts up. You can change your Windows95 password with the Passwords control panel (Start / Settings / Control Panel / Passwords).

3) **Your Windows95 screen lock password.** You should set a password on your screen saver to prevent others from using your computer when you leave it

unattended. This password is set in the Display control panel (or Passwords control panel).

4) **Your email password.** Your Waterloo Polaris account talks to a Unix host that handles your mail. When you read mail, the mail client program has to log in to the mail server to check for new mail. Once **Eudora Light**, the mail client, is configured with the email account password, it stores it and you won't be asked for it any more. Use the **Configure Waterloo Polaris** utility to find out what your initial email password is. To change your email password, you must do it by logging in directly to your email account. **N.B. Eudora's utility for changing your email account password (Special / Change Password) does not work.**

5) **Your Web server password.** If you manage a Web page, it will be on a separate Unix or NT account with yet another password.

Windows95 Basics

In this section we will try to cover the things you **must** know, but it is not a substitute for a more in-depth course. IST-Client Services offers in-depth courses in Windows95. Sign up via the Web at http://www.ist.uwaterloo.ca/cs/courses.html.

Windows95 has a significantly different "look and feel" than Windows 3.1. Hopefully you have had a chance to take one of the IST courses on Windows95. What follows are a few tips which should allow you to get to work right away. You can then learn and use the "advanced" features of Windows95 to adjust your working environment as you like. You should also know that there are numerous ways of doing the same operation in Windows95. These notes cover only one way. As you gain experience, you may find other methods that you prefer.

Mousing

- Windows95 and software that runs on it has added functions to the right mouse button as well as the left. Try clicking things with the right mouse button to see what happens.

- The left mouse button is used as usual to **select** items on the desktop and in menus, for **clicking and dragging** selected items around, and for **double-clicking** to open applications or documents.

- You will often find that the mouse-click sequence **left-right-left** will often be useful. For example: **left**, to select an object or file; **right**, to bring up a menu of functions to apply to it; **left**, to select the function to apply.

The Task Bar

The "Task Bar" is a new navigational aid in Windows95. It normally resides on the bottom of your screen and contains the Start Button. It can be dragged to any edge of the screen and resized as desired. It has several uses:

- The Start button opens a menu system that allows you access to various applications and control panels, as well as the help system, a search utility, and a list of documents you have recently edited. On a Waterloo Polaris workstation, if you choose Shut Down from the Start menu, you will exit Windows95 and go to a DOS prompt. To restart Windows95 type "win95". To Log off, type "logoff". You can also modify the Start Button menu to suit your needs (by right-click on an empty portion and choosing Properties from the menu).

- A new button is added to the task bar for every application you open. If you click on an application's button, it moves its window to the foreground. If you have minimized an application by clicking the minimize button ( ) at the top right corner of its window, you can restore it by clicking its button on the task bar.

- The task bar contains a clock and other small icons for utilities to adjust the sound level and screen resolution. Left-click once on these icons to run their programs.

- The WordPerfect **Desktop Applications Director** (DAD) also adds small shortcut icons for WordPerfect Office Suite applications to the task bar. If you like, you can add or remove items from this portion of the task bar using the DAD Properties icon. Just click on the DAD Properties icon to open its window. You can then select and delete items, or add items by using the Add button or by dragging items into the window.

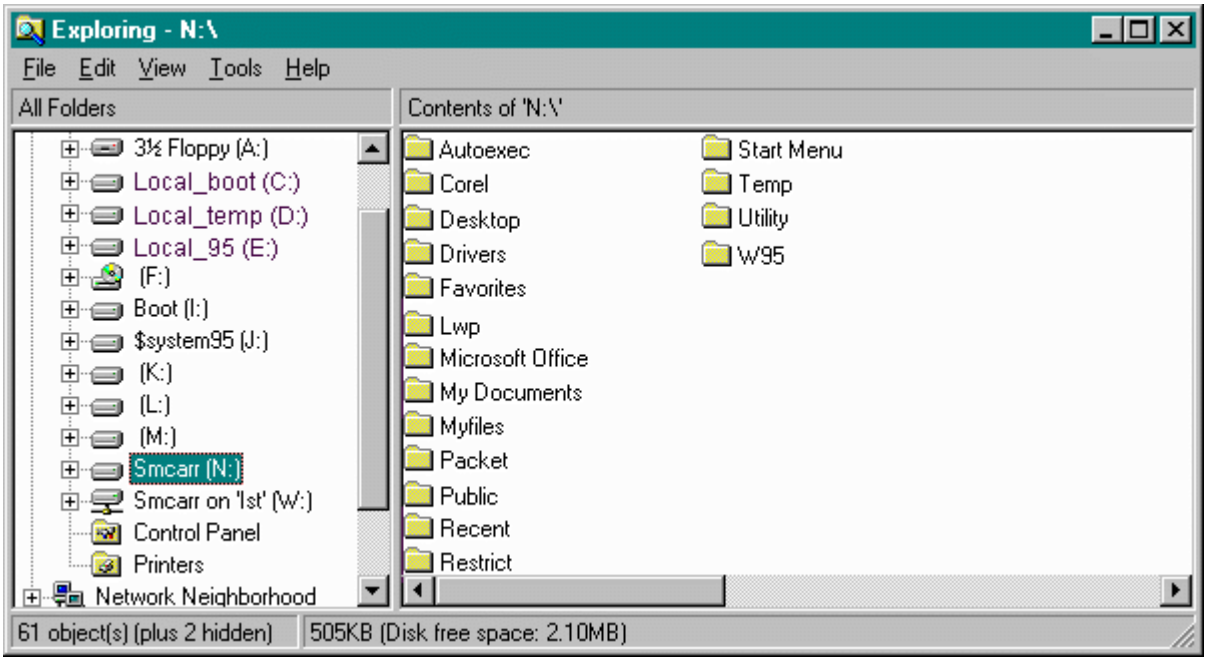
Drop-Down Menus, Button Bars and Pop-Up Help

Like in Windows 3.1, applications typically use **drop-down menus** at the top of a window to select operations. Many of the most commonly used functions in the menus are also available through a **button bar** (just under the menu bar). Usually, cryptic graphical icons on the button bar represent menu functions, but you can find out what the icons mean by placing the mouse cursor over the button and waiting for the **pop-up help** text. Many applications also have additional pop-up help, activated by clicking the "?" symbol in the upper right corner of the window title bar, or by selecting "What's This?" under the Help menu. Once pop-up help mode is activated, the cursor turns into a question mark and help text will appear about the next menu item or object clicked on.

File Management with Windows Explorer

Once you've started working with applications in Windows95, you will eventually need to do some file management tasks such as moving or copying. There are several ways to do file management in Windows. The recommended way is to use the **Windows Explorer** application, available under the Start menu under Programs (Start / Programs).

When you start **Explorer** you see a split window, with various available disk drives on the left and the contents of a selected disk on the right.



To perform file management tasks:

1) locate the file(s) you want, use the **left** mouse button to select files (Ctrl-click to select or deselect multiple files). There is also a Find function under the Tools menu.

2) **right**-click to bring up a menu of actions you can do on the selected files

3) **left-**click to select the function that you want to do with the files. Use “copy” to copy files and “cut” to move files.

4) if you are copying or moving files, use the left-hand and right-hand windows again to locate and select the new destination folder or disk with left mouse clicks. Right-click on the destination folder or disk and select Paste from the menu.

5) If you are **deleting files from your local hard disk (C or D) or your N drive**, the files are moved to the **Recycle Bin** and are not removed immediately. The Recycle Bin is located on the desktop. You can empty it from **Explorer** by locating it, then choosing Empty Recycle Bin from the File menu. If you are **deleting files from a floppy disk drive or from another mounted network drive** (such as your Web server), they are just deleted without first being sent to the Recycle Bin.

Waterloo Polaris Networking Functions

The networking programs on Waterloo Polaris are located from the Start menu on the task bar under Programs / Network Software. Other features, such as the ability to access a hard disk on a Unix or NT server, and printer selection, are available through the **Configure Waterloo Polaris** tool.

Email

Getting to Know Eudora

Eudora Light is the recommended email client. Eudora Light is partially pre-configured for you, but you will have to tell it your email server password the first time you try to read mail. Look up your email password in the Email section of the **Configure Waterloo Polaris** utility. You should also answer "yes" when asked on first use if you want to use Eudora Light as the default email program.

There are numerous configuration options for Eudora Light. If you ever need to change any settings, look under Tools / Options in the menus. You can get help from the program if you select an option and press the F1 function key. Most of the options are sensibly preconfigured for you, but let's look at the most important ones anyway:

"Getting Started" Dialogue Box

In order to read mail you must supply a POP account. This account is on the Unix server that handles your mail. POP stands for Post Office Protocol, the method by which the mail server delivers mail to your workstation. For example, in Engineering, the POP account is `userid@engmail.uwaterloo.ca`. You can choose to use another account for email if you have one.

In order to send mail you must supply the name of a Simple Mail Transfer Protocol (SMTP) server. This will usually be the same computer as the POP server, and you need not fill in the field.

"Checking Mail" Dialogue Box

There are numerous options under Checking Mail. Your local workstation must contact the mail server to see if you have any new mail. This can be done two ways: 1) only when you want to check, by clicking the Check Mail button in the Eudora Light button bar (the default behaviour), or 2) automatically, every set time period specified in the Checking Mail options. To minimize network traffic, we recommend that you set automated checking to an interval not less than 15 minutes. If you intend to access your mail from other than Waterloo Polaris workstations (e.g. from home) you should also make sure that you leave a copy of your mail on the server (not the default setting). Otherwise, after it is downloaded to your Waterloo Polaris home directory (under n:\mail) old mail will not be available from non-Waterloo Polaris computers — you will be able to see any new mail though. Note that Eudora tidies up the copy of your mail on the server as you read and delete messages it has downloaded via POP.

Also note that you have limited space on the mail server for storing files. If someone sends you mail with a big binary file attachment (e.g. a large Excel spreadsheet) you could easily exceed your disk space quota. The disk quota will prevent you from receiving new mail if things get too out of hand. Some mail servers run an automatic process which will truncate the longest mail messages to bring your Unix mailbox size back within quota.

Changing Your Email Account Password

Eudora Light is preconfigured to remember your password after you first supply one. To change your password, use **Telnet Presenter** or some other telnet program to log in to

your mail server. Log in using your old email password, and use the command **passwd** to change your password. If you change your email server password after it is first configured, you should run "Learn/Set Waterloo Polaris Email Password" in the Email section of the **Configure Waterloo Polaris** tool again to update Waterloo Polaris about the change.

Creating Mailing Lists

The Address Book under the Tools menu can be used to create mailing lists. Click on the New button to create a new list.

Converting Mailboxes and Mailing Lists to Eudora Format

To convert from Pine to Eudora, there are some tools available at www.ka.net/eudora. If you've been using the Watstar mail program, there is no way to convert mailboxes, but you will be able to cut and paste addresses individually from your old list into a Eudora address book.

Dealing with Attachments

Any attached binary files that arrive with a mail message are stored in N:\Mail\Attachments. The attached file will show up as a blue underlined text in the received message. You can view the attached file by double-clicking on the blue file name in the message. If Windows95 does not know which program to use to open the attachment, a browser will appear to let you select a program to use. Any easier way to view the attachment is to open the application it came from (assuming you know), then open the file from the N:\Mail\Attachments directory.

To send a message with an attachment, just click on the button bar item that looks like a paper clip and select the file you want to attach from the browser. You can attach more than one file to the same mail message.

Forwarding Your Mail

Log in to your mail server using **Telnet Presenter** (under Start / Programs / Network Software) then use a text editor such as **Pico** to create a file called .forward containing your forwarding address.

e.g. `pico .forward`

Alternately, use any text editor or word processor you like under Windows95 to create the .forward file (making sure to save it as text only), then use Rapid FTP (again under Start / Programs / Network Software) to place it on your mail server.

Vacationing Your Mail

If you are going to be away for any extended period, you can set up an automated response telling people that you are away. To do this you need to log in to your email server account and run the **vacation** command, which is currently a bit tricky on some email servers. We hope to make it easier in the near future. For help, please see a consultant in your faculty.

Printing

Selecting a Printer

Printers closest to you and/or preselected by you are automatically installed in Windows95 when you log on to your Waterloo Polaris account. You can select from the installed printers when you print from any Windows95 application.

The **Configure Waterloo Polaris** application allows you to view or change the installed printers during the current log-in session. If you change printers, it is best to quit any open applications first to make sure that they recognize the change.

Local printers (attached directly to your Waterloo Polaris station) can also be installed using the Add Printer utility under Start / Settings / Printers and by executing a **route** command in a privexec.bat file. This procedure is explained below.

The Waterloo Polaris Print Queues

Print queues for Waterloo Polaris network printers typically have names such as **laser@office**. When you print from an application to one of the Waterloo Polaris printers, a dialog box will appear asking if you want to print now or later or discard the print job. You may want to send all of your print jobs to the printer at the same time to keep them all together. If you select Print Later in the Waterloo Polaris print dialog box, your print jobs are not sent to the queue until you select Print Now on your final print job. You can select and discard any waiting print jobs. When you are ready to print a job or jobs, select the Print Now button in the Waterloo Polaris print dialog box. There is a check box in the Waterloo Polaris print dialog box which allows you to always send each job to the printer if you prefer not to queue multiple jobs.

Changing the Default Waterloo Polaris Printers

If you want **to temporarily print to a printer other than the automatically loaded ones**, run **Configure Waterloo Polaris** and make your changes there. These changes will only last for your current log-in session. Also note that open applications may not "see" the printer changes until they are closed and restarted.

To configure Windows95 to load printers other than the default ones each time you log in, create a file called **privexec.bat** in the root directory of your N drive and place the appropriate **route** command in it. Commands in this batch file are run each time you log on, before Windows95 starts up.

The **route** command used in a DOS shell (Start / Programs / MS-DOS Prompt) or privexec.bat file is used as e.g.

route lpt3 laser@sysoffice

The above example links **network port lpt3** to the **print queue** laser@sysoffice.

Configuring a Local Printer

For alocal printer attached to your workstation, it will be necessary (the first time) to add the correct print driver (Start / Settings / Printers / Add Printer) and indicate which parallel

port it is connected to (usually lpt1). Select "local printer" in the Add Printer Wizard and select the correct printer driver for the new printer. If in doubt, selecting the Apple LaserWriter Plus print driver will work for all black and white PostScript printers, but you will not have access to all of the features of your specific brand of printer.

The above procedure will work as long as you don't move around from workstation to workstation. If you intend to work at more than one workstation, your local computer technician will have to add some start-up configuration settings to your workstation.

Accessing Other Printers on the Campus Network

It is possible under Windows95 to print to printers accessible from Unix or NT servers you may have an account on. The Add Printer utility available under Start / Settings / Printers allows you to add such printers. Choose Add Printer and select "network printer". Using the Wizard, provide the network print queue in the form "\\host\queue_name", and select the correct driver for the printer.

Connecting to Remote Accounts and Shared Resources

Remotely Connecting to Unix

If you have a Waterloo Polaris account, you have at least one account on a Unix host (for email). Sometimes it is convenient to log in directly to a remote account to execute commands. Or you may just want to be able to store files on and retrieve files from Unix accounts. There are several ways to do these things from your Waterloo Polaris account.

Telnet

If you want to log in to a Unix account to run Unix programs from a text terminal, you can use **Telnet Presenter** under Start / Programs / Network Software. This program does text terminal emulation.

X Windows Emulation

If you need to run graphical software under Unix, you can use the **X-Server** application.

Connecting Via Samba

If your Unix host is running a Samba server, it can make your Unix account available to you as a disk drive letter. You can use the **Configure Waterloo Polaris** utility to set up automatic access to your Unix account (under the Sharing section). Just enter the SMB path to your account in the form \\hostname\userid. This operation will set up, say drive S, to be your Unix account, letting you save files there from applications or use Windows Explorer to manage files on your account.

This method is particularly useful for managing Web pages on a Unix Web server. As long as the Samba server is configured correctly, your Web pages will automatically have the correct permissions to be viewable from a Web browser. There is a special Web section in the **Configure Waterloo Polaris** utility to automatically set up access to your Web server as drive W on your workstation.

When you initially set up a Samba connection in this way, you are asked for your Unix account password. You also need to have a Windows password set in Windows95 for this feature to work.

A Samba connection allows you access to your files on your Unix accounts, but does not let you run Unix commands. To do that you need to log in directly using **Telnet** or **X-Windows** terminal emulation, described above.

Remotely Connecting to Windows NT Hosts and Win95 Stations

Windows95 has built-in connectivity to Windows NT servers and other Windows95 workstations on the campus network. Just make sure you have a Windows password set (see Passwords Associated with Your Account, above). Just locate the NT server or Windows95 workstation under Network Neighbourhood on your desktop (or from Windows Explorer) and enter your password when prompted.

You can also mount the remote file system as if it were a new drive letter on your workstation. You do this by locating the accessible folder on the server or workstation as above, then right-clicking on it and selecting Map Network Drive.

The **Configure Waterloo Polaris** utility can also be used to automatically mount a remote Windows NT file system as a drive letter on your workstation.

Sharing Files

There are several ways that multiple users can share files on Waterloo Polaris.

Two of these methods have already been mentioned above. If a shared account is set up on a Unix or NT host, then this can be accessed as described above by multiple users, and is the preferred method of sharing files on Waterloo Polaris.

The third way to share files is the same way it was done on the Watstar network. A shared user account is set up on a Waterloo Polaris file server with a shared read-write password. The shared account is accessed by issuing an **access** command in a DOS window (Start / Programs / MS-DOS Prompt), or automatically on log-in in a privexec.bat file:

e.g. access share@sysoffice secretpassword

Sharing a Printer

If you have a printer attached to your workstation, you can share it with others. Just locate the printer icon under Start / Settings / Printers, right-click its icon, and select Sharing. Anyone who knows the password you set can use your local printer.

You can also access a printer attached to a Unix host, if the administrator has allowed it.

Remotely Connecting to Watvms

You need to use a IBM 3270 terminal emulator program to connect to the old Watvms system. This terminal emulator is located in Start/Programs/Network Software/ Terminal Emulators. Please contact a consultant to help you get the program configured properly.

Transferring Files Via File Transfer Protocol (FTP)

An alternative to establishing a Samba connection or using built-in Windows networking to transfer files between accounts is FTP. The **Rapid FTP** program (under Start / Programs / Network Software) provides an easy graphical interface which allows you to transfer files by drag-and-drop.

Installing Your Own Software

It is possible to install your own software on an office workstation — but hopefully this is not often required. Your workstation's internal hard disk is partitioned into at least three sections (drives C through F). Some or all partitions may be initially write protected. Exactly where you install your software depends on how much space you have in each partition and where the software will allow itself to be installed.

Warning: Please discuss your additional software needs with the computer technician in your department before you attempt to install your own software. It is usually appropriate to install such software on the "departmental" disk of your department's file server, or in another location on the network, such as your N drive. For faculty and staff, it may be possible to get more space on drive N if you need it. Software installed on your local hard disk is not automatically backed up or updated. Similarly, data files stored on your local hard disk are at risk of being lost. Network drives, such as your N drive, are automatically backed up to tape and are the safest place to store your data.