# Now Up-to-Date™ & Contact®

Version 3.6

# Administrator's Guide

## Copyright



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Now Software warrants that the disks on which this software is recorded are free from defects in material and workmanship, under normal use for 90 (ninety) days after the date of original purchase. If a defect occurs during the 90-day period, you may return the disks to Now Software for a free replacement. **Now Software will replace the disks provided that you have previously returned your product registration card to Now Software.** The remedy for breach of this warranty shall be limited to replacement and shall not encompass any other damages, including but not limited to loss of profit, and special, incidental, or other similar claims. The software is licensed and delivered on an "as is" basis. Except for the express warranty set forth above, Now Software makes no other warranties, either express or implied, by statute or otherwise, regarding the enclosed computer software product, its quality, its performance, its merchantability, or its fitness for any particular purpose.

# Table of Contents

# Introduction

Now Up-to-Date & Contact version 3.6 uses server technology to allow users to share Events and Contacts. As system administrator, you should be familiar with server installation, setup and maintenance in order to maintain Public Events and Contacts effectively. Aside from periodic backups of the server database to protect your public data, the servers require minimal attention.

## System requirements

Now Up-to-Date & Contact and the Public Event and Public Contact Server applications are fully tested and designed to work on any Macintosh meeting the requirements listed in this section.

### Now Up-to-Date requirements

- All Macintosh models with 68030 CPU or higher (Now Up-to-Date is accelerated for Power Macintosh where applicable)
- 1.5 MB of available RAM
- 2 MB of available hard disk space (3 MB for Power Macintosh installation)
- System 7.1 or later

### Now Contact requirements

- All Macintosh models with 68030 CPU or higher (Now Contact is accelerated for Power Macintosh where applicable)
- 1 MB of available RAM
- 3 MB of available hard disk space (4 MB for Power Macintosh installation)
- System 7.1 or later

# About this Administrator’s Guide

This Administrator’s Guide includes general information on Now Up-to-Date & Contact administration, and complete information on installing, configuring and using the server applications, as well as troubleshooting information.

This Administrator’s Guide assumes you know how to use the Macintosh to open applications, copy files, and open control panels and Chooser devices. A working understanding of System 7 features is important as well. If you’re new to the Macintosh, refer to your Macintosh documentation for additional information.

*If you purchased Now Up-to-Date version 3.6 separately, simply disregard the information pertaining to Now Contact in this Administrator’s Guide.*

## Notes and Tips

We’ve placed special icons in the left margin throughout this Administrator’s Guide to draw your attention to important points about using Now Up-to-Date & Contact and the Public Event and Public Contact Servers.

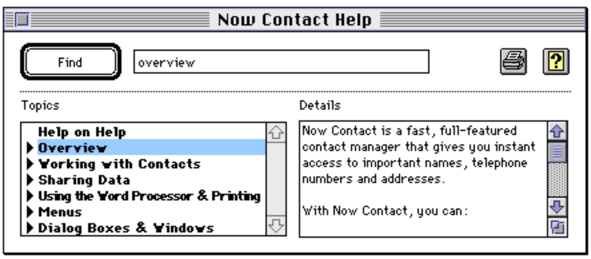
*Text accompanied by this icon indicates something that is important for you to know about the software in order to ensure that you’re successful in using it or to avoid problems.*

*Text accompanied by this icon informs you of a special or little-known feature, or of a particularly time-saving Now Contact function.*

# Online Help

Context-sensitive online Help is available in Now Up-to-Date & Contact and the server applications. You can click the “Help” button in the dialog boxes to get information on the feature you’re currently using.

The online Help includes a Find feature that lets you search for a topic by typing the first few letters of its title. Help topics are structured so that you can reveal or hide any subtopics they contain, and you can print any of the topics with the click of a button.



For more information on using online Help choose “Help…” from the Window menu in Now Up-to-Date or Now Contact, or click the “Help” button in the server status window, then select the “Help on Help” topic. (If you don’t see “Help on Help” in the Help window’s Topics list, type *help* in the text field and click “Find.”) In addition to online Help, the buttons in Now Up-to-Date & Contact’s Toolbars and the server status window include Tool Tips—short identifying labels that appear whenever you pass the pointer over each button.

*The “Public Event Server Help” and “Public Contact Server Help” files that are copied to your hard disk during installation must be in the same folder as their respective server application, or online Help won’t be available for the server. The help files are installed into the correct folders by default.*

# Technical support

If you can’t find the answer to your question in this Administrator’s Guide or the online Help, you may wish to use one of our technical support options. When contacting us for technical support, please be prepared to provide the following (and be at your Macintosh when contacting us by telephone, if possible):

- Your registration number, located on your registration card.
- A description of your problem—with as much detail as possible.
- A profile of your Macintosh. See the next section, “Creating a Profile,” for more information.

The available technical support options are as follows:

- Our automated list server provides answers to your support questions. Just send email to help@nowsoft.com and the server will automatically send you instructions on how to use this service.
- For no charge you can use our NowFax Document Retrieval System at 800-730-7860 or 503-274-6370. This system provides faxed answers to most support questions, as well as troubleshooting guides compiled by our support technicians.
- Our America Online forum (Keyword “Now”) provides many useful support resources, including a growing KnowledgeBase and help documents.
- Our World Wide Web site (http://www.nowsoft.com) includes a large number of free technical support documents, viewable online.
- Finally, Now Software provides free telephone support for a limited time after your first call. After the free support period ends, you can choose from a number of paid telephone support plans that we have set up to address the needs of our varied users. For technical support on Now Up-to-Date, call 503-796-3619; for support on Now Contact, call 503-796-3620. Now Software Technical Support is available from 6:00 AM to 5:00 PM Pacific Standard Time.

# Chapter 1

# Techniques and Concepts

This chapter provides information and guidance regarding how you can help your workgroup use the Now Up-to-Date & Contact networking features most effectively.

## Now Up-to-Date & Contact administration

There are some steps you can take to ensure that your workgroup is using Now Up-to-Date & Contact in a consistent and productive manner.

### Installing Now Up-to-Date & Contact over the network

Your users can install Now Up-to-Date & Contact directly from a network server. It's easy to set up a network file server for this type of installation.

On the server volume, create a folder called Now Up-to-Date & Contact Network Install and drag the items from the Now Up-to-Date & Contact disc into the folder. Once you've copied all the items, your users can install Now Up-to-Date and/or Now Contact by opening the folder you created and double-clicking the Now Installer. Be sure to provide your users with complete instructions on installing in this manner.

! *If you purchased Now Up-to-Date separately, create a folder named Now Up-to-Date Network Install and drag all the items from the disc into the folder.*

### Standardizing Now Up-to-Date & Contact usage

You may want to standardize how your users work in Now Up-to-Date & Contact, either by specifying standard Categories and Sets to use, standard Calendar Formats and Detail Layouts, and so on. Once you've determined which components you want to standardize, you can set up a Calendar File and a Contact File and distribute them and any preferences files that apply. The preferences files are located in the Now Up-to-Date Prefs and Now Contact Prefs folders in your Preferences folder.

Refer to your *Now Up-to-Date & Contact User's Guide* for details on Categories, Sets, Calendar Formats, Detail Layouts and other Now Up-to-Date & Contact components.

# Server administration

The Public Event Server and Public Contact Server are the application components of Now Up-to-Date & Contact that allow you to share schedule and Contact information. Their databases store Public Categories and the Public Events and Public Contacts they contain, as well as information on the available users, conference rooms and resources for Group Scheduling. To make Public Categories and Group Scheduling items available to your workgroup, you need to install the server applications on a networked Macintosh, then open the applications and set them up. Once configured, the servers can then be managed from any networked Macintosh. Password protection lets you ensure that only you can make changes to the configuration.

## The server Macintosh

The server is a Macintosh on your network (either a dedicated server or a user workstation) on which you've installed the Public Event Server and/or Public Contact Server application. Each server Macintosh requires some disk space as a work area—up to 1 MB for a busy server.

There is no specific limit to the number of users that can be supported by a single server Macintosh; however, the faster the central processor and the more RAM a Macintosh has, the more users it can support efficiently. A Public Event Server Macintosh that is set up to facilitate Group Scheduling will usually have greater CPU and RAM demands than one that is storing and updating Public Categories and Public Events only. See "Server performance" in the Appendix, "Tips and Troubleshooting," for more information on the best Macintosh to use for your Public Event and Public Contact Servers.

*You can run more than one Public Event Server on a single Macintosh only if you open the server applications in the same order each time. There is no such restriction for Public Contact Servers—open them in any order you like.*

*Also be aware that your Macintosh has a limit of 64 TCP/IP connections. Each Public Event and Public Contact Server that allows TCP/IP connections takes up 16 of the 64 connections, and every server configured as a Web publishing server uses an additional 16 connections. Keep these restrictions in mind if you run more than one server on a single Macintosh.*

## The server database

The server applications automatically create separate database files the first time you open them. These database files store all Public Categories and the shared Events and Contacts they contain. The database file on a Public Event Server Macintosh set up for Group Scheduling also stores information on users, Resources and Conference Rooms. Public Contact Servers also create a history file that tracks modifications to the server database.

The names of these database files consist of their server names followed by ".db"; the Public Contact Server history files consist of their server names followed by ".his". By default, the filenames are Public Event Server.db, Public Contact Server.db and Public Contact Server.his. See Chapter 3, "Server Setup," for details on naming the servers. The database files are automatically saved at regular intervals.

The server options let you set automatic backups of the database files, with backup filenames and locations that you specify. Once you've done so, the database files are automatically backed up at 12:00 midnight as long as the servers are running (see Chapter 3, "Server Setup," for details on specifying backup files). In addition to the automatic backups, you should back up the database files periodically by dragging them to a floppy disk or other backup media. (You don't need to back up the server *applications* to protect your Public Categories, Events and Contacts.)

## Controlling multiplying Categories

As your users get to know Now Up-to-Date & Contact better, and they realize the benefits of classifying Events and Contacts into different Categories, you're likely to see many Public Categories getting created for different purposes. Of course, you can control this quite directly by setting a password for Category creation on every Public Event Server and Public Contact Server, but if you take a more open approach you may find that users simply need a little guidance on how best to use Categories.

At times, your Now Up-to-Date users will want to create Public Categories named for themselves, so that everyone can "see their schedule." While this can be useful, the best way for users to share schedule and availability information is for each user to set up Group Scheduling, which has built-in features for viewing Meeting attendees' free time blocks. In addition, when subscribing to Public Categories with the Sets feature, users can choose the "Include all Events that block my free time" option, which ensures that Events that they've marked as attending will appear in their calendar Views, even if the Meeting originated in a Category to which they did not subscribe. These features offer enough flexibility to discourage users from creating an unwieldy number of Categories in Now Up-to-Date.

# Setting up multiple servers

There's really no limit to how many Public Event Servers and Public Contact Servers you can install on your network. Having more servers installed entails more administration, but it also has the benefit of letting you categorize Public Events and Contacts into smaller, more specific areas. While Categories already allow this, the servers act almost as second-level Categories, allowing you to divide Events and Contacts into functional areas of your workgroup (Marketing, Development, Sales, and so on), or into other divisions, and still have Categories within those groups. Of course, the server workload is also better distributed among multiple machines this way as well.

*While you can have multiple Public Event Servers installed on your network, we recommend that only one of them be set up as the server designated for Group Scheduling, and that its name somehow reflect this specific purpose. This way, when your users are starting the process of setting up for Group Scheduling, they know quickly which server to connect to and you avoid confusion at this early stage.*

## Publishing Events and Contacts on the World Wide Web

If you purchased the Now Up-to-Date Web Publisher, your Public Event and Public Contact Servers can publish calendars and address books on World Wide Web pages. The server applications automatically generate HTML (Hypertext Markup Language) files for the Calendar and Contact information you specify; the information can then be viewed and copied from many Web browsers. See Chapter 5, “Web Publishing Setup,” for details on setting up Web publishing services.

*Web publishing services are available only in the Now Up-to-Date Web Publisher. If you’d like more information on the Now Up-to-Date Web Publisher, visit our Web site at http://www.nowsoft.com or call 1-800-237-2078.*

# Chapter 2
# Server Installation

This chapter describes how to install the Public Event Server and Public Contact Server applications.

*If you purchased Now Up-to-Date separately, only the Public Event Server is available for installation. If you purchased the Now Up-to-Date & Contact bundle, both server applications can be installed. The instructions in the following section cover bundle installation.*

## Installing the server applications

Installing the server applications is simple—the Now Installer application places the Public Event Server and Public Contact Server software and related items in the locations you specify.

*Before upgrading from earlier versions of the server applications, make a note of the server passwords and the backup filenames from the Server Configuration dialog box (available by choosing Setup… from the Server menu). After the upgrade installation is complete, enter the password and backup file information into the new Server Configuration dialog box.*

*If you customized the name of the previous version of the server, rename your version 3.6 server with that custom name.*

**To install the server software:**

**1.** Restart the Macintosh while holding down the Shift key to disable extensions.

*This step is very important—installing any new software product while other extensions are active can result in corrupted files and other problems.*

**2.** Insert the Now Up-to-Date & Contact disc into the CD-ROM drive.

3. Double-click the Now Installer icon to open the application.

   A splash screen dialog box appears.

4. Click Continue to proceed with the installation.

   A license agreement dialog box appears. To proceed with the installation, click Continue to indicate that you agree to the standard terms of this agreement. (You can also save or print the agreement.)

   A scrolling window listing the software components appears.

5. Select components for installation as desired. Hold down the Shift key to select more than one component.

   You can install the server applications alone, or you can install Now Up-to-Date & Contact and their server applications.

   *You need to install Now Up-to-Date & Contact along with the server applications in order to set up your server Macintosh, unless you plan to run Now Up-to-Date or Now Contact from a different networked Macintosh to do your server setup.*

6. Click Install.

   A dialog box appears prompting you to install the appropriate software for your Macintosh—PowerPC, 680x0 or Universal (for software that will work on either Macintosh type).

7. Click the appropriate button for your Macintosh.

   A directory dialog box appears.

8. Select the folder where you want to install the software.

9. Click Install to begin the installation.

   Installation begins and the Installer displays a progress dialog box. When the installation is complete, the Now Installer displays a results dialog box.

10. Click Quit to exit the Now Installer.

    If you installed Now Up-to-Date & Contact along with the server applications, a message appears indicating that the installation won't take effect until you restart.

    *You can also click Continue… at this point if you want to install the software onto another volume.*

11. Click Restart.

    The Macintosh restarts.

    Once your Macintosh has restarted, you need to configure the Public Event Server and Public Contact Server. See Chapter 3, "Server Setup," for details.

# Chapter 3

# Server Setup

This chapter explains how to set up the Public Event and Public Contact Servers for network use. It describes how to use the server applications and create Public Categories.

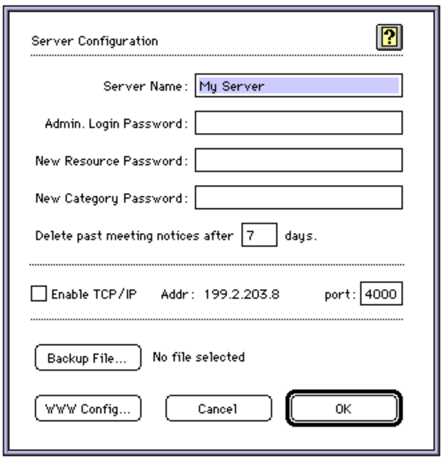
## Setting up the Public Event Server

The first time you open the Public Event Server application, it prompts you to enter some basic information and then saves that information. When you or any network users make subsequent changes to the Public Event Server, such as adding Users or Resources or adding and modifying Public Events, those changes are stored in the database.

### To set up the Public Event Server:

**1.** Double-click the Now Up-to-Date Server icon to open the application. (Skip this step if the server application opens automatically at startup.)

The Server Configuration dialog box opens.



*If the server Macintosh was running a version 2.x,  3.0 or 3.5 Public Event Server before you installed version 3.6, the Public Event Server application opens and converts the old database before opening this dialog box.*

**2.** Set options in the dialog box as desired for this Public Event Server Macintosh.

You can enter passwords and click OK, or click OK to log in immediately to the Public Event Server. Once you've logged in, you can open this dialog box again and set or change passwords.

| To… | Do this… |
|---|---|
| Set these options later | Click OK. |
| Name or rename the Public Event Server | Type the desired name in the Server Name text field. |
| Protect the server from unauthorized access | In the Admin. Log-in Password field, type the password, if any, required to gain access to this Public Event Server. |
| Restrict the creation of meeting resources | In the New Resource Password field, type the password, if any, required to add Users, Conference Rooms and Resources for Group Scheduling. |
| Restrict the creation of Public Categories | In the New Category Password field, type the password, if any, required to create Public Categories. |
| Limit the number of stored Meeting notices | Enter a number in the "Delete past Meeting notices after *xx* days" field. |
| Allow users to connect via TCP/IP | Select Enable TCP/IP. You can also specify a port for TCP/IP connections, but we recommend using the default port setting. *If you're running  more than one server on this Macintosh, you must specify a different TCP port for each server.* |
| Back up the database file automatically | Click Backup file… and specify a name and location for a nightly backup of the Public Event Server's database file. |
| Enable World Wide Web publishing | Click WWW Config… and select the settings as desired. See Chapter 5, "Web Publishing Setup," for details. |

*Password-protecting the Public Event Server is completely optional. As the network administrator, you decide how much access you want to allow those connecting to the Public Event Server. We recommend, however, that you at least set a password for Admin. Log-in to secure the system.*

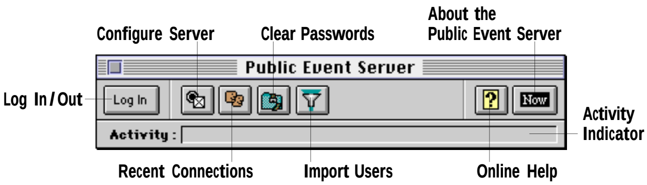
3. When you’re finished making configuration changes, click OK.

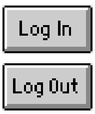
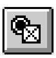
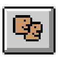
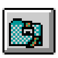
   The Public Event Server status window appears. See the next section for information on using this window. Be sure to provide your Now Up-to-Date users with the server New Category password so that they can create Public Categories and Events.

## Using the Public Event Server application

There are some administrative operations that you can perform from a remote Macintosh using Now Up-to-Date. Certain tasks, however, must be done directly within the Public Event Server application.

To set Public Event Server options, open or switch to the Public Event Server application; the Public Event Server status window appears.




| Use this option… | | To… |
|---|---|---|
|  | **Log In/Log Out** | Gain access to server administration functions.<br>If you’ve set up a log-in password, you’ll be required to enter it when you click Log In. Once you’ve logged in, the button changes to Log Out.<br> *To log in quickly, click the button for the function you want to use. If the application’s password-protected, type the password to go directly to the desired area.* |
|  | **Configure Server** | Open the Server Configuration dialog box, explained in the previous section. |
|  | **Recent Connections** | Open a dialog box listing users who have recently connected to the Public Event Server. You can select users and click Disconnect to free up access for other users and maintain the maximum number of users permitted by your user license. |
|  | **Clear Passwords** | Clear the password protection for any Public Categories, Users, Resources or Conference Rooms. |
|  | **Import Users** | Import names and other essential data for the users on your network from a text file. See “Importing Group Scheduling items” in Chapter 4, “Group Scheduling Setup,” for information on using this function. |
| Activity status bar | | Monitor server activity. The indicator moves as users connect to and disconnect from the server, and as Categories, Conference Rooms and Resources are created or modified. |

Leave the server application running so it’s available to your network users at all times.

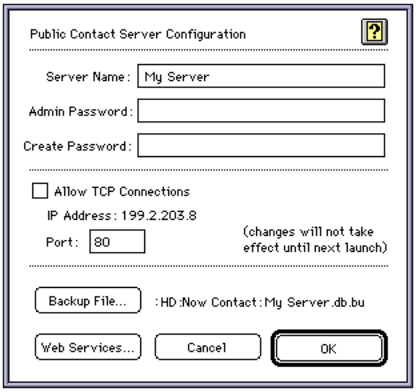
# Setting up the Public Contact Server

The first time you open the Public Contact Server, you need to enter basic information.

### To set up a Public Contact Server:

**1.** Double-click the Now Contact Server icon to open the application. (Skip this step if the server application opens automatically at startup.)

The Public Contact Server Configuration dialog box opens.




**2.** Set options in the dialog box as desired for this Public Contact Server Macintosh.

You can enter passwords and click OK, or click OK to log in immediately to the Public Contact Server. Once you've logged in, you can open this dialog box again.

| To… | Do this… |
|---|---|
| Set these options later | Click OK. |
| Name or rename the Public Contact Server | Type the desired name in the Server Name text field. |
| Protect the server from unauthorized access | In the Admin Password field, type the password, if any, required to gain access to this Public Contact Server. |
| Restrict the creation of Public Categories | In the Create Password field, type the password, if any, required to create Public Categories. |
| Allow users to connect via TCP/IP | Select Allow TCP Connections. You can also specify a port for TCP/IP connections, but we recommend using the default port setting. |

*If you're running more than one server on this Macintosh, you must specify a different TCP port for each server.*

*continued on next page*

| To… | Do this… |
|---|---|
| *continued from previous page* | |
| Back up the database file automatically | Click Backup file… and specify a name and location for a nightly backup of the Public Contact Server's database file. |
| Enable World Wide Web publishing | Click Web Services… and select the settings as desired. See Chapter 5, "Web Publishing Setup," for details. |

*Password-protecting the Public Contact Server is completely optional. As the network administrator, you decide how much access you want to allow users connecting to the Public Contact Server. We recommend, however, that you at least set a password for Admin to secure the system.*

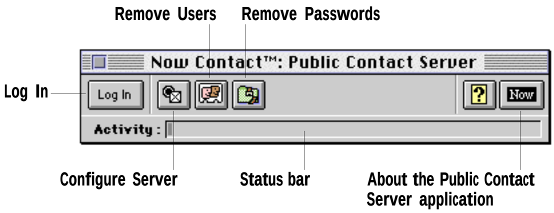
**3.** Click OK.

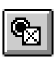
The Public Contact Server status window appears; see the next section for information on using this window. Be sure to provide your networked Now Contact users with the server Create password so that they can create Public Categories and Contacts.

## Using the Public Contact Server application

There are some administrative operations that you can perform from a remote Macintosh using Now Contact. Certain tasks, however, must be done directly within the Public Contact Server application.

To set Public Contact Server options, open or switch to the Public Contact Server application; the Public Contact Server status window appears.




| Use this option… | | To… |
|---|---|---|
|   | **Log In/Log Out** | Gain access to server administration functions.<br>If you've set up a log-in password, you'll be required to enter it when you click Log In. Once you've logged in, the button changes to Log Out.<br>*To log in quickly, click the button for the function you want to use.* |
|  | **Configure Server** | Open the Public Contact Server Configuration dialog box, explained in the previous section. |

*continued on next page*

| Use this option… | To… |
|---|---|
| *continued from previous page* | |
| **Remove Users** | Open a dialog box listing users who have recently connected to the Public Contact Server. You can select users and click Purge to free up access for other users and maintain the maximum number of users permitted by your user license. |
| **Remove Passwords** | Clear the password protection for any Public Categories on the server. |
| Activity status bar | Monitor server activity. The indicator moves as users connect to and disconnect from the server, and as Categories are created or modified. |

Leave the server application running so it's available to your network users at all times.

*To close the Public Event Server or Public Contact Server status window without quitting the server application, choose Close Status Window from the File menu (choose Open Status Window to reopen it).*

# Setting up Public Categories

Your users share Events and Contacts that are assigned to Public Categories. Creating Public Categories on the server Macintosh is a good way to encourage users to assign Events and Contacts relating to particular subjects to certain Categories. Refer to Chapter 15, "Using Now Up-to-Date & Contact on a Network," in the *Now Up-to-Date & Contact User's Guide* for details on creating Public Categories. (The Public Contact Server application automatically creates a single default Now Contact Public Category during installation and set up.)

*You must create at least one Public Category for Now Up-to-Date in order for Group Scheduling to take place in your workgroup.*

## Using Public Category passwords

Public Categories can be set up so that passwords are required to view, modify, move or delete Events and Contacts assigned to them. The Public Event Server and Public Contact Server applications allow you to clear the passwords for all Public Categories on the servers. This is useful in case you need to modify a Public Category or its Events or Contacts, or alter a password for a Public Category when the Category's creator has forgotten it. See "Using the Public Event Server application" and "Using the Public Contact Server application" earlier in this chapter for information on clearing passwords, and refer to Chapter 15, "Using Now Up-to-Date & Contact on a Network," in the *Now Up-to-Date & Contact User's Guide* for details on setting passwords for Public Categories.

# Chapter 4
# Group Scheduling Setup

This chapter describes how to set up a Public Event Server for Group Scheduling, and import Group Scheduling items into your server from text files.

## Setting up Group Scheduling

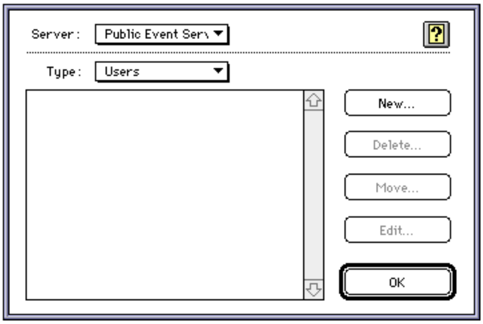
If your new Public Event Server is intended to support Group Scheduling, the next step after installation and set up is to define the network users who will participate in Group Scheduling, and the items that will be available for Meetings (Resources and Conference Rooms).

You must create a Public Category in Now Up-to-Date in order for Group Scheduling to take place in your workgroup. See Chapter 3, “Server Setup,” for details.

#### To define Group Scheduling Users, Resources and Conference Rooms:

**1.** In Now Up-to-Date, choose Administration… from the Meeting menu.

The Administration dialog box opens.




**2.** Choose the name of your new Public Event Server from the Server: pop-up menu.

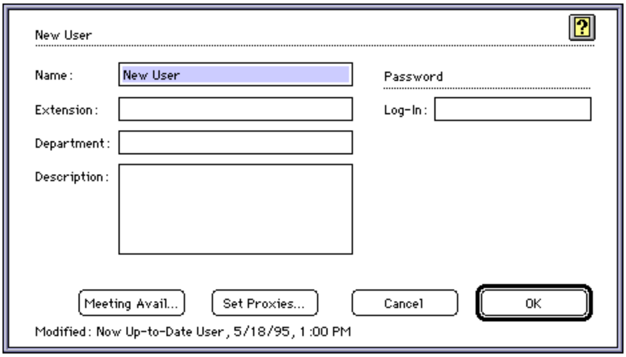
**3.** Choose Users from the Type: pop-up menu.

The scrolling list appears blank, because no Group Scheduling items have yet been created on this Public Event Server.

*If you have many Users to add to your Public Event Server (and Resources or Conference Rooms as well), you can save a great deal of time by placing information on these items in a text file and importing that file into the Public Event Server application. For details, see the next section, "Importing Group Scheduling Items."*

**4.** Click New….

The New User dialog box opens.




**5.** Type the user's name in the Name field.

You can also fill in the optional information in the fields below it if you wish.

**6.** Set a Log-In password for the user, if desired.

Setting a Log-In password means that users will need to enter that password the first time that they set up a Calendar File for Group Scheduling in Now Up-to-Date, as well as to assign a Proxy or modify Meeting Availability settings.

**7.** Set the other available options for this user if you wish.

| Click… | To… |
|---|---|
| **Meeting Avail…** | Open the Meeting Availability dialog box where you can indicate the hours the user is available for Meetings. |
| **Set Proxies…** | Open the Proxy List where you can select a Proxy to act on behalf of the user. |

**8.** Click OK.

You're returned to the Administration dialog box.

*If you set up a password for creating Group Scheduling items (Users, Conference Rooms and Resources) on the server, you'll be prompted to enter that password now to confirm the new User. You won't have to enter it when creating subsequent items, until you close the file.*

9. Repeat steps 4 through 8 to define additional users.
10. Choose Resources from the Type: pop-up menu, then repeat steps 4 through 8 for each Resource that you want to define.

    Resources can be equipment, supplies, or refreshments that are required for a Meeting.
11. Choose Conference Rooms from the Type: pop-up menu, then repeat steps 4 through 8 for each Conference Room that you want to define.

    Create a Conference Room to match every meeting room that's available to your workgroup.

    ! *You can't modify Availability settings for Resources or Conference Rooms—they're always available unless another Meeting is already scheduled. You can set Proxies for Resources and Conference Rooms, however, to ensure that someone is responsible for monitoring the Resource and Conference Room schedules.*
12. Click OK.

# Importing Group Scheduling items

It's easy to get user names and information into your Public Event Server without having to enter each one individually. If you're running an e-mail system, or any other network application that maintains a list of the users in your workgroup, you may be able to export a list of those users that you can then import into the Public Event Server with a minimum of preparation. You can also include information on your Conference Rooms and Resources in this file, to make your data entry process even easier.

The text file that you import should include information on each user, Conference Room or Resource in a specific format. This must appear on one line, with each "field" of information separated from the other by a Tab. Place a Return at the end of each line before starting a new item's information.

Include information for each item as follows:

- Type (must be *user*, *room* or *resource*)
- Name
- Log-In Password (optional—place a blank Tab here if no password is desired)
- Description (user functions/responsibilities; Conference Room location/furnishings; Resource function or usefulness)
- Capacity (applies only to rooms, but must appear as at a blank Tab in other entries)
- Office telephone extension (probably irrelevant to resources—place a blank Tab here if so)
- Department/Location

A few lines from an example file might read:

user<Tab>Julia Gonzalez<Tab>stereo<Tab>Public Relations Manager<Tab><Tab>123 <Tab>Marketing, Office 203<Return>

room<Tab>Skyline Room<Tab>bad dog<Tab>Big table, leather chairs<Tab>12<Tab>197 <Tab>Front of office, behind Reception<Return>

resource<Tab>VCR/TV Combo<Tab>sonic<Tab>19-inch screen, built-in speakers, VHS, remote<Tab><Tab><Tab>Multimedia storage closet<Return>

Once you've prepared your file for importing, switch to the Public Event Server application (after moving to a different Macintosh, if necessary), and click the Import Users button in the Public Event Server's Toolbar. A directory dialog box opens in which you can locate and select the file to import. When the file is selected, click Import—the Public Event Server displays a progress bar until importing is complete.

You can verify that importing was successful by switching to the Now Up-to-Date application and choosing Administration… from the Meeting menu to open the Administration dialog box. Choose your Public Event Server's name from the Server: pop-up menu, and choose Users from the Type: pop-up menu. The users you imported should appear here. Choose other items from the Type: pop-up menu if you imported Resources and/or Conference Rooms as well.

## Modifying items in the Administration dialog box

In the Administration dialog box, you can modify any item in a Category, User, Resource or Conference Room list by selecting the item in the scrolling list and clicking the button for the function you want to carry out.

| Click… | To… |
|---|---|
| **Delete…** | Delete the selected item. |
| **Move…** | Move the selected item to another server. |
| **Edit…** | Open an Info dialog box for the selected item where you can modify the information associated with it (name, purpose, passwords and so on). |

# Chapter 5

# Web Publishing Setup

This chapter describes how to set up your Public Event and Public Contact Servers to publish Events and Contacts on World Wide Web pages. Once they're set up, the server applications automatically create the HTML files that make up your Web pages. Published Events and Contacts are generated in the Versit™ standard data exchange format, which allows users to copy them directly from your Web pages.

*The Web publishing services described in this chapter are available only in the Now Up-to-Date Web Publisher. For more information on the Now Up-to-Date Web Publisher, visit our Web site at http://www.nowsoft.com or call 1-800-237-2078.*

## Setting up Now Up-to-Date Web publishing

You can enable Web publishing services when you set up your Public Event Server for the first time, or at any point afterward.

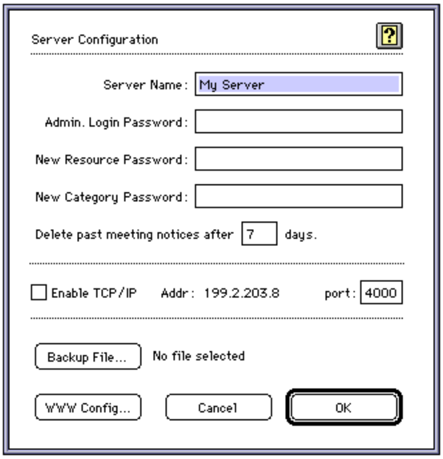
### To set up Public Event Server Web publishing:

1. Double-click the Now Up-to-Date Server icon to open the application.

   The Public Event Server status window appears.

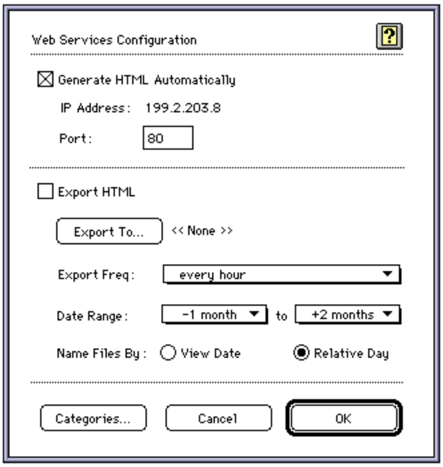
2. Click the Configure Server button in the Toolbar.

The Server Configuration dialog box opens.




**3.** Click the WWW Config… button.

The Web Services Configuration dialog box appears.




*You'll be prompted to enter your Now Up-to-Date Web Publisher serial number the first time you click this button. The serial number is located on the registration card included in your package.*

**4.** Set the Web publishing options in the dialog box as desired.

Once you've set options, you can open this dialog box again to change them.

| To… | Do this… |
|---|---|
| Use your Macintosh as a Web server | Select Generate HTML Automatically. For more information on this option, see “Generating HTML automatically vs. exporting HTML” later in this chapter.<br><br>You can specify a TCP port for Web connections, but we recommend using the default port setting.<br><br>*If you enabled TCP/IP connections when you set up your Public Event Server, use a different TCP port setting for your Web server.* |
| Export Web page files | Select Export HTML. For more information on this option, see “Generating HTML automatically vs. exporting HTML” later in this chapter. |
| Select a folder for exported files | Click Export To…. Select the folder you want your Web page files exported to in the directory dialog box, then click Save. See “Using exported files” later in this chapter for information on what gets exported to this folder. |
| Specify how often to export | Choose an option from the Export Frequency pop-up menu. If your published Events change frequently, select a higher frequency. |
| Specify a month range to export | Choose an option from the Date Range pop-up menus. The wider the range, the more Events are exported and published. |
| Specify how to save exported files | Select a Name Files By option. View Date saves each Calendar View and Event as a unique file. Relative Day replaces the files each month. |
| Select Public Categories to publish | Click Categories…. Select the Public Categories you want to publish in the Web Page Configuration dialog box that appears.<br><br>*You can assign different Web page headers and/or footers for the Categories you publish. See “Changing headers and footers by Category” later in this chapter for details.* |

**5.** When you’re finished setting up Web publishing, click OK.

You're returned to the Server Configuration dialog box.

6. Click OK.

   You're returned to the server status window.

# Setting up Now Contact Web publishing

You can enable Public Contact Server Web publishing when you set up the server for the first time, or any time afterward.

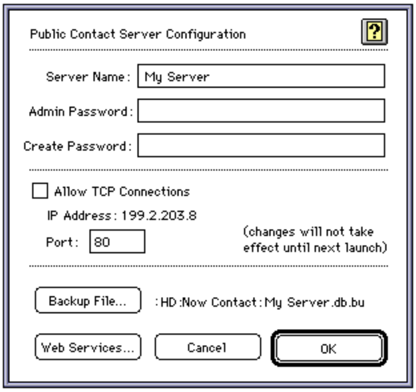
### To set up Public Contact Server Web publishing:

1. Double-click the Now Contact Server icon to open the application.

   The Public Contact Server status window appears.

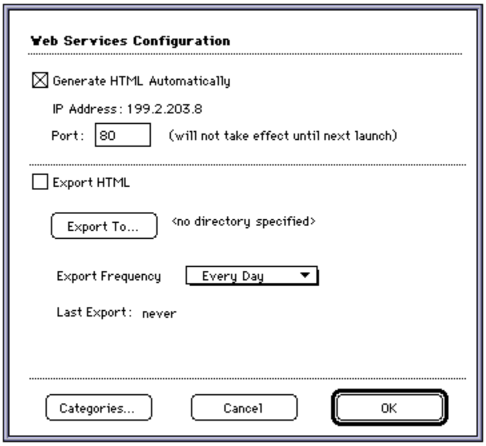
2. Click the Configure Server button in the Toolbar.

   The Public Contact Server Configuration dialog box opens.




3. Click the Web Services… button.

   The Web Services Configuration dialog box appears.



*You'll be prompted to enter the Now Up-to-Date Web Publisher serial number the first time you click this button. The serial number is located on the registration card included in your package.*

**4.** Set the Web publishing options in the dialog box as desired.

Once you've set options, you can open this dialog box again to change them.

| To… | Do this… |
|---|---|
| Use your Macintosh as a Web server | Select Generate HTML Automatically. For more information on this option, see "Generating HTML automatically vs. exporting HTML" later in this chapter.<br><br>You can specify a TCP port for Web connections, but we recommend using the default port setting.<br><br>*If you enabled TCP/IP connections when you set up your Public Contact Server, use a different TCP port setting for your Web server.* |
| Export Web page files | Select Export HTML. For more information on this option, see "Generating HTML automatically vs. exporting HTML" later in this chapter. |
| Select a folder for exported files | Click Export To…. Select the folder you want your Web page files exported to in the directory dialog box, then click Export To This Folder. See "Using exported files" later in this chapter for information on what gets exported to this folder. |
| Specify how often to export | Choose an option from the Export Frequency pop-up menu. If your published Contacts change frequently, select a higher frequency. |
| Select Public Categories to publish | Click Categories…. Select the Public Categories you want to publish in the Web Page Configuration dialog box that appears. Click List View Fields… and Detail View Fields… to specify which fields to display for each published Category.<br><br>*You can assign different Web page headers and/or footers for the Categories you publish. See "Changing headers and footers by Category" later in this chapter for details.* |

5. When you're finished setting up Web publishing, click OK.

   You're returned to the Public Contact Server Configuration dialog box.

6. Click OK.

   You're returned to the server status window.

## Generating HTML automatically vs. exporting HTML

Several factors may help you decide whether to let your server generate HTML automatically, or export HTML to a specific folder at regular intervals.

Generating HTML automatically means that your server Macintosh acts as a Web server—Now Up-to-Date & Contact creates all the necessary Web page files, and users access your Macintosh directly from their Web browsers. In general, this is advisable if your Macintosh is powerful enough to handle dozens of simultaneous HTML requests. If not, you may want to export.

Exporting HTML gives you access to the files that make up your Now Up-to-Date & Contact Web pages. Exporting is useful if you plan on using your Internet provider's server as your Web server, or if another, more powerful Web server machine is available in your office (a Unix server, for instance).

A final option is to generate HTML automatically and export HTML at the same time. This is useful if you want your server Macintosh to act as a Web server for a limited number of users (the employees in your company, for instance), while still being able to provide the Web page files to an external provider for wider use.

## Customizing your Web pages

Your Calendar and Contact Web pages are made up of a number of files that determine page appearance and structure. While many of the default files created by the server applications may suit your publishing needs, you may want to replace or modify others to customize your Web pages.

*If you override a default HTML or GIF file and aren't satisfied with the results, just delete the file and restart the server application. The original default file is re-created.*

## Default Web page files

When you publish Web pages for the first time, the server applications each create the following folders and files in the same folder as the server applications themselves:

| This folder… | Contains… |
|---|---|
| SysHTML | The “HomeHead.html” and “HomeFoot.html” files, which define the upper and lower portions of your Web home pages, and “CatHead.html” and “CatFoot.html”, which define the same portions of your Web Category pages. The Public Contact Server also includes “frame.html”, which defines the overall structure of all Contact Web pages. (Public Event Servers do not include a “frame.html” file.) |
| Images | All the GIF graphics files that make up the elements of your Web pages, such as Calendar month buttons and Contact alphabet buttons. |

## Exported Web page files

When you export Web page files for the first time, a “homepage.html” file that lists the Categories you’re publishing is the automatically created in your export folder. The following folders are also created in the export folder:

| This folder… | Contains… |
|---|---|
| Images | All the GIF graphics files that make up your Web page. (This is a copy of the default Images folder described above.) |
| Category folders | All the HTML files for the Events or Contacts you’re publishing.<br>! *Separate folders are created for each Category you publish. These folders are named according to their Category ID numbers.* |

Each Category folder includes the Calendar View pages (for example, “m3-1-97.html” for the March, 1997 Month View) or Contact List View pages (“CGA.html” through “CGZ.html” for the alphabetical listings). They also contain the detail pages for each published Event (for example, “d3-6-97+2.html” for the second Event on March 6, 1997) or Contact (for instance, “ID10002.html”).

! *If you want to customize your exported Web pages, be sure to customize only those files in the SysHTML and Images folders. If you customize the files in your export folder, the default files automatically overwrite your modified files during the next scheduled export.*

## Replacing Web page files

You can replace any of the Web page files in the SysHTML and Images folders to customize your Web page. For example, you might want to replace the default home page header with a GIF file containing your company name and logo.

*Replacing default files changes all Web pages on a server. To replace a header and/or footer file for a specific published Category only, see the next section, "Changing headers and footers by Category."*

Follow these guidelines when replacing Web page files:

- Replacement files must have the same filenames as the files they're replacing, including the ".html" or ".gif" extension
- All GIF files referenced in a replacement header and footer files must be placed in the Images folder
- References to GIF files in replacement header and footer files must be in this form:

  ```
  <IMG SRC="../Images/filename">
  ```

  where "filename" is the name of the GIF file (be sure to include the ".gif" filename extension if appropriate).

## Modifying Web page files

You can customize your Web pages by modifying the default header and footer files, including adding and providing links to HTML files of your own. You should have an understanding of HTML before modifying the default files; there are several useful HTML guides available on the World Wide Web to get you started.

*It's possible to modify the "frame.html" file, but we don't recommend it. If you* do *modify "frame.html" and need to return to the default file, delete the modified file from SysHTML and restart the Public Contact Server application. The original file is re-created.*

Adding links to additional HTML files in the default files allows your users to jump to other relevant Web pages. HTML files referenced in links must be in the Images folder.

References to additional HTML files in default files must be in the following form:

```
<A HREF="../Images/filename">
```

where "filename" is the name of your HTML file.

*If you're exporting HTML files for use on a different platform server, there may be filename case restrictions. You may want to use lowercase filenames to avoid problems.*

## Changing headers and footers by Category

You can specify different header and/or footer files for each Category you publish. This is useful if you don't want to replace the default header and footer files for all your Category pages.

Place your custom header and footer files in the appropriate SysHTML folder; they must include the ".html" filename extension. When you set up your server for Web publishing, enter the name of these header and footer files in the respective Category Header File and Category Footer File text boxes in the Web Page Configuration dialog box. If you leave these boxes blank, the default header and footer files are used.

See "Setting up Now Up-to-Date Web publishing" and Setting up Now Contact Web publishing" earlier in this chapter for more information on Web publishing setup.

# Chapter 6

# Server Maintenance

This chapter describes how to perform general maintenance on your Public Event and Public Contact Servers, including moving server files from one Macintosh to another and archiving public Events.

## Moving server files from one Macintosh to another

There may be times when you want to make a different Macintosh your Public Event or Public Contact Server Macintosh. This may be because a faster Macintosh has become available, for instance. The most important part of this procedure is moving the server database files to the new Macintosh, since they contains the Public Categories, Events, Contacts and Group Scheduling items you're moving.

! *When moving a Public Contact Server to another Macintosh, be sure to move its history file along with its database file.*

**To move server files to another Macintosh:**

1. Quit the server application.
2. Copy the application and the corresponding database and history files to a diskette before removing them from the old server Macintosh.

   The database filename consists of the name of the server followed by ".db", while the name of the history file consists of the name of the server followed by ".his".

   *You don't need to copy the server applications from the original server Macintosh—you can always install them from your master disc.*
3. Insert the diskette into the disk drive of the new server Macintosh, then copy the files to the new server's hard disk.
4. Verify that the database file (and, if appropriate, the history file) has the same name as the server.

If the names don't match, either copy the name of the server and paste it before the ".db" portion of the database filenames, or change the name of the server to match the database file.

5. Open the server application on the new server Macintosh.

   A progress bar appears, showing that the server application is loading the database file. This indicates that the move was successful, and that this Macintosh is now a Public Event or Public Contact Server.

# Restoring a server database file from backup

If your server database file is lost or damaged and you need to restore it from a backup, follow these steps.

### To restore a server database file:

1. Locate the database file that is to be replaced.

   The database file will be in the Now Up-to-Date or Now Contact folder. Disregard this step if the file has simply been lost or accidentally deleted.

2. Copy the backed-up database file into this location.

   If you're replacing a file of the same name, it is probably in use, so that you will have to move it to a different location (such as the Desktop) before you'll be allowed to place the new file in its location.

3. Verify that the database file has the same name (preceding the ".db" suffix) as the server application.

   If the names don't match, copy the name of the server application and paste it before the ".db" portion of the database file's name.

4. Open the Now Up-to-Date Server application.

   A progress bar appears, showing that the server application is loading the new database file. This indicates that the restoration was successful.

# Archiving data from a Public Event Server

When large numbers of users in a workgroup use Now Up-to-Date regularly to schedule Events, a Public Event Server's database file can become so large that Now Up-to-Date's network performance is affected. The best way to prevent this is to archive Event information from Public Categories. Archiving lets you remove Public Event data older than a specified number of months from the database file, and save it to a text file.

In order to archive all Public Event data and remove it from the Public Event Server database file, you must run Now Up-to-Date on the Public Event Server Macintosh. This function reduces the size of the database file and improves network performance. Even though the removed information is saved to a text file, use caution when archiving data.

# Appendix
# Tips and Troubleshooting

This appendix provides helpful usage and performance tips, as well as important information about problems you or your users may encounter when using a Public Event or Public Contact Server.

## Usage tips

When you create a Public Event Server or Public Contact Server, be sure to give it a name that readily conveys its purpose, and that won't be confused with another server. ("Product Marketing Server" is much more informative than "Bob's Server" or even the default "Public Event Server" or "Public Contact Server" when you're on a network with multiple servers running.) Clear naming of servers can help to reduce network traffic by ensuring that your users connect only to the servers that they really need information from.

If you change a server's name, be sure to quit and then re-open the server application, and to inform your users of the change.

## Server performance

The Macintosh you use as your Public Event or Public Contact Server determines how quickly your users can use the information stored on it. The following table will give you an idea of which system may best suit your server Macintosh needs. Note that the figures in the table are provided as a benchmark only; your performance results may vary, and you certainly aren't restricted to the systems listed.

| Number of users | Number of Public Events or Contacts | Sufficient system |
|---|---|---|
| 1 to 50 | Up to 1,000 | Performa 200 (or better) |
| 50 to 250 | Up to 10,000 | Quadra 630 (or better) |
| 250 to 500 | 10,000 and up | Power Macintosh 7100 (or better) |

*Be aware that when your users read Public Events or Contacts from a server into their Calendar or Contact File for the first time, the process takes substantially longer than on subsequent updates.*

# Common questions

**The server on my PowerBook disappears from the network whenever the PowerBook goes to sleep.**

This is because AppleTalk is shut down when the PowerBook goes to sleep, and you must wake up the PowerBook to re-establish the network connection. For this reason, you may wish to avoid configuring a PowerBook as a Public Event or Public Contact Server if possible.

**We moved a server to another Macintosh on the network, and now all of the server's Public Categories are gone.**

The most likely reason for this is that the database files for the servers were left behind on the old server Macintosh. See "Moving server files from one Macintosh to another" in Chapter 6, "Server Maintenance," for details on moving servers and their database files.

**The server database on our network was lost and there's no backup to restore it from!**

While this is a serious situation, it is possible that the Public data can still be recovered. Because copies of Public Events and Contacts are stored in users' Calendar and Contact Files, you may be able to export the Public data from a user's Calendar or Contact File, re-create the lost Public Categories, and import the data back into the new Public Categories. Because the servers create new, blank database files if they don't find the old ones at startup, it's important that you find a user whose Calendar or Contact File has not connected to the server since the original database was lost.

**The server on our network seems inactive at times and won't respond to update requests.**

Because the servers are applications, their functions can be interrupted if a dialog box from another application or extension is open on the screen of the server Macintosh. You should check to see if this is happening on the Macintosh, and if so, look into preventing these dialog boxes from appearing.

**What does the activity indicator in the server status window show?**

The bar showing server activity reflects the five-second average of client requests received every second. (A client request is a user modifying a Public Event or Contact, a user subscribing to a new Public Category and so on.)

**I've forgotten the log-in password for my server, what should I do?**

Contact our technical support group for assistance.

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