



Eudora Planner™ **User's Guide**

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Introduction

What Is Eudora Planner?

Eudora Planner is a schedule and contact management tool for Windows 95 and Windows NT that provides flexible portability and simple data sharing in a package that is easy to learn and quick to use.

Flexible Portability

Eudora Planner's portability features were designed for today's increasingly mobile manner of working, which includes paper and electronic organizers, laptops and digital phones. It balances the need for simple sharing in the office with the need for immediate access to contact and meeting information while away.

Eudora Planner gives you many options for "going mobile:"

- Advanced, flexible printing with customizable templates for printing to popular paper-based organizers
- Automatic laptop synchronization that lets you disconnect from the network and take your Eudora Planner data with you, then automatically synchronizes your offline changes when you return
- Hand-held organizer synchronization through IntelliSync, a third-party tool that synchronizes your Eudora Planner data with either PalmPilot or Windows CE devices
- TCP/IP Internet access for sharing calendars and address books and scheduling group events from the road or offices in other cities
- Web-based, customized calendars and address books created automatically using Eudora Planner's Web Publisher program.

High-Speed Access to Your Data—Anytime, Anywhere

Eudora Planner's exclusive QuickAccess pop-up tools put calendar and address book data at your fingertips at all times—even when Eudora Planner's not running. You can quickly look up a contact record while writing an e-mail, view today's agenda while surfing the Internet, or receive reminders of upcoming meetings—all without launching Eudora Planner.

Eudora Planner's customizable tabs make it easy to filter and retrieve groups of contacts or events, and even add a unique background image to represent the contents of each tab. You can also create a special look, or style, for each category of events and contacts you use, making it easier still to quickly get information from Eudora Planner.

Eudora Planner's integration with the Internet lets you find a street map or ZIP+4 code with a single click from any contact record. In your address book, automatic hyperlinks for e-mail addresses and URLs provide the same one-click access to your Internet-enabled contacts.

Share Schedules and Contacts on the Network

If you're part of a workgroup that uses Eudora Group Planner, you can selectively share calendars, contacts and to-do lists with others over your TCP/IP network. Group scheduling makes it easy to schedule people, rooms and resources while avoiding the scheduling conflicts that can so often occur. With support for required or optional attendance, Eudora Group Planner automatically displays a list of available meeting times and indicates potential schedule conflicts. It also automatically notifies invitees of new meetings and indicates which users have accepted or declined.

You can connect to Eudora Group Planner using a TCP/IP connection within the office or remotely with no difference in functionality. And for those on the Internet or an intranet, Eudora Planner's Web Publisher feature lets anyone with a Web browser and access privileges view shared schedules and address books.

Conventions Used in the Book

This book calls attention to certain kinds of information with the following symbols:



Used as a note to provide additional information or to ensure that you avoid problems.



Used as a tip to describe a noteworthy feature.



Used to indicate that you can find more details on a topic in online Help.



Used to indicate that you can right-click an item to see a shortcut menu that contains commands you can use on the item.

Chapter 1

Getting Started

This chapter provides an overview of the key elements and concepts of Eudora Planner.

Eudora Planner Features

The following sections provide a brief description of Eudora Planner's major features.

The Calendar

The Eudora Planner Calendar is a personal planner with which you can record and track the items that make up your schedule. These items—called *Events* in Eudora Planner—can be meetings with groups or individuals, to-dos or calls you need to complete, special dates, or long-term activities that span days or weeks, such as conventions or vacations. You can attach e-mail addresses, Web site addresses and graphics to Events, as well as the names and telephone numbers of Contacts in your Address Book. Eudora Planner's Calendar also contains a To-Do List that lets you easily view, modify, and organize your tasks and calls.

The Address Book

Use the Eudora Planner Address Book to manage information about the individuals and companies you communicate with. The records in your Address Book—called *Contacts* in Eudora Planner—hold personal information such as names, company names, home and business addresses, telephone numbers, and e-mail addresses. Your Contacts can also contain notes, links to associated Web sites, and attached documents created in other applications. The Address Book is fully integrated with your Eudora Planner Calendar, so Contacts related to Events can be linked to those Events.

Categories

You can organize your Eudora Planner information by assigning *categories* to like or related Calendar and Address Book items. You can assign one or more categories to individual Events or Contacts. For example, you could assign only one category called Family to the Contact for a relative, whereas you might assign both a Business and Personal category to the Contact for a business associate who is also a friend. If you then apply different text styles and colors to your categories, you can tell at a glance what category an Event or Contact belongs to.

If you're using Eudora Group Planner, you have the ability to create categories that are either *private* or *public*. Private categories reside only in your database and are not available to other users; public categories reside on a workgroup server and can be shared with other Eudora Group Planner users connected to that server. You can add these public categories to your Calendar and Address Book when you connect to a workgroup server. For more details about sharing Eudora Planner information, see [Chapter 7, "Using Eudora Group Planner," on page 119](#).

Tabs

Just as related Events and Contacts can belong to categories, so too can related categories be grouped together in tabs. Eudora provides Calendar tabs and Address Book tabs that let you visually associate categories that contain the same kind of information. For example, you can create a Vacation tab in your Calendar that shows Events in your private Vacation category and also those in the public Holiday category on your company's server. When you select the Vacation tab, you see all the vacation Events that apply to you. Similarly, you can create tabs in the Address Book for organizing separate categories of Contacts.

A tab can contain multiple categories, but one of those categories must be the *default* for that tab. The default category for a tab is that category automatically assigned to an Event or Contact created on that tab. You can choose a default category for each tab in your database.

You can also create a unique visual style for each of your tabs, so you always know at a glance which tab you are viewing.

Plugins

In Eudora Planner, the Calendar and Address Book are implemented as separate, distinct *plugins*. Plugins are small, specialized programs that work only within the larger applications for which they are designed. The Calendar and Address Book plugins let you work with the information stored in your Eudora Planner database. You can add other plugins to Eudora Planner as they become available. These might include applications that allow you to transfer Event and Contact data to and from a personal digital assistant, access your Eudora Planner database from a digital phone, or publish Events and Contacts on the World Wide Web or company intranet. Each plugin appears in the shortcuts bar, where you can access it with a single click.

Shortcuts

Eudora Planner's shortcuts let you access frequently-used applications, documents, and Web sites from inside the Eudora Planner window. These shortcuts let you keep your Calendar and Address Book close at hand, while you're only one click from other important applications and files on your computer.

QuickAccess

QuickAccess is a tool that provides easy access to your Calendar and Address Book information from the Windows taskbar. With QuickAccess, you can view your schedule with QuickDay, find names and phone numbers on the fly with QuickContact, and enter new Events and Contacts using QuickPad. QuickAccess also lets you launch Eudora Planner right from the taskbar.

Group Scheduling

In addition to being a personal planner, Eudora Group Planner lets you share scheduling and Contact information with other Eudora Group Planner users on a network, as well as coordinate meetings and the use of rooms and equipment with those users. For more details on how to use Eudora Group Planner, see [Chapter 7, "Using Eudora Group Planner,"](#) on page 119.

Web Publisher

Eudora Planner's Web Publisher plugin lets you publish Calendar and Address Book data for viewing on the World Wide Web or a company intranet. Other Eudora Planner users, whether part of your workgroup or not, can then drag those Events and Contacts from their web browser into their own Eudora Planner Calendar or Address Book. For information on using the Web Publisher, see [Chapter 8, "Using Web Publisher,"](#) on page 143.

Installing Eudora Planner

The following sections describe the resources and tasks required to install, register, and uninstall Eudora Planner.

System Requirements

To install and use Eudora Planner, you need

- A personal computer with a 486 or higher processor (Pentium 90 recommended).
- The Microsoft Windows 95® operating system or Windows NT® workstation operating system version 4.0 or later. For Windows NT 4.0 installations, Service Pack 3 for Microsoft Windows NT is also required.
- 16 MB of RAM for use on Windows 95 or Windows NT Workstation 4.0.
- 18 MB of hard disk space.
- A CD-ROM drive.
- A VGA or higher-resolution video adapter (SVGA 256-color with 800x600 or higher resolution recommended).
- A Microsoft Mouse or compatible pointing device.

To take advantage of all of Eudora Planner's features, you may also want to have

- A modem, for auto-dial, that is compliant with the Windows Telephony Application Programming Interface (TAPI)
- A Windows-compatible network using TCP/IP protocol for workgroup functionality
- A dial-up or full-time Internet connection
- An e-mail package compliant with Microsoft's Messaging Application Programming Interface (MAPI) standard, such as QUALCOMM's Eudora Pro

Running Setup

Eudora Planner's installation program installs all components of Eudora Planner, including the Eudora Planner program, online documentation, and other related programs.

To install Eudora Planner:

1. Insert the CD-ROM. The Eudora Planner installation program appears.
2. Click the **Install Eudora Planner 4.0** button. The installation begins.
3. Follow the instructions provided by the installer to complete the installation.

Registering Eudora Planner

Registering Eudora Planner involves entering two codes into the software:

- A *serial number* that uniquely identifies your copy of Eudora Planner
- An *activation code* that indicates you have registered your copy of Eudora Planner

Your serial number is provided on a serial number card included in your Eudora Planner package. To enter the serial number, choose **Register** from Eudora Planner's **File** menu, then enter the serial number in the appropriate field on the resulting dialog box. Users of the trial version must purchase the Eudora Planner package to obtain a serial number.



A serial number is required for obtaining technical support for Eudora Planner.

The activation code is required to disable the registration reminder dialog box that Eudora Planner periodically displays. To obtain an activation code, choose **Register** from Eudora Planner's **File** menu, then enter your personal or company information in the appropriate fields on the resulting dialog box. When you've finished entering your information, click the appropriate button to either fax the information to QUALCOMM or upload it via TCP/IP to the Eudora Web site. If you fax your registration, the activation number will be faxed back to you; if you upload it to the Eudora Web site, the activation number will be sent to you in an e-mail message.

Uninstalling Eudora Planner

To remove Eudora Planner from your computer, Select Add/Remove Programs from the Windows Control Panel.

To uninstall Eudora Planner:

1. From the Start menu, select **Settings**, then **Control Panel**.
The Windows Control Panel appears.
2. Double-click **Add/Remove Programs**.
The Add/Remove Programs Properties dialog box appears.
3. From the scrolling programs list on the Install/Uninstall tab, select **Eudora Planner**. Then, click the **Add/Remove** button.
A dialog box prompts you to verify your selection.
4. Click **Yes** to continue uninstalling.
Eudora Planner is removed from your computer.

Getting Technical Support

To accommodate the varying needs of our customers, QUALCOMM offers a number of technical support options. Registered users can take advantage of free support options as well as limited telephone support. The following sections describe these options. For more information, contact us or refer to our Web site, <http://www.qualcomm.com/eudora/planner>.

To guarantee your access to technical support, be sure to register Eudora Planner as described in “Registering Eudora Planner” on page 5.



Over time, our technical support options may change. If you are not on an active support plan, you may want to consult our Web site or Fax Document Retrieval System, as described in the following section, for any changes to the options available.

Free, Unlimited Support

QUALCOMM currently offers the following free technical support options:

- For no charge, you can call our Fax Document Retrieval System at 800-730-7860 or 503-274-6370. This system can fax you answers to common questions as well as troubleshooting guides compiled by our support technicians.
- Our World Wide Web site (<http://www.qualcomm.com/eudora/planner>) includes a large number of free technical support documents from our Document Retrieval System, viewable online.

Limited Technical Support (U.S. Only)

To determine what additional technical support may be available, registered users can either call 619-651-5450 or send e-mail that includes your serial number to one of the following addresses:

- mac-planner-support@qualcomm.com for Macintosh users
- win-planner-support@qualcomm.com for users on Windows 95 and Windows NT 4.0

Similarly, users of the demo version who want to know about the technical support options available can send e-mail to

- mac-planner-demo@qualcomm.com for Macintosh users
- win-planner-demo@qualcomm.com for users on Windows 95 and Windows NT 4.0

International Technical Support

Outside the United States, technical support is available through your local reseller.

Back Up Your Data!

Some technical support situations can be avoided, especially those involving damaged Calendar or Address Book data, by backing up your Eudora Planner data. The backup process is easy, can save you time and money, and provides a relatively simple way to recover from mistakes and problems.

The Eudora Planner Database Management Tool lets you back up, restore, and get information about your local Eudora Planner database. You should make it a habit to use this program periodically, to make backup copies of your database in case anything unfortunate should happen to it in the course of everyday usage.

For running this program, a **Backup** shortcut is available in the Eudora Planner submenu of the Windows Start menu. If for some reason this shortcut has been deleted, you can start the program by running the file **backup.exe** that is installed in the same directory as Eudora Planner.

To back up your local database, first exit from Eudora Planner. Then, run the **backup.exe** program and click the **Backup** button. A directory dialog box appears which you can use to choose a file name and location for the backup database file. For maximum protection, you should place this file in a directory other than the one where the Eudora Planner program and your active database reside. A Backup directory is created at installation time under the Eudora Planner directory for this purpose.

Restoring a backed up database is done similarly to the backup. Run the backup program, then click the **Restore** button. A directory dialog box appears which you can use to choose the backup database file.

If Eudora Planner is running when you initiate the backup or restore process, then after you specify a name and location for the backup file and click **OK**, a dialog box informs you that Eudora Planner must be closed while the backup/restore proceeds. At this point, you can click **Yes** to close Eudora Planner and continue or **No** to cancel the process until you are prepared to close Eudora Planner.

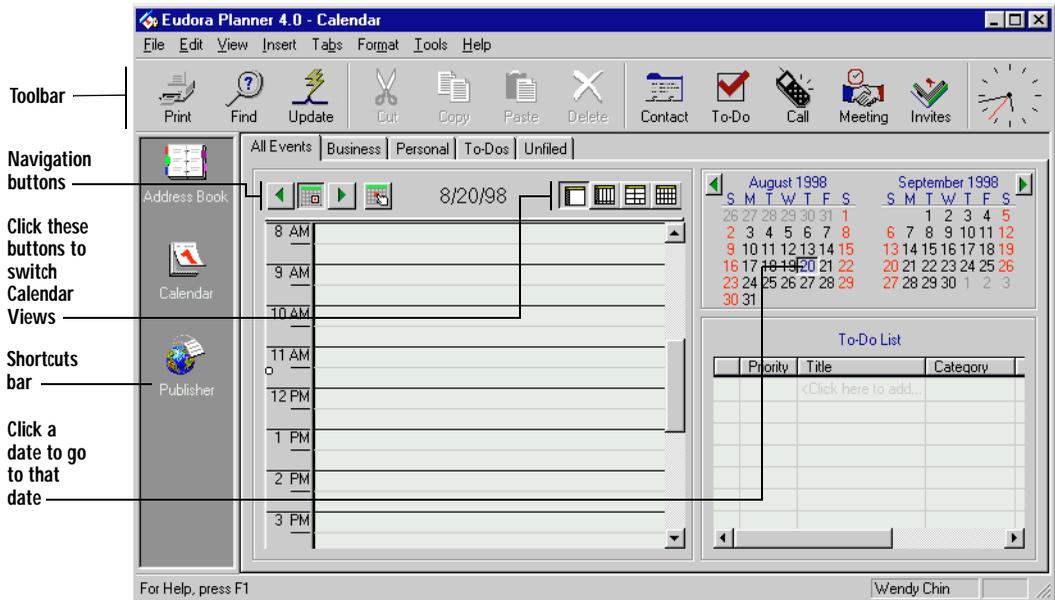
Starting Eudora Planner

You can start using Eudora Planner immediately after you've installed it.

To start Eudora Planner:

1. From the **Start** menu, select **Programs**, then select **QUALCOMM** from the submenu that appears.
2. From the **QUALCOMM** submenu, select **Eudora Planner**.
3. The **Eudora Planner** window appears, showing the last plugin application that was displayed when you last closed Eudora Planner.

The first time you start Eudora Planner, it displays the Calendar.

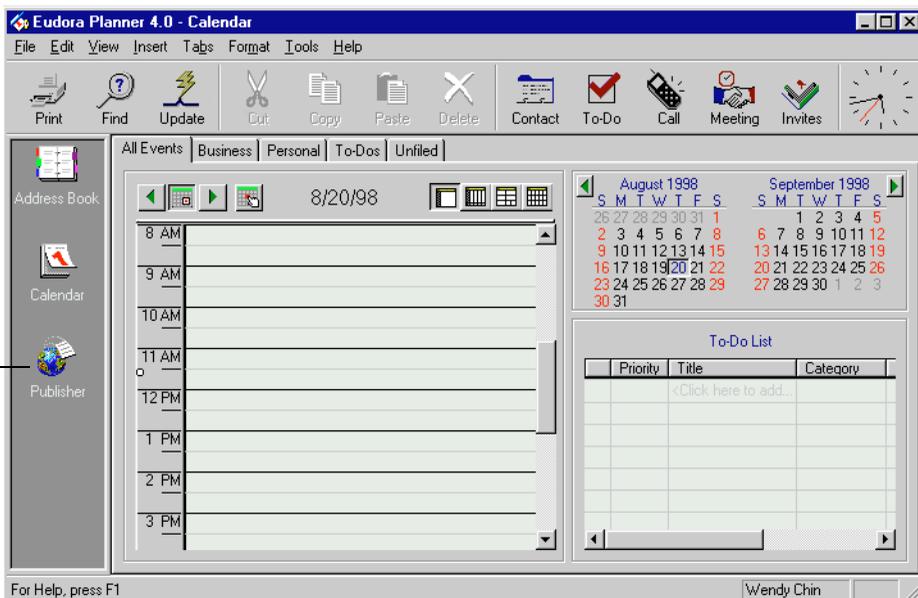


The Eudora Planner Window

The Eudora Planner plugins, toolbar and shortcuts bar are all components of the Eudora Planner application window. You can alter the appearance and arrangement of this window to suit the way you work.

The toolbar gives you one-click access to common tasks

Shortcuts give you one-click switching to other plugins and applications



Using the Toolbar

Eudora Planner's Toolbar is conveniently located at the top of the Eudora Planner window and can perform the same operations as some of the most frequently-used menu commands, putting tasks like printing, finding, copying, pasting, and creating new Events and Contacts within easy reach.



Using Shortcuts

Click the icons in the shortcuts bar to move among the Calendar, Address Book and other Eudora Planner plugins. You can also use this area to add shortcuts to other applications, as well as add links to important documents and Web sites you view frequently. Click and drag the shortcuts bar to move it to another location in the Eudora Planner window. For information about shortcuts, see ["Adding Shortcuts" on page 97](#).



Navigating in Eudora Planner

Eudora Planner provides four different ways to view your Calendar and two ways to view your Address Book.

Calendar Views

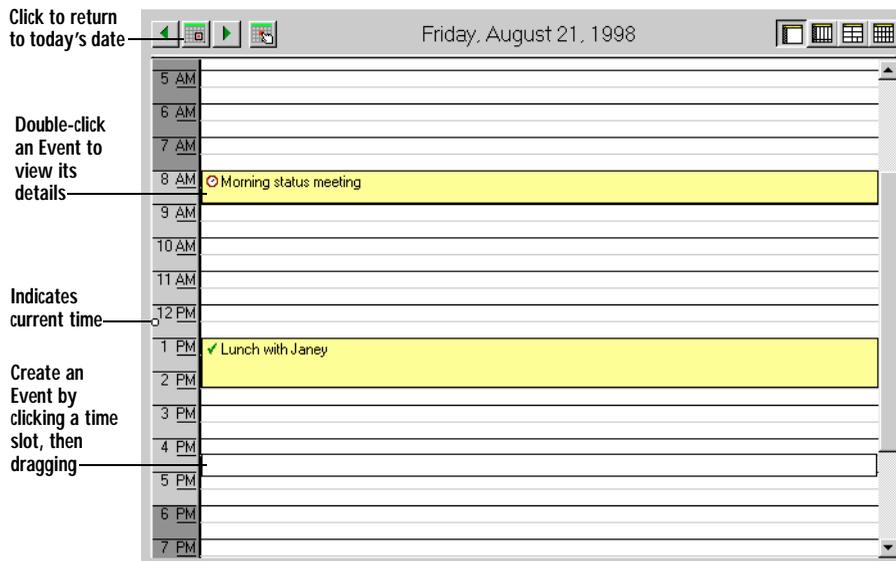
Eudora Planner can display your Event information in four different Calendar Views. Each View—Day, Multi-Day, Week, and Month—shows a different range of dates and level of detail. The following sections describe the Calendar Views and their important features.

Day View



The Day View displays a timeline of Events scheduled for a specific day. Events appear on a grid divided into specific time increments—five minutes to a half-hour, depending on your preferences. You can change the time increments by right-clicking anywhere on the Calendar and selecting **Time Increment** from the pop-up menu that appears, then choosing a time increment from the Time Increment submenu.

Click the left and right arrows to move backward and forward through the Calendar one day at a time. The light-shaded area indicates the range of time in which you're available for meetings (such as your workday); the dark-shaded area indicates when you're unavailable.



Multi-Day View



The Multi-Day View shows a daily timeline of Events scheduled for a one-week period. The cells in the Multi-Day grid can represent time increments from five minutes to one-half hour, depending on your preferences. You can change the time increments by right-clicking anywhere on the Calendar and selecting **Time Increment** from the pop-up menu that appears, then choosing from the Time Increment submenu.

Meeting Events and Calls with a specific time appear right on the grid, whereas holidays and special all-day Events like birthdays and anniversaries appear above the grid; dated To-Dos and Calls appear in the boxes below the grid, underneath the date for which they are scheduled. Click the left and right arrows to move backward and forward one week at a time through the Calendar. To have the arrows move you through the Multi-Day View one day at a time, right-click anywhere on the view, then select **Scrolling View** from the shortcut menu that appears.

Use the navigation buttons to scroll through the Calendar

Banners, Special Events, and Holidays appear above grid

Indicates current time

Meetings and dated Calls appear in grid

Dated To-Dos and Calls appear beneath grid

Create an Event by clicking at the start time, then dragging to the end time

| | Sun 16 | Mon 17 | Tue 18 | Wed 19 | Thu 20 | Fri 21 | Sat 22 |
|-------|--------|--------|------------------------------|--------|---|--------|-------------|
| 11 AM | | | | | | | |
| 12 PM | | | | | | | |
| 1 PM | | | | | | | ★ Birthday |
| 2 PM | | | | | ✓ Lunch with Janey | | |
| 3 PM | | | ○ Marketing group checkpoint | | | | |
| 4 PM | | | | | | | |
| 5 PM | | | | | | | ✎ Call Herb |
| 6 PM | | | | | | | |
| 7 PM | | | | | | | |
| | Title | Title | Title | Title | Title | Title | Title |
| | | | | | <input type="checkbox"/> Finish estimates | | ✎ Call Herb |

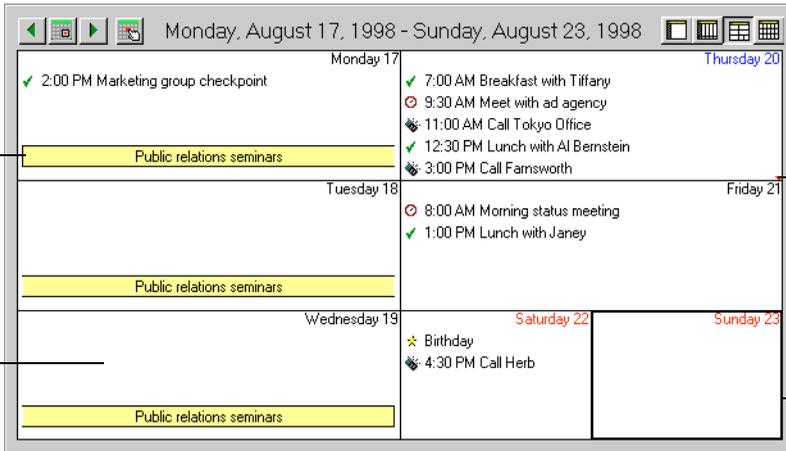
Week View



The Week View lists the Events scheduled for each day of a particular week. A day cell in the Week View shows holidays, special all-day Events, meetings, and calls for which you've set a specific time. Meetings and calls appear with their times next to them. Click the left and right arrows to move backward and forward one week at a time through the Calendar.

Banners appear at the bottom of a day cell

To create a new Event, click in a day cell, then type



Click the arrow to scroll through a day's Events

Selected date is outlined

Month View



The Month View shows Events scheduled for an entire month. To create an Event, click anywhere in a day's block to select that day, then start typing. You can scroll down through a day's Events to see that day's schedule. Click the left and right arrows to move backward and forward one month at a time through the Calendar.

The screenshot shows a calendar for August 1998. The days of the week are listed at the top: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. The dates are arranged in a grid. Events are listed in the cells: '1:30 PM Call Emily Hanson' on Monday (27), '10:30 AM Masterson Presentation' on Wednesday (29), '8:00 AM Morning status meeting' on Friday (31), 'Public relations seminars' on Tuesday (28), '2:00 PM Marketing group' on Monday (17), '7:00 AM Breakfast with Tiffany' on Thursday (20), '8:00 AM Morning status meeting' on Friday (21), '1:00 PM Lunch with Janey' on Saturday (22), and '4:00 PM One-on-one with Tom' on Wednesday (26). A 'Birthday' event is also visible on Saturday (22). A yellow bar labeled 'Vacation' spans from Sunday (30) to Saturday (5). Annotations with arrows point to specific features: 'To create an Event, click in a day cell, then type' points to the Monday (27) cell; 'Double-click in the day cell to switch to the Day View' points to the Saturday (1) cell; and 'Click arrow to scroll through a day's Events' points to the right arrow on the Saturday (22) cell.

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|-------------------------------------|---------|--|--|--|---|
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 1:30 PM Call Emily Hanson | 4 | 5 10:30 AM Masterson Presentation | 6 | 7 8:00 AM Morning status meeting | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| | Public relations seminars | | | | | |
| 16 | 17 2:00 PM Marketing group | 18 | 19 | 20 7:00 AM Breakfast with Tiffany | 21 8:00 AM Morning status meeting | 22 Birthday 1:00 PM Lunch with Janey |
| 23 | 24 | 25 | 26 4:00 PM One-on-one with Tom | 27 | 28 | 29 |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |
| | Vacation | | | | | |

To-Do List

The To-Do List appears to the right of the Calendar in all Calendar views and displays the status, priority, title, category, and completion date of your To-Dos and Calls, as well as the start and due dates, if applicable. Click a column header to sort the list by the information contained in that column. You can choose which To-Dos and Calls display in the To-Do List by right-clicking above the list or in any empty cell in the list, then selecting **To-Do and Call Filter** from the pop-up menu that appears. Use the To-Do List to view and organize your Calls and To-Dos and to check them off as you complete them.

Right-click in this area to choose which To-Dos and Calls appear in the list

Click to check off completed To-Dos and Calls

Double-click an Event to view its details

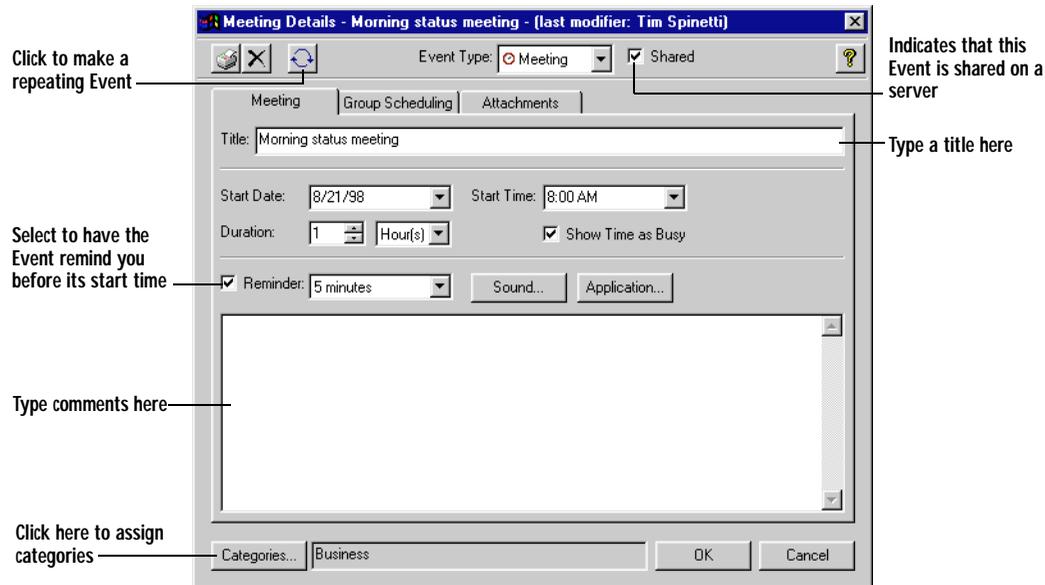
| To-Do List | | | | | | |
|-------------------------------------|----------|---------------------------------|----------|---------|---------|----------|
| | Priority | Title | Category | Due | Start | Complete |
| <input type="checkbox"/> | High | Sammy's soccer game | Family | 8/23/98 | 8/23/98 | |
| <input checked="" type="checkbox"/> | High | Teleconference w/ Tokyo office | Business | | 8/24/98 | |
| <input checked="" type="checkbox"/> | High | Call Amanda Hunter | Clients | | | |
| <input type="checkbox"/> | Normal | Call Herb | Unfiled | | 8/22/98 | |
| <input type="checkbox"/> | Normal | Drop off proofs | Business | 8/31/98 | 8/24/98 | |
| <input checked="" type="checkbox"/> | Normal | Call Ron Bernstein | Friends | | | |
| <input type="checkbox"/> | Low | Pick up diy cleaning | Personal | | | |
| <input checked="" type="checkbox"/> | Normal | November forecast | Business | | | 8/21/98 |
| | | <Click here to add a new To-Do> | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Click a column header to sort by the data contained in that column

Click in the empty cell to create a new To-Do

Event Detail

Double-click an Event to open its Event Details dialog box, where you can set and change the Event's properties.



Address Book Views

Eudora Planner lets you see and manipulate your Contact information in two different Address Book views—the List View and Detail View. Both views are discussed in the following sections.

List View

This view shows multiple Contacts in an organized list that you can sort and compare according to your preferences. You can choose which fields display in the List View columns by changing settings for the tab (for details, see “[Creating Address Book Tabs](#)” on page 91). To reorder a column in the List View, click its heading and drag right or left to the desired location. You can type directly into the List View after clicking the cell where you want to enter information.

The screenshot shows a table of contacts with the following columns: First Name, Last Name, Company, Work Phone, and Email. A 'New' button is located in the top-left corner of the table area. The contact 'Ernest Mann' is selected, highlighted in blue. Annotations on the left side of the image point to various parts of the interface:

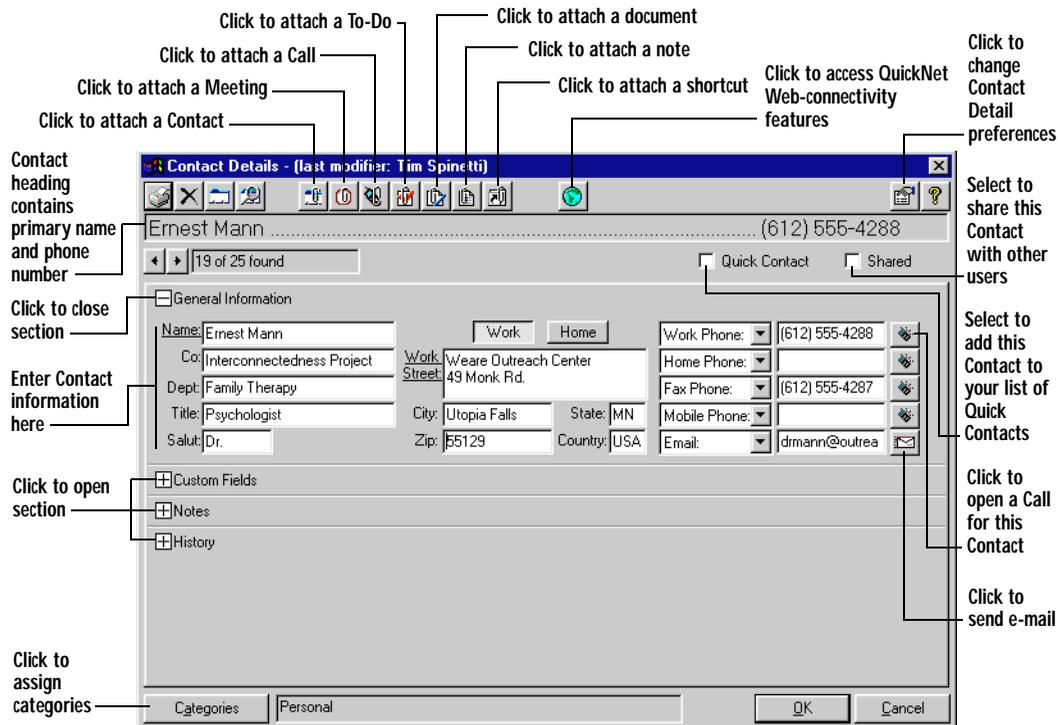
- Click column header to sort by its contents**: Points to the 'Last Name' column header.
- Click to create a new Contact**: Points to the 'New' button.
- Double-click a Contact to view its details**: Points to the contact row for 'Ernest Mann'.
- Right-click a Contact to attach an Event to it**: Points to the right side of the contact row for 'Ernest Mann'.
- Indicates number of Contacts in tab and which Contact is selected**: Points to the '1' in the 'Last Name' header and the blue highlight on the 'Ernest Mann' row.

| | First Name | Last Name | Company | Work Phone | Email |
|-----|--------------|-------------|-------------------------------|----------------|-----------------------|
| New | | | | | |
| | | | Online Nation | (800) 555-6335 | |
| | Rhonda | Ayuda | Braeburn Computing | (800) 555-4357 | help@braeburn.com |
| | Moira | Better | Better Bolt Co. | (218) 555-4522 | moira@bbolt.com |
| | Michael | Blankenhope | Roots and Branches, Inc. | (503) 555-9411 | mblank@randb.znet.net |
| | Neil | Bohrer | Bohrer Tunnelling | (518) 555-8456 | |
| | Lisa | Bolton | Mid-American Tools | (309) 555-3127 | |
| | Ed | Bucker | Hawthorne Bridge Co. | (503) 555-6832 | bucky@hbc.com |
| | Ona | Clickman | Plugged Peripherals | (617) 555-7237 | onaclick@plugged.com |
| | Calvin | Cling | United Fastener Co. | (212) 555-3895 | |
| | Janet | Dempsey | Middleman And Co. | (406) 555-7655 | |
| | Seymour | Emil | Church Of Rising Expectations | (318) 555-2334 | emil@rising.org |
| | Ramsay | Fisher | Ticker Trackers, Inc. | (919) 555-9823 | fisher@ticktrack.com |
| | Yuri | Gorsky | Yuri's Screws, Inc. | (802) 555-3452 | |
| | Jean-Michael | Gris | West Coast Lubricants | (206) 555-7251 | |
| | Chester | Holmes | HR Solutions | (701) 555-7265 | |
| | Stanislaus | Karetsky | Catawba College | (518) 555-7477 | stank@catawba.edu |
| | Casey | Lichenstein | Universal Cellular | (415) 555-5584 | |
| | Inga | Linke | Forlane University | (601) 555-4839 | ilinke@forlane.edu |
| | Ernest | Mann | Interconnectedness Project | (612) 555-4288 | dmann@outreach.org |
| | Kali | Noir | Gunther Cable Systems | (815) 555-9834 | |
| | Brian | Pressman | The New London Times | (603) 555-8777 | |
| | Segundo | Ringo | Conglomerated Telecom | (503) 555-2101 | |
| | Julius | Salvia | Salvia Wiring | (503) 555-5849 | |
| | Tyrell | Strom | Percy, Andrewes, and Walker | (612) 555-6930 | strom@pawlaw.com |
| | John | Vaskitz | Radical Restorations, Inc. | (970) 555-9439 | |

Contact 19 of 25 Tim Spinetti

Detail View

The Detail View shows a single Contact with all associated information and attachments.



The arrow buttons under the Contact heading let you scroll through your Contacts one-by-one in the order in which they're currently sorted in the List View. The box next to the arrow buttons indicates the number of Contacts appearing in the list and the numerical position of the opened Contact in that list.

The General Information, Custom Fields, Notes, and History sections expand and collapse, so you can conceal from view those sections you're not using.

Drag most frequently-used custom fields from the lower area to the upper area

Type here to create a note

Choose which items display in the History list

Custom Fields

| | | | |
|-------------|---------|----------------|-------------------------------------|
| Anniversary | 6/11/98 | Spouse | Anne |
| Birthdate | 10/8/98 | Birthdate Card | <input checked="" type="checkbox"/> |
| Hourly Rate | 75 | | |
| Custom 3 | | Custom 7 | |
| Custom 4 | | Custom 8 | |
| Custom 5 | | SSN | |

Drag custom fields you use most often from the lower pane to the upper pane. Edit custom fields...

Notes

History

Display: To-Dos Calls Notes Documents Meetings Contacts Other

| Type | Title | Date | Last Modified |
|---------|-----------------------|------------|---------------|
| Meeting | Consultaion | 08/24/1998 | 09:01 PM |
| Note | Dr. Mann's Evaluation | 08/24/1998 | 09:01 PM |

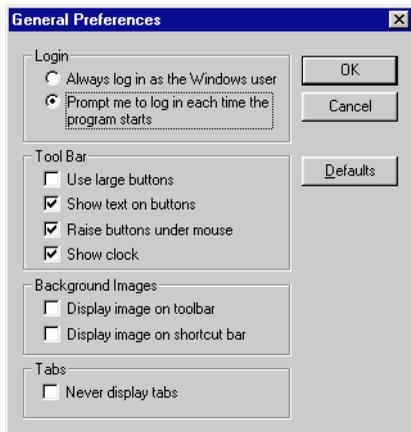
Yes/No custom field

Type directly into custom field to enter data

Click to add note to the History list

Setting Eudora Planner's General Preferences

Eudora Planner stores your login and display settings in its General Preferences. To set or change these preferences, from the **Tools** menu, select **General Preferences**. The General Preferences dialog box appears.



The **Login** options determine whether Eudora Planner prompts you to log in each time you start the program or bypasses the login dialog box and automatically logs in to your Eudora Planner database using your Windows user name. You should set Eudora Planner to prompt you to log in if you want to protect your database with a password.

The **Toolbar** settings let you change the appearance of items on the Eudora Planner toolbar. You can determine the size of the toolbar icons, the appearance of labels on the icons, and whether or not the icons appear raised when you drag the pointer across them. You can also choose to display or hide the toolbar clock.

Use the **Background Images** options to display or hide the images appearing on the toolbar and shortcuts bar.

The **Tabs** option lets you hide the Calendar and Address Book tab headings, so they don't appear in any view. If you do choose to hide your tabs with this option, you can still select each tab from the Tabs menu.

Chapter 2

Using the Calendar

The individual items you've scheduled in your calendar are called *Events* in Eudora Planner. The seven distinct types of Events available give you the flexibility to record any kind of commitment—whether it requires minutes or days of your time, whether it's crucial, optional, or can wait until later.

In this chapter, you'll learn how to create Events and add related information to them. Then, you'll learn how to use your Calendar and To-Do List to manage your schedule.

Types of Events

Events are the building blocks of your Calendar. The seven types of Events available in Eudora Planner let you track all the activities and information that fill your week: meetings and appointments, telephone calls, checklist items, special days or blocks of days, notes and reminders.

By appropriately using the available Event types, you can maintain a schedule that is effective for you and understandable to others. The following table describes the different Events you can add to your Calendar.

| Event Type | Use for... |
|---|--|
|  Meeting | A meeting or appointment, with specific start and end times on the same day, that can involve Contacts from your Address Book or, in a workgroup setting, other Eudora Group Planner users. In the Calendar, Events that you are attending appear with a check mark. |
|  To-Do | A task you need to remember to do, and to which you can possibly assign a priority. |
|  Call | A phone call you need to make. Calls are like To-Do Events in that you can assign a priority to them and track them on the To-Do List. |

| Event Type | Use for... |
|---|--|
|  Special | An Event that spans an entire day, rather than a range of time on that day. You can use Special Events for birthdays, anniversaries, journal entries or other Events on specific days. |
|  Holiday | A holiday such as New Year's Day. |
|  Sticky Note | A way to place attention-getting messages or reminders on the calendar with an electronic note. |
|  Banner | An Event that takes place over one or more days, like a vacation or convention. |

Each of these Events can be viewed and modified in its own specific Details dialog box. Double-clicking a Holiday Event, for example, produces a Holiday Details dialog box in which you can view, modify or add information about the Event. These dialog boxes are generally referred to in this book as the Event Details dialog box.

Adding Events to the Calendar

Eudora Planner gives you many ways to add Events to your Calendar. For example, you can:

- Select an Event type from the Insert menu, then fill in the date, time, and any other information in the resulting Event Details dialog box or Meeting Wizard, which guides you through the process of creating a Meeting Event.
- Click an icon in Eudora Planner's toolbar to create a new To-Do, Call, or Meeting in either the Calendar or Address Book.
- Click an empty area of any day in any Calendar View. Eudora Planner creates a new, untitled Meeting Event with a blinking cursor in it to prompt you to type a title. After typing the title, you can double-click this new Event to modify it further.

There are several other ways to create Events. In the Day or Multi-Day View, you can drag the pointer from the Event's starting time to its ending time. A new Meeting Event appears on the Calendar and the Meeting Details dialog box appears, so that you can add necessary information.

For an activity that recurs irregularly throughout your schedule, you can create an Event based on a template you've configured to contain certain, minimum information, such as a title, start time, or a list of invitees. For information on Event templates, see ["Using Event Templates" on page 48](#).

To create an Event in the To-Do List, click in the first empty cell below your list of To-Dos and Calls. A cursor appears in the cell, allowing you to type in the title of a new To-Do, which you can double-click to open and modify further.

You can also create an Event from a Contact by selecting an Event type from the button bar. The Event you create is both saved to the Calendar and attached to the opened Contact. For details, see ["Attaching New Events to Contacts" on page 61](#).

Use any QuickAccess component to create an Event without having to open Eudora Planner. The Events are immediately saved to the Calendar. For more information on creating Events with QuickAccess, see [“Creating Events in QuickDay” on page 111](#), [“Creating Events with QuickContact” on page 115](#), and [“Using QuickPad” on page 115](#).

The information needed to create an Event varies according to the Event’s type. The following sections describe in detail how to create each type of Event. These sections discuss the different types of Events in three groups:

- Meetings
- Calls and To-Dos
- Other Events

Additionally, you can organize your Events by assigning them to Event categories. To learn more about organizing Events with categories, see [“Assigning Categories to Contacts and Events” on page 85](#).

Using Meeting Events

Meeting Events are the default Event type in Eudora Planner—the type created whenever you click or drag in the Calendar to add a new Event.

Eudora Planner provides a Meeting Wizard to step you through the process of creating a Meeting Event. By default, this wizard appears when you choose the Meeting command from the Insert menu. If you don’t want to use the Wizard, you can create new meetings by dragging in the Day or Multi-Day View, which opens a Meeting Details dialog box in which you type meeting information. You can also disable the Meeting Wizard, so that the Meeting Details dialog box appears when you choose the Meeting command from the Insert menu. See [“Setting Calendar Preferences” on page 52](#) for more information.

Using the Meeting Wizard

Eudora Planner provides a Meeting Wizard that walks you through each step of creating a Meeting for group scheduling. To open the Meeting Wizard, select **Meeting** from the **Insert** menu. Follow the Wizard as it guides you through the steps of creating a Meeting.



For the Meeting Wizard to appear when you select Meeting from the Insert menu, the Use Meeting Wizard check box in the Calendar Preferences dialog box must be selected.



You cannot use the Meeting Wizard to modify an existing Meeting Event. To modify an existing Meeting, double-click it and use the Meeting Details dialog box.

Using the Meeting Details Dialog Box

You can view, add, and modify information about Meeting Events in the Meeting Details dialog box, which organizes information on its Meeting, Group Scheduling, and Attachments tabs.

| Tab | Meeting Details |
|------------------|---|
| Meeting | Shows title of the meeting, time, duration, reminder settings, and comments. For setting up meetings outside your workgroup or appointments for yourself, this is the only information you'll need to supply. |
| Group Scheduling | Shows schedule information for people and resources needed at the meeting. Use this tab to schedule a meeting that fits in best with others' schedules. |
| Attachments | Shows attached files, e-mail addresses, URLs, graphics, etc. Use this tab to make Event-related information available to invitees. |

The following sections describe how to create and modify a Meeting by adding information to the Meeting, Group Scheduling, and Attachments tabs explained in the preceding chart.

Scheduling a Meeting

In any Calendar view you can create new meetings with the Meeting Details dialog box.

To schedule a meeting using the Meeting Details dialog box:



1. Open the Meeting Details dialog box. You can do this in a variety of ways, depending on the Calendar View you're using:
 - To schedule a new meeting in the Day or Multi-Day View, drag the pointer to indicate a range of time for the meeting.
 - To schedule a meeting in the Week or Month View, click on the appropriate date to make the cursor appear in that day's block, type a title, then double-click on the meeting to open its Details dialog box.
 - To schedule a meeting using QuickDay or QuickContact, click the **New Meeting** button. To schedule a meeting with QuickPad, select **New Meeting** from the pop-up menu.
 - To reschedule an existing meeting, double-click the Meeting Event in any view.

The Meeting Details dialog box appears. The Event Type box indicates a Meeting Event.

Header contains title of Meeting and name of last person to modify it

Enter title here

Select a start date from the drop-down list or type a date directly into the box

Type notes here

Click to assign categories

Select a start time from the drop-down list or type a time directly into the box

Select to block time in your schedule



You can create a Meeting by right-clicking the Calendar, then selecting **New** from the pop-up menu. From the submenu that appears, select **Meeting**.

2. Type or change the title for the Meeting in the **Title** box.

3. If necessary, change the date and the start time for the Meeting in the **Start Date** and **Start Time** boxes.
 - To select a date, click the arrow in the **Start Date** box. A month-view calendar appears, from which you can select a date. If you need to select a different month, click the arrow buttons or type a date into the box. You can also type a date into the box using the *mm/dd/yy* format.
 - To select a time in half-hour increments, click the arrow in the **Start Time** box, then click a time in the list that appears. To choose any other time, select the time value in the box and type the time you want. You can also type a time into the box.
4. If necessary, change the duration of the meeting with the **Duration** boxes.
5. If necessary, assign additional categories to the meeting by clicking **Categories**.

The Assign Categories dialog box appears.



*In order for invitees to see your meeting on their Calendars, you must assign it to a public category that both you and the invitees subscribe to. If you're creating the meeting on a tab for which the default category is private, you can assign a public category to the meeting by selecting the **Shared** option before clicking the **Categories** button. Invitees can also see meetings to which they've been invited by creating a Calendar tab that shows Events that occupy their time. For details, see ["Creating Calendar Tabs"](#) on page 89.*

6. If you want to be reminded of this Meeting, set a reminder (see ["Using Reminders"](#) on page 38 for more information on reminders). If this is a recurring Meeting, you may want to set it up as a repeating Event (see ["Setting Up Repeating Events"](#) on page 37 for more information). If you are using Eudora Group Planner, select the **Show Time as Busy** option to have the meeting block time in your schedule (see ["Using To-Dos and Calls"](#) for more information).



*If you've turned on the **Remind me for all time commitments** option in the Calendar Preferences dialog box, then you will automatically receive a reminder for this Event if you've selected **Show Time as Busy**. For information on Calendar Preferences, see ["Setting Calendar Preferences"](#) on page 52.*

7. Click **OK**.

The Meeting appears in your Calendar as you specified.

If you are using Eudora Planner for group scheduling and want to invite users to this meeting, see ["Using Group Scheduling"](#) on page 129 for more information.

Using To-Dos and Calls

To-Dos and Calls are similar Event types that indicate specific tasks you need to complete. You might create a To-Do to show that you need to prepare a budget report or pick up a package, or schedule a Call for when you need to telephone a business client or a friend. You can mark both To-Dos and Calls as complete or incomplete to indicate their status, and you can also prioritize them, so you can tell at a glance which are most important.

To-Dos and Calls can be either undated or dated, depending on the nature and urgency of the activity you're scheduling. An undated To-Do Event does not have specific start and due dates. You could create an undated To-Do for a household project that doesn't need to be started or completed by a particular date. Similarly, an undated Call Event has neither a specified time or date. You might create an undated Call to show that you need to telephone an old friend with whom you periodically keep in touch.

Dated To-Dos and Calls have specific start dates, and, in the case of Calls, may even have specific times. To-Dos related to projects at work would likely be dated, as would Calls scheduled for potential customers or clients.

Undated To-Dos and Calls automatically forward from day to day, until you mark them as Complete. Dated To-Dos and Calls also forward from day to day, but only during the range of days between their start and due dates. These dated Events do not forward beyond their due date, but can be viewed as *overdue* Events in the To-Do List. For information on how to view overdue Events in the To-Do List, see [“Viewing To-Dos and Calls” on page 31](#).

Scheduling To-Dos

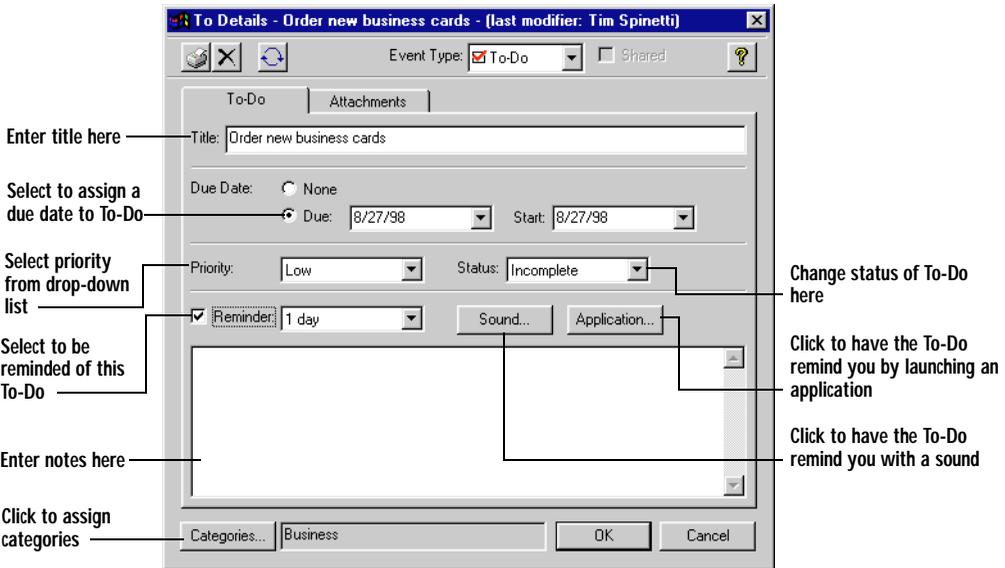
Schedule a To-Do Event to indicate a task you must complete, whether it's an important project for your department or a routine chore like taking your bottles and cans to the recycler.

To schedule a To-Do:



1. From the **Insert** menu, select **To-Do**.

The To-Do Details dialog box appears. The Event Type box indicates a To-Do.



You can create a To-Do by right-clicking anywhere on the To-Do List, then selecting **New To-Do** from the shortcut menu.

2. In the **Title** box, type a name for the To-Do.
3. If you want this to be a dated To-Do, select a due date and start date.
To do this, select the **Due** option, then click the arrow in the **Due** or **Start** box. A month-view calendar appears, from which you can select a date. If you need to select a different month, click the arrow buttons.
4. To set the To-Do's priority, click the arrow in the **Priority** box, then select from the drop-down list.
5. Click the **Categories** button to select the categories you want to associate with the To-Do.
6. Click **OK**.

The To-Do appears in the To-Do List.

Scheduling Calls

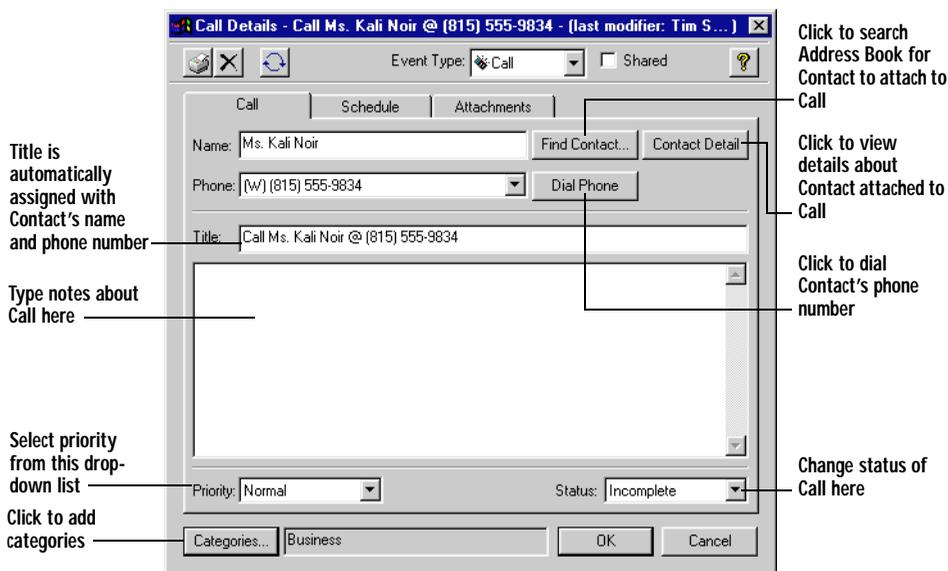
Use Call Events to schedule telephone calls, such as those to a client or potential sales prospect. You can link Call Events to Contacts in your Address Book, so that each time you telephone someone in your Address Book, Eudora Planner records a Call in that Contact's history, giving you a running log of your communications with that person or organization.

To create a Call:



1. From the **Insert** menu, select **Call**.

The Call Details dialog box appears. The Event Type box indicates a Call.

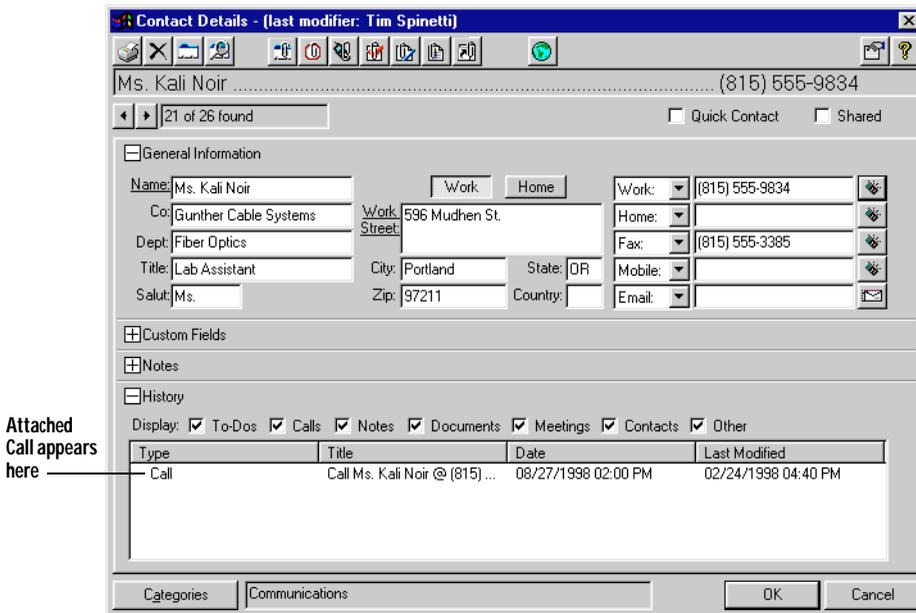


*You can create a Call by right-clicking anywhere on the To-Do List, then selecting **New Call** from the shortcut menu that appears.*

2. If you want to attach a Contact to the Call, type a name in the **Name** box. If not, go to step 3.
Once you begin to type, Eudora Planner will search the Address Book and automatically fill the Name box with the Contact's name. The Contact's primary phone number will appear in the Phone box.
3. In the **Title** box, type a name for the Call.
If you've attached a Contact to this Call, then Eudora Planner automatically gives it a title that includes the Contact's name and primary phone number.
4. Click the **Schedule** tab.

5. If you want to change the date, time, or duration, or add a reminder for this Call, select **Date**. The Date, Time, Duration and Reminder boxes become available.
 - To change the date of the Call, click the arrow in the **Date** box. A month-view calendar appears, from which you can select a date. If you need to select a different month, click the arrow buttons.
 - To select a time for the call in half-hour increments, click the arrow in the **Time** box, then click a time in the drop-down list. To choose any other time, select the time value in the box and type the time you want.
 - Change the length of the Call with the **Duration** boxes.
6. If you want to be reminded to make this Call, set a reminder. See [“Using Reminders” on page 38](#) for more information on reminders. If you are using Eudora Group Planner and you want this Call to block your scheduled time, then select **Show time as busy**.
7. Click **OK**.

The Call is appears in the To-Do List. If you’ve linked the Call to a Contact in your Address Book, then the Call will appear in that Contact’s History.



Tracking To-Dos and Calls

Use the To-Do List to view, prioritize, and mark as complete your To-Dos and Calls.

Viewing To-Dos and Calls

You can determine which Events are displayed in the To-Do List by right-clicking above the list, then selecting **To-Do and Call Filter** from the popup menu that appears. A submenu appears, containing the following options:

- Select **Undated** if you want to show your undated To-Dos and Calls.
- Choose from among the **Today's**, **Next 7 Days'**, **All Dated**, and **Overdue** options to determine which of your dated To-Dos and Calls display in the To-Do List. Select **Today's** if you want to show just those To-Dos and Calls assigned to today; likewise, select **Next 7 Days'** if you want to display only items assigned to dates in the following week. If you select the **All Dated** option, then all your dated To-Dos and Calls will appear in the To-Do List, regardless of assigned date. To see all dated To-Dos and Calls that you haven't completed by their due date, select **Overdue**.
- Select **Completed** if you want to show all the To-Dos and Calls that you've already completed, no matter how long ago their completion dates.

The To-Do List appears in each Calendar view and gives you a convenient way to log and track your To-Dos and Calls.

Dated To-Dos and Calls also appear in the Multi-Day View's To-Do area, underneath the date for which they are scheduled.

The screenshot shows a calendar interface with a multi-day view. The top bar indicates the date range from Sunday, August 16, 1998, to Saturday, August 22, 1998. The calendar grid shows events for each day, including 'Public relations seminars' on Sunday, 'Marketing group checkpoint' on Monday, 'Lunch with Al' on Tuesday, 'Lunch with Janey' on Wednesday, and 'Call Ms. Kali Noir @ (815) 555-9834' on Thursday. A To-Do List is located at the bottom of the window, listing tasks such as 'Pick up dry cleaning', 'Call Ms. Kali Noir @ (815) 555-9834', and 'Recycle day'. A callout box points to the To-Do List with the text 'To-Dos and Calls appear here'.

Tracking Priority and Completion of To-Dos and Calls

You can prioritize and sort your To-Dos and Calls by assigning them priority labels. Priority labels determine the order in which To-Dos and Calls appear in the To-Do List, quickly showing you which items are the most urgent.

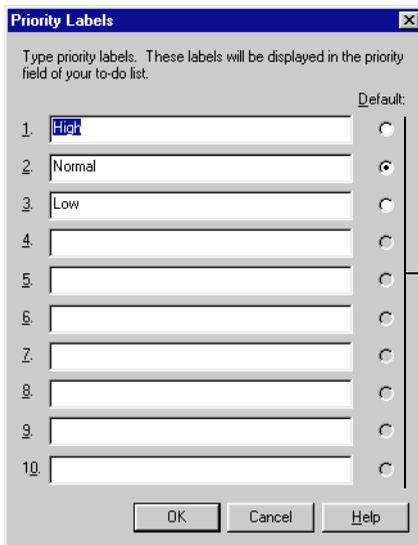
When you create To-Dos or Calls, they are by default labelled as incomplete. You can mark your To-Dos and Calls as complete once you've finished them.

When you prioritize your To-Dos and Calls, you can use the labels supplied with Eudora Planner or create your own.

To create a Priority Label:

1. From the **Tools** menu, select **Calendar Preferences**.
2. In the Calendar Preferences dialog box, click **Priority Labels**.

The Define Priority Labels dialog box appears. You can create up to ten labels. The order in which you enter the labels here determine the order in which they sort in the To-Do List.



Position in the list determines priority, regardless of label name

3. Type label names in the fields, then click the **Default** option to assign a default priority label.

When you create a new Event, it uses the default label.

4. Click **OK**.

The labels you've created are now available for assigning priority to your Events.

You can prioritize Calls and To-Dos using Eudora Planner's predefined priority labels, or you can assign labels you've created.

To assign priority to a To-Do or Call:

1. Double-click the Event to which you want to assign a priority label.

The Event Details dialog box appears.



*You can open a To-Do or Call by right-clicking it, then selecting **Details** from the shortcut menu that appears.*

2. On the **To-Do** or **Call** tab, click the **Priority** arrow to select a priority label.
3. Click **OK**.

The Priority level appears in the Priority column of the To-Do List. If you sort the To-Do List by priority, the Priority you assign here determines the Event's position on the To-Do List.

To-Dos and Calls forward daily until you complete them. Once you've completed a To-Do or Call, you can indicate that it's complete.

To mark a To-Do or Call as complete:

1. Double-click the Event that you want to mark as complete.

The Event Details dialog box appears.

2. To mark a To-Do as complete, on the **To-Do** tab, click the **Status** arrow, then select **Complete**; to mark a Call as complete, click the **Status** arrow on the **Call** tab to select **Complete**.



In the To-Do List, you can mark a To-Do or Call as complete by clicking once in the To-Do check box or on the Call phone icon appearing in the left-hand column of the list.

3. Click **OK**.

A check mark appears next to the Event in the To-Do List, indicating that Eudora Planner records it as complete. The Event will not appear on the To-Do List on subsequent days.

Using Other Types of Events

This section explains how to add Holidays, Special Events, Banners, and Sticky Notes to your Calendar.

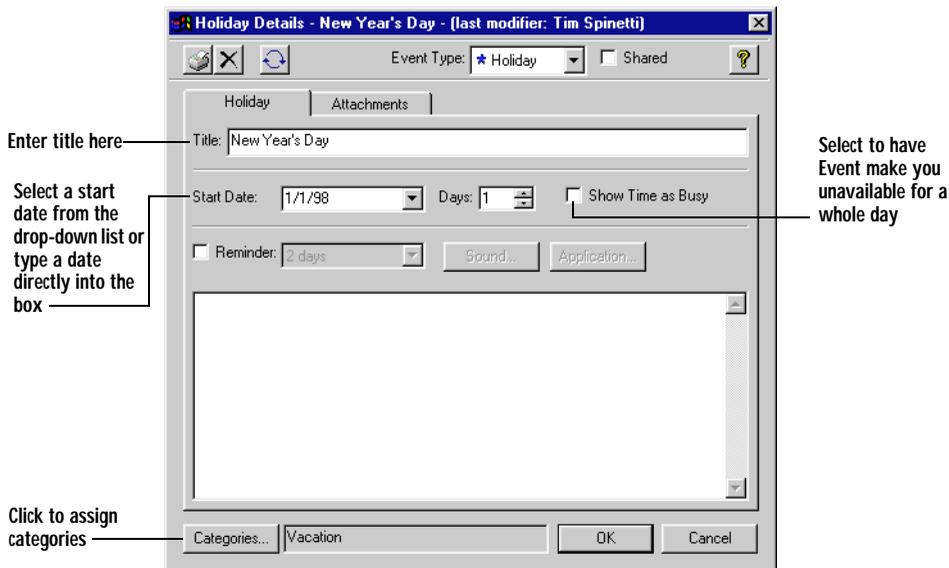
Scheduling Holidays and Special Events

Schedule Holidays to indicate national, local, religious, or company holidays. Use Special Events for important occasions that span a whole day and don't have a specific time, such as birthdays, anniversaries, conferences, or vacation days.

To schedule a Holiday or Special Event:

1. From the **Insert** menu, select **Other Event Types**, then select **Holiday** or **Special Event** from the submenu that appears.

The Holiday or Special Details dialog box appears. The Event Type box indicates a Holiday or Special Event.



To add a new Holiday or Special Event to your Calendar, right-click in any View, then select **New** from the shortcut menu; from the submenu that appears, choose **Holiday** or **Special Event**.

2. In the **Title** box, type a name for the Event.
3. If necessary, change the date in the **Start Date** box.

To change the date, click the arrow in the **Date** box. A month-view calendar appears, from which you can select a date. If you need to select a different month, click the arrow buttons. You can also type a date into the box using the *mm/dd/yy* format.

4. If necessary, change the duration in the **Days** box.
5. If you want to be reminded of this Event, set a reminder. See [“Using Reminders” on page 38](#) for more information on reminders.
6. Click **OK**.

The Event is saved and appears in your Calendar.

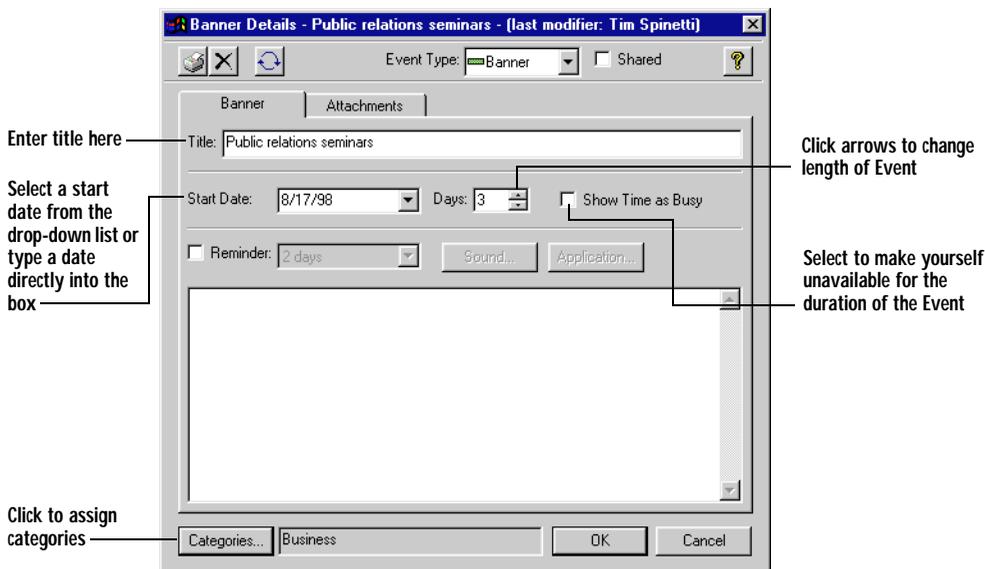
Adding Banners

For Events that span multiple days, such as conventions or vacations, add a Banner to your Calendar. Banners appear in each Calendar view, including the Day View.

To add a Banner:

1. From the **Insert** menu, select **Banner**.

The Banner Details dialog box appears. The Event Type box indicates a Banner.



You can add a Banner by right-clicking in any Calendar View, then selecting **New** from the shortcut menu; from the submenu that appears, select **Banner**.

2. In the **Title** box, type a name for the Banner.
3. If necessary, change the start date of the Banner in the **Start Date** box.
You can type a date or click the arrow in the **Date** box. When you click the arrow, a month-view calendar appears, from which you can select a date. If you need to select a different month, click the arrow buttons.
4. If necessary, change the duration of the Banner in the **Days** box.
5. If you want to be reminded of this Event, set a reminder. See [“Using Reminders” on page 38](#) for more information on reminders.
6. Click **OK**.

The Banner is added to your Calendar.

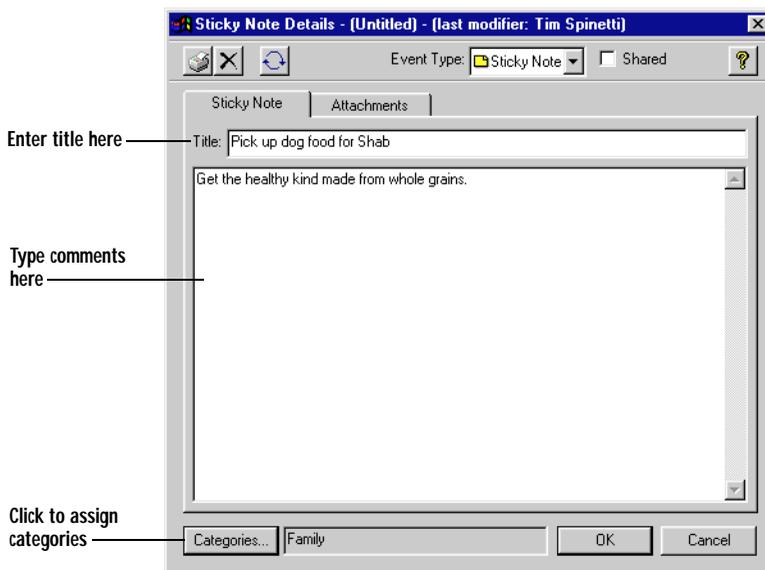
Using Sticky Notes

Just as you might tape notes on your computer monitor to remind you of important tasks or events, you can use Sticky Notes to post attention-getting messages on your Calendar. A Sticky Note can be resized to better fit your Calendar view, and can be dragged from day to day until you no longer need to see the message it contains.

To add a Sticky Note:

1. From the **Insert** menu, select **Other Event Types**, then select **Sticky Note** from the submenu that appears.

The Sticky Note Details dialog box appears. The Event Type box indicates a Sticky Note.



*Create a new Sticky Note by right-clicking in any Calendar View, then selecting **New** from the shortcut menu; from the shortcut menu that appears, select **Sticky Note**.*

2. In the **Title** box, type a name for the Sticky Note.
3. Type your comments into the field below the Title box.
4. Click **OK**.

The Sticky Note is saved and appears in your Calendar with the title you've given it.

5. In the Week or Month View, move or resize the Sticky Note as desired.

To move the Sticky Note, drag its top edge. To resize it, place the pointer over the bottom right corner (it turns into a double-headed arrow), then click and drag to the desired size.

Setting Up Repeating Events

Your schedule might include Events that repeat on a regular basis, such as weekly staff meetings or regular appointments with an important client. With Eudora Planner, you can create an Event once and have it repeat on a regular basis for as long as is necessary. This is a good way to set up your regular, recurring meetings.

To set up a Repeating Event:

1. Double-click the Event to open the Event Details dialog box.



2. Click the **Repeating Event Options** button.

The Repeating Event dialog box appears.

3. Select an option in the **Common Repeating Sequences** box or **Custom Repeating Sequences** box.
4. Choose an option in the **Repeat Sequence Ending** box. Select **End after** to specify the exact number of times you want the Event to repeat, or select **End by** to pick a specific day on which the repeat sequence terminates.
5. Click **OK**.

The Event now repeats throughout the Calendar at the interval you set.

Using Reminders

Eudora Planner can remind you of an upcoming Event—minutes, hours, or days before it occurs—by displaying a dialog box, playing a sound file, or launching another application. Eudora Planner’s reminders appear even when Eudora Planner isn’t running. The following sections describe how to set up and respond to reminders.

Setting Up Reminders

You can specify when and how a Eudora Planner reminder should alert you to an impending Event.

To set up a Reminder:

1. Double-click the Event to open the Event Details dialog box.
2. If the Event is a Call, select the **Schedule** tab. Otherwise, select the tab with the same name as the Event (that is, if the Event is a Meeting, select the **Meeting** tab).
3. Select **Reminder**.

The Reminder options become available.



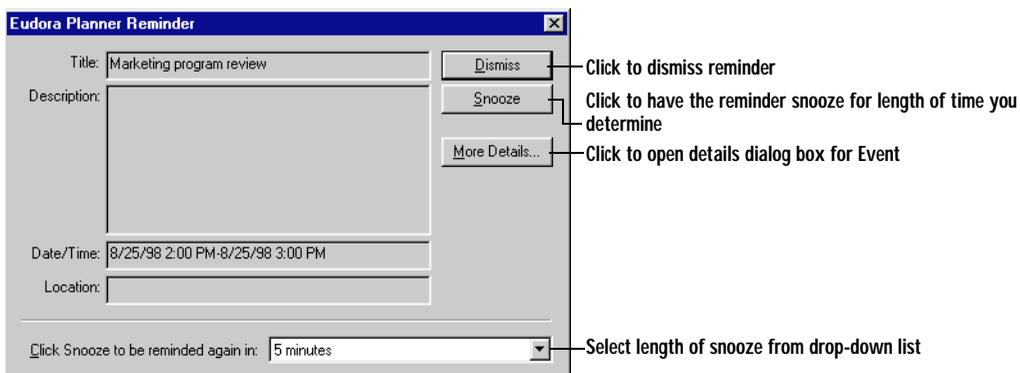
You must assign a date to a To-Do or Call Event before you can designate a reminder.

4. Click the **Reminder** arrow to select the amount of time prior to the Event you want to be reminded.
5. If you want a sound to accompany the Reminder, click **Sound** to open the Reminder Sound dialog box, then select the **Play sound on reminder** option. To select a sound that you have used for previous reminders, click in the drop-down list; to find and select a new sound, click **Browse**. Once you’ve made your selection, click **OK**.
6. To have Eudora Planner remind you by launching another application, click **Application** to open the Reminder Application dialog box, then select the **Run on Reminder** option. For example, if the reminder is for a To-Do entitled “Prepare Budget,” you might have Eudora Planner launch your spreadsheet application. To select an application that you’ve used previously, click in the drop-down list; to find and select a new application, click **Browse**. Once you’ve made your selection, click **OK** to return to the Event Details dialog box.
7. Click **OK** to close the Event Details dialog box.

The Event is set to remind you at the time you’ve chosen, in the manner you’ve specified.

Responding to Reminders

To respond to a Reminder dialog box, click the **Dismiss** button to acknowledge it and not be reminded again. Or, select a **Snooze** option in the Reminder dialog box to have the Reminder appear again after an interval of time you've specified.



If you set a Repeating Event to remind you, the Reminder occurs for each time the Repeating Event appears on your Calendar. When you dismiss the Reminder, you dismiss only the Reminder for the current day's Event.

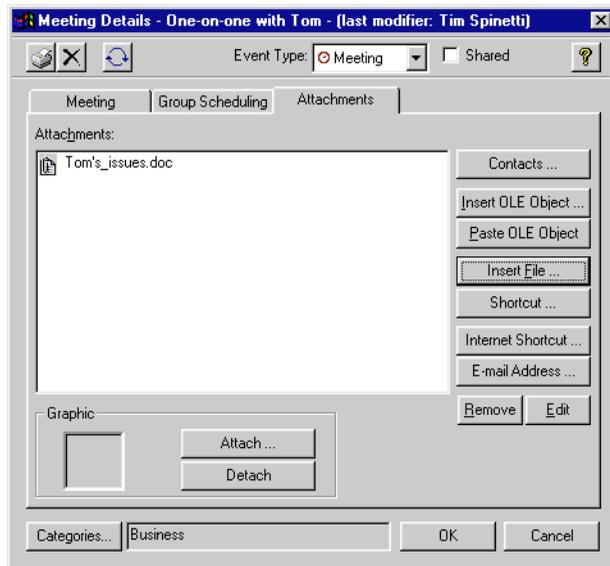
Attaching Items to Events

Your Calendar Events can contain notes and documents created in other applications. You can also embed Object Linking and Embedding (OLE) objects from OLE-compatible programs and attach e-mail addresses and web pages on the Internet.

Attaching Files to Events

You can attach files to Eudora Planner Events in two ways: by inserting the file or by creating a shortcut to it from within the Event. When you insert a file into an Event, the file is copied into your Eudora Planner database, where it is stored until either the inserted file or Event is deleted. When you add a shortcut to a file, only a reference to the file is stored in your Eudora Planner database, saving you from reducing space on your hard drive.

Both inserted files and shortcuts appear in the Event's Attachments list. You can double-click on the name of the inserted file or shortcut to open that file in the application that created it.



! *Inserting files into your database will increase its size. If you need to keep your database small, then create shortcuts to the files instead of inserting them. However, if you move your database file to another computer and open it with Eudora Planner, the files inserted into the Event remain available, whereas shortcuts to files will no longer work, as the files themselves are no longer available.*

To insert a file into an Event:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click **Insert File**.
An Open dialog box appears.
3. Locate and select the file you want to insert into your Event, then click **Open**.
The file name appears in the Attachments list and the file is copied into your database. When you double-click the file's name, the application that created the file opens it.

To link a file to an Event with a shortcut:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click **Shortcut**.
An Open dialog box appears.
3. Use the Open dialog box to locate and select the file you want to add to your Event, then click **Open**.

The file name and a shortcut icon appear in the **Attachments** list as a reference to the file. When you double-click the filename, the application that created the file opens it.

To remove an inserted file or shortcut from an Event:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click the file or shortcut in the Attachments list box.
The name is highlighted and the **Remove** button becomes available.
3. Click **Remove**.

The file or shortcut is removed from the Event.



When you remove an inserted file from an Event, the file is deleted only from the Eudora Planner database. Any other copies of the file residing on your system are not affected. Removing a shortcut deletes only the reference to the external file, and does not change the file in any way.

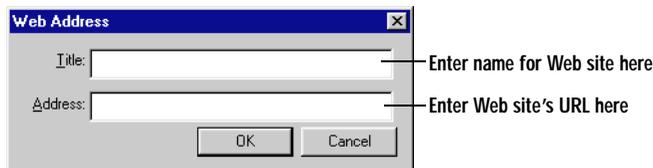
Attaching Web Sites and E-mail Addresses to Events

You can attach e-mail addresses and Web sites to Events. When you click on an attached e-mail address, your preferred e-mail program launches and creates a pre-addressed message. When you click on an attached URL, your preferred Web browser launches, searches for the Web site, and, if successful, loads the Web page in the browser window.

To attach a Web site to an Event:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click **Internet Shortcut**.

The Web Address dialog box appears.



3. Type in the name for the Web site in the **Name** box.

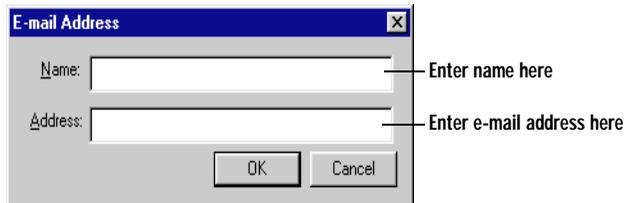
4. Type the URL of the Web site in the **Address** box.
5. Click **OK**.

The web site is added to the Attachments list. Clicking the icon next to this site launches your browser and loads the Web site.

To attach an e-mail address to an Event:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click **E-mail Address**.

The E-mail Address dialog box appears.



3. In the **Name** box, type the name of the person or company you want to associate with the e-mail address.
4. Type the e-mail address in the **Address** box.
5. Click **OK**.

The name associated with the e-mail address appears in the Attachments list. Clicking the mail icon next to the address activates your e-mail program and creates a new message.

Attaching OLE Objects

Eudora Planner supports Object Linking and Embedding (OLE), which lets you attach objects from other OLE-compliant Windows applications—like spreadsheets, charts or documents—to Events in your calendar.

To insert an existing OLE object:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click **Insert OLE Object**.

The Insert Object dialog box appears.

3. Select the **Create from File** option.
4. Click the **Browse** button to locate the file you want to link, or type the pathname of the file if you know it.
5. Click **OK**.

The object appears in the Attachments list. The OLE-compliant program starts, then opens the object for editing.

To insert a new OLE object:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click **Insert OLE Object**.
The Insert Object dialog box appears.
3. Select the **Create New** option.
4. In the **Object Type** list, select the type of OLE object you want to create.
5. Click **OK**.

The OLE-compliant application starts, allowing you to create an object of the type you selected. The object appears in the Attachments list.

To paste an OLE object:

1. In the Event Details dialog box, click the **Attachments** tab.
2. In your OLE-compliant program, copy the OLE object to the Clipboard.
3. In Eudora Planner, click **Paste OLE Object**.

The OLE object appears in the Attachments list.

To remove an OLE object:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click the name of the object in the Attachments list.
3. Click **Remove**.

Eudora Planner removes the OLE object from the list.

Attaching Contacts to Events

You can attach Contacts from your Address Book to Events that you create in your Calendar. For example, if you schedule a conference call with three different people that are Contacts in your Address Book, you can attach their Contacts to the Call Event. The names of the Contacts will appear in the Attachments area of the Call, and the Call will be recorded in the History section of each Contact's Details View.

To add a Contact to an Event:

1. Double-click the Event to open the Event Details dialog box, then click the **Attachments** tab.
2. Click the **Contacts** button.

The Attach Contacts dialog box appears.



3. In the **Find Method** box, choose whether you want to search among specific Contacts, QuickContacts, or all Contacts to find the ones you want to attach.
 - Use the **Find Contact** option to search for specific Contacts using the Find What box.
 - Choose Quick Contacts or All Contacts to populate the Matching Contacts list with every Contact, or every Quick Contact, in your Address Book. Skip to step 5 if you choose one of these methods.
4. In the **Find What** box, begin typing the name of the Contact you want to attach to this Event.

As you type, Eudora Planner searches your Address Book for names matching the text you're typing. Matching names appear in the Matching Contacts list.

5. In the Matching Contacts list, select the Contacts you want to attach to the Event, then click **Attach**.

The selected Contacts move to the Attached Contacts list.

6. Click **OK**.

The Contact is attached to the Event and appears in the Event's Attachments area. Also, the Event is added to the History area in the Contact's Details dialog box.

Getting More Out of the Calendar

The following sections describe some advanced features of the Eudora Planner Calendar, including:

- Cutting, copying, pasting, and moving Events
- Using Eudora Planner's search feature to find specific Events
- Changing the appearance of Events so that you can visually organize your Calendar
- Using Event templates to save time when creating new Events

Editing Events in Any Calendar View

You can modify the time and date of an Event, without opening its Event Details, by moving or pasting it to a new position on the Calendar.

Cutting, Copying and Pasting Events

From the Edit menu, you can Cut and Copy Events. Click the Event to select it, then select **Cut** or **Copy**. To paste an Event, click to set the insertion point on the Calendar, then select **Paste**. Other than the date of the Event, all information remains the same.



*In any Calendar View, you can cut, copy, and paste an Event by right-clicking it, then selecting **Cut**, **Copy**, or **Paste** from the shortcut menu that appears.*

Moving Events

After you create an Event, you may want to move it to another time and date on the Calendar. You can do this by simply dragging the Event from one time and date to another. You don't need to open the Event Details dialog box. Use the appropriate view—Day, Week, or Month—depending on how far you want to move the Event.



You can also drag Events into your Eudora Planner Calendar from Internet web sites created with the Eudora Planner Web Publisher.

Finding Events

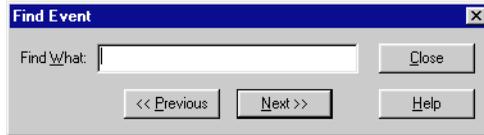
If you need to find an Event, you can search for it by name.

To find an Event:



1. From the **Event** menu, select **Find**.

The Find Events dialog box appears.



*You can initiate a search by right-clicking anywhere on the Calendar and selecting **Find** from the shortcut menu that appears.*

2. Type the name of the Event in the box.
3. Click **Previous** to search the Calendar prior to the date you have presently opened or selected in the Calendar View. Click **Next** to search dates after and including the date showing in the Calendar View.

If the Event is found, Eudora Planner brings you to the date the Event and outlines it. If the Event is not found, a dialog box appears giving you the option to try another search.

Changing the Appearance of Events

Eudora Planner gives you control over the “look” of your Calendar. After you create an Event, you can change its text style and color. You can also attach pictures to Events. The changes you make here override the style assigned to the Event by the category.

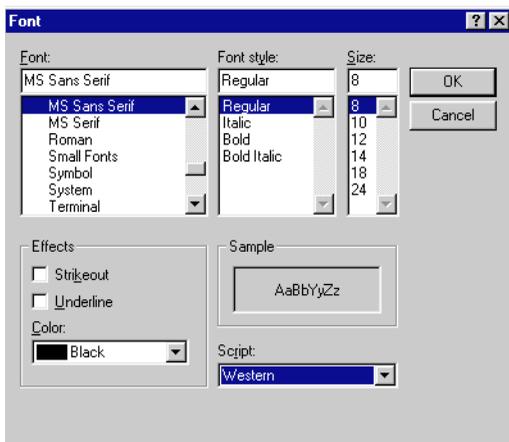
Changing Event Text and Color

You can give your Events distinctive appearances in order to more easily differentiate them from each other.

To change an Event's style:

1. Click to select the Event in any view.
2. From the **Format** menu, select **Font**.

The Font dialog box appears.



You can also change the font by right-clicking the Event, then selecting **Font** from the shortcut menu that appears.

3. Click to select settings for **Font**, **Font Style**, and **Size**. Select **Color** and **Effects** options as well, if you like. Click **OK**.

Your font preferences are applied immediately.

4. From the **Format** menu, select **Background Color**.

The Color dialog box appears.

5. Select a background color for the Event, then click **OK**.

The Event appears according to your settings you've selected.

Adding Pictures to Events

You can give your Calendar more visual appeal by attaching picture to your Events.

To add a picture to an Event:

1. Double-click the Event to open the Event Details dialog box, then click the **Attachments** tab.

2. In **Graphics** box, click **Attach**.

An Open dialog box appears.

3. Select a picture file, then click **OK**.

The picture appears in the **Graphic** box.

4. Click **OK**.

In any view, the picture appears as an icon next to the title of the Event.

Using Event Templates

You may find that you often create Events that contain mostly the same information and attachments as existing Events in your Calendar, such as Meetings that always include the same group of invitees or To-Dos to which you regularly assign the same categories. You can use Event templates to simplify the creation of Events like these. Once you've created a template, you can select it from the menu anytime to create a new Event containing that information.

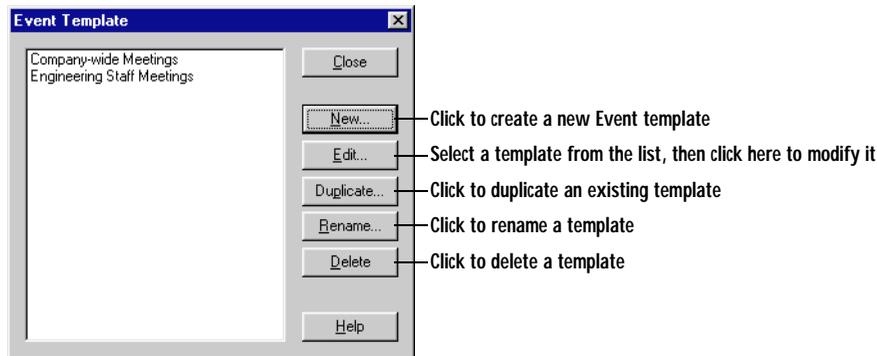
Creating Event Templates

You create an Event template using the same basic steps as for creating a new Event. After you create the template, it appears in the **Event from Template** submenu of the **Insert** menu.

To create a new Event template:

1. From the **Insert** menu, select **Event from Template**, then select **Define Event Templates** from the sub-menu.

The Event Template dialog box appears.



Create a new Event template by right-clicking on any Calendar View, selecting **New** from the shortcut menu, then selecting **Event from Template**. From the submenu that appears, select **Define Event Templates**.

2. Click **New**.

The Create a New Template dialog box appears.

3. In the **Create a New Template** box, type a name for the template. Click **OK**.

The Event details dialog box appears with a heading that indicates that it is a template.

4. Type information and select options for the template as you would to create a new Event.

See [“Adding Events to the Calendar”](#) on page 22 for more information. You can also add Contacts, attachments, e-mail addresses and links to web sites. To learn more about these options, see [“Scheduling Users, Rooms, and Resources for Meetings”](#) on page 130. Click **OK**.

The template is saved and becomes available from the Insert menu.

Creating Events from Templates

After you create an Event template, you can use it to create new Events that contain similar information and attachments. You can add or modify the information and attachments in the new Event as needed.

To create Events from Templates:

1. From the **Insert** menu, select the **Event from Template** sub-menu, then the name of the template.

The Event Details dialog box appears. All information and attachments in the template appear in the new Event.



*You can open an Event Template by right-clicking anywhere in any Calendar View, selecting **New** from the shortcuts menu, then selecting **Event from Template**. From the submenu that appears, select the template you want to use for this Event.*

2. Select options, as appropriate, for the Event.

You can add or modify any information in the Event.

3. Click **OK**.

The new Event appears on your calendar.

Handling Meeting Invitations

If you are using Eudora Group Planner, other users can invite you to meetings. When they do, Eudora Group Planner notifies you immediately by placing an icon in the task bar.

Responding to Meeting Invitations

When another user invites you to a Meeting, Eudora Planner puts a *Meeting Notices* icon in your Taskbar. Click this icon to open the Meeting Notices dialog box, where you can view the title, date, and time of the Meeting, the name of the Meeting’s creator, and whether your attendance is required or optional. You can then choose to accept or decline the Meeting invitation.

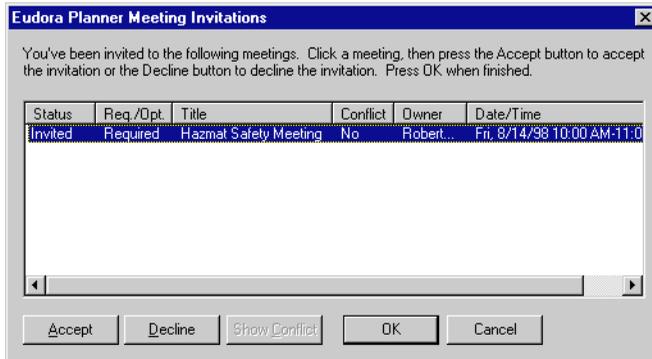
You can also respond to Meeting invitations from the View menu, which is explained below.



To respond to Meeting invitations:

1. From the **View** menu, select **Meeting Invitations**.

The Meeting Invitations dialog box appears, containing a list of invitations to Meetings.



2. For each invitation in the list, click to select it, then click the **Attend** or **Decline** button.

If you choose Attend, the meeting will block time in your schedule. If you choose Decline, the meeting will be deleted from your Calendar.

3. When you've responded to all invitations, click **OK**.

Your responses will appear in the Details dialog box for each Meeting. The user who created the Event will be able to see whether you've accepted or declined the invitation.

Setting Your Availability for Meetings

Other Eudora Planner users in your workgroup can invite you to meetings. Eudora Planner lets you define the range of time you're available for these meetings. Of course, Events that you're already committed to also block your available time; other users can invite you to a meeting, but are able to see that you are already busy.

To set your availability for Meetings:

1. From the **Tools** menu, select **Calendar Preferences**.

The Calendar Preferences dialog box appears.

2. Click **Availability**.

The Meeting Availability dialog box appears with your name at the top.

Meeting Availability

Name: Tim Spinetti

| | From: | To: |
|---|----------|----------|
| <input checked="" type="checkbox"/> Monday | 12:00 AM | 11:59 PM |
| <input checked="" type="checkbox"/> Tuesday | 12:00 AM | 11:59 PM |
| <input checked="" type="checkbox"/> Wednesday | 12:00 AM | 11:59 PM |
| <input checked="" type="checkbox"/> Thursday | 12:00 AM | 11:59 PM |
| <input checked="" type="checkbox"/> Friday | 12:00 AM | 11:59 PM |
| <input checked="" type="checkbox"/> Saturday | 12:00 AM | 11:59 PM |
| <input checked="" type="checkbox"/> Sunday | 12:00 AM | 11:59 PM |

Unavailable during lunch

OK Cancel Help

3. Select the days of the week that you are available.

As you select each day, default times appear in the From and To boxes for that day and the first time is highlighted.

4. In the first **From** box, type your available time. Then, press the **Tab** key to move to the **To** box and type the time when you are no longer available. Specify your availability for the rest of the week in this way.
5. Select the **Unavailable During Lunch** box, if appropriate, and type in your regular lunch time if different from the default of 12-1 PM.
6. Click **OK**.

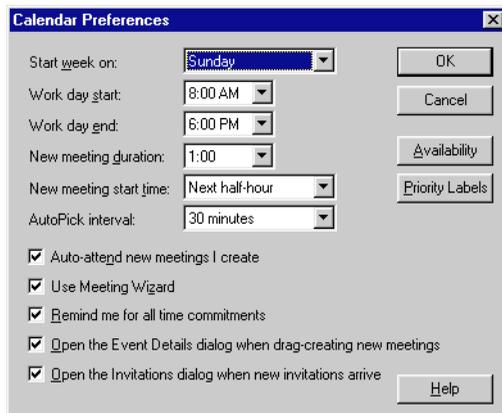
Your availability settings are immediately saved by the public server. Other users who schedule you for meetings can see the times you are available.



If you change your availability while you are not connected to the Public Server, your changes won't be visible to other users until the next time you connect.

Setting Calendar Preferences

Eudora Planner's Calendar preferences let you change the appearance of your Calendar to accommodate your normal work schedule, set defaults for the creation of Events, and create custom priority labels to assign to To-Dos and Calls. To set your Calendar preferences, from the **Tools** menu, select **Calendar Preferences**. The Calendar Preferences dialog box appears.



To change the first day of your week, select a day from the **Start Week on** list. The weeks shown in the Calendar Month View begin with the day you select.

To change the start and end times of your work day, select hours on the **Work day start** and **Work day end** lists. Your availability for Meetings and the unshaded hours in the Day and Multi-Day Calendar Views will be limited to the hours you select.

You can select the duration for new Events from the **New meeting duration** list. All new Events you create will have a default duration of the time you set here.

Similarly, changing the **New meeting start time** affects the default time of new Meeting Events created using the Insert Meeting command. You can choose to have new Meetings start at the current time or at the start of the nearest half hour or full hour.

The **Auto-Pick interval** setting determines the increments of available time that the Auto-Pick feature will consider when scheduling meetings between selected invitees on the Group Scheduling tab of the Meeting Details dialog box. You can choose an increment of 15, 30, or 60 minutes.

The **Auto-attend new meetings I create** check box, when selected, causes Eudora Planner to automatically schedule you as an attending invitee of meetings that you create.

The Meeting Wizard is enabled and disabled by the **Use Meeting Wizard** check box. This option is enabled by default. Clearing this check box disables the Meeting Wizard so that when you create a new Meeting using the Insert Meeting command, the Meeting Details dialog box appears instead of the wizard.

To free yourself from having to set reminders, you can have Eudora Planner remind you of all Events by selecting the **Remind me for all time commitments** option. When this check box is selected, every Event that makes you unavailable will remind you five minutes prior to its start time.

To have the Event Details dialog box appear automatically when you create a new Meeting, select the **Open the Event Details dialog when drag-creating new Meetings** option.

From this dialog box you can also set up your availability for meetings and priority labels for Calls and To-Dos. For more information, see [“Setting Your Availability for Meetings” on page 50](#) or [“Tracking To-Dos and Calls” on page 31](#).

Chapter 3

Using the Address Book

Eudora Planner's Address Book lets you manage important information about the people and companies you interact with throughout the day. The individual records of people and organizations in the Address Book are called *Contacts* in Eudora Planner. Your Contacts store basic data such as names and addresses, and also provide a way to organize and access more dynamic information, including links to external documents and the Internet. You can track your interactions with these people and companies through links to the Eudora Planner Calendar.

In this chapter, you will learn how to add Contacts to your Address Book, as well as how to locate specific Contact information, track your telephone calls and e-mail, and find additional Contact information on the Internet.

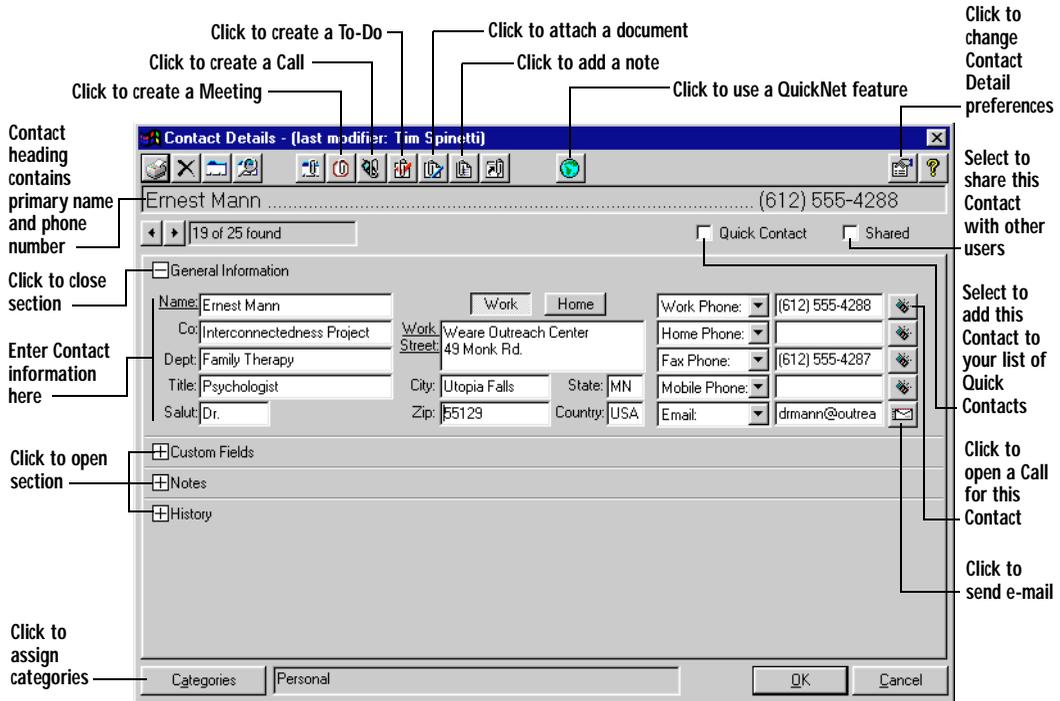
Creating Contacts

Contacts are the people and organizations in your Address Book. A Contact's information can include a name, company name, home and work addresses and telephone numbers, as well as a history of meetings, telephone calls, letters, and notes associated with the Contact.

To create a new Contact:

1. From the **Insert** menu, select **Contact**.

The Contact Details dialog box appears.



2. Type personal and company information into the **Name**, **Company**, **Department**, and **Title** fields.

Press Tab to move to the next field or Shift+Tab to return to the previous field.

3. If you want the Contact to appear in the QuickContact menu, click the **Quick Contact** checkbox.
4. Enter a home address, work address, or both. Select the type of address you want to enter by clicking either the **Work** or **Home** button above the address boxes.
5. To add telephone numbers, e-mail addresses, and URLs, select an item from one of the five connection field drop-down lists. In the box next to the item you've chosen, type a telephone number, URL, or e-mail address, whichever is appropriate.

If you need to store more than five telephone numbers or Internet addresses, you can create custom fields. See [“Using Custom Fields” on page 30](#) for more information.

6. Click **OK**.

Eudora Planner adds the Contact to the Address Book.



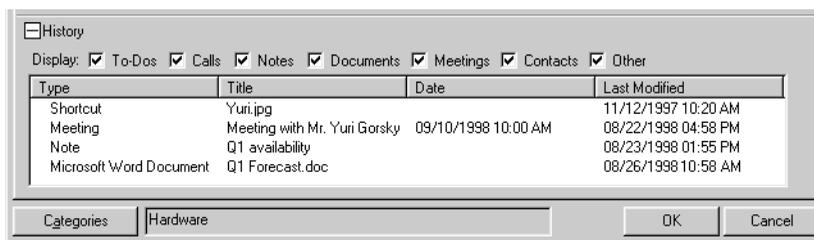
You might find that you often create Contacts that contain much of the same information as other Contacts in your Address Book, such as those you create for people who work for the same company. For Contacts like these, you can create templates that already contain common information, saving you from unnecessarily re-entering data. For details about creating Contacts based on your custom templates, see “Using Contact Templates” on page 35.

Adding Information to Contacts

Eudora Planner’s Address Book gives you the ability to track more information about your Contacts than just names, addresses, and phone numbers.

You can create custom fields to store important data that can’t be placed in standard fields such as Name, Company, and Address.

You can attach Calendar Events, other Contacts, and free-form notes to each Contact’s History list. The History list can also store shortcuts to other files or applications, as well as links to related documents, whether they reside on your computer, on your network, or on the Internet.



Using Custom Fields

You can create custom fields to hold information not included in the general Contact information fields.

When you create a custom field, you give it a unique name, then specify the type of data it can contain, such as a number, a date, or text.

For example, you could create a custom field named *Birthday* to keep track of the birthdays of your friends and business associates. You would assign such a field a type of *date*, so it can contain only dates. You might also make a *Birthcard* field, with a type of *Yes/No*, to indicate whether or not a particular Contact should receive a birthday card.

Because a custom field is defined to contain a certain type of data, the information in that field is in a consistent format throughout your Address Book, assuring accuracy when you do searches and sorts based on that information.

Creating Custom Fields

When you create a new custom field, you name the field, then specify the type of information you want the field to contain. You can choose from ten field types:

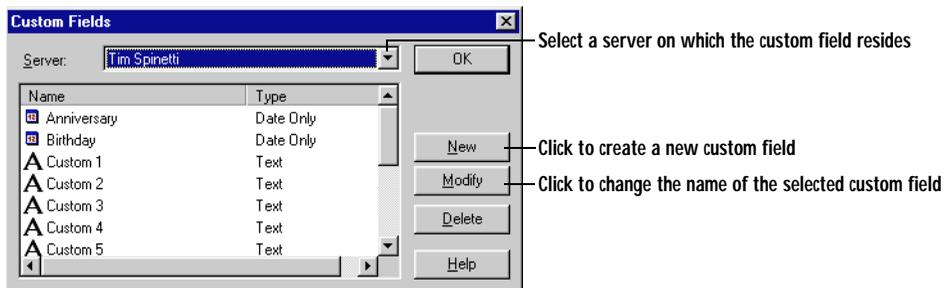
| Field Type | Contains... |
|---------------------|-------------------------------------|
| Yes/No | A simple yes or no option |
| Date and Time | The date and time (timestamp) |
| Date and Time Range | Starting and ending dates and times |
| Date Only | A single date |
| E-mail | An e-mail address |
| Number | Any positive or negative number |
| Phone | A telephone number |
| Text | Plain text information |
| Time Only | A single time |
| Web Page | A URL |

Once you've assigned a field type to a custom field, the field can only contain information designated for that type.

To create a Custom Field:

1. From the **Tools** menu, select **Custom Fields**.

The Custom Fields dialog box appears.

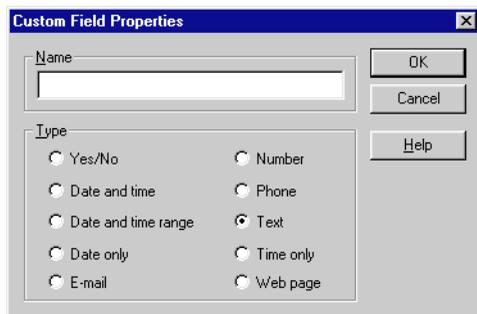


2. Click the **Server** arrow to display a list of available servers. Select a server from the list.

A default server is already selected for you. If you're using Eudora Group Planner, you can select a workgroup server from the **Server** list, thereby making the custom field available to other users connected to that server.

3. Click **New**.

The Custom Field Properties dialog box appears.



4. Type a name for the field in the **Name** box.
5. Select a field type. Your options are described in the preceding table.
6. Click **OK**.

Eudora Planner adds the field to your database. Any custom fields saved to a workgroup server are available to other users on the network.

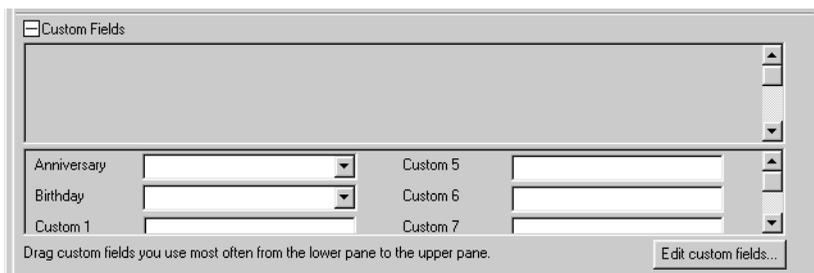
Organizing the Custom Fields Section

The custom fields you create in your database appear in the Contact Details dialog box for each Contact in your Address Book. If you're using Eudora Group Planner, your Contacts also contain any public custom fields stored on the servers to which you're connected.

To help you better organize your custom fields, and so that you can quickly find those fields most vital to you, the Address Book's Custom Fields section is divided into two areas. The lower area contains those custom fields installed with Eudora Planner, as well as the custom fields you yourself have created and any fields residing on workgroup servers you've connected to. The upper area is, by default, empty, but can accommodate any of the custom fields you choose to move from the lower area; it is here that you place those custom fields that are important to you. You can still enter and change data, as your access privileges allow, in custom fields that remain in the lower area.

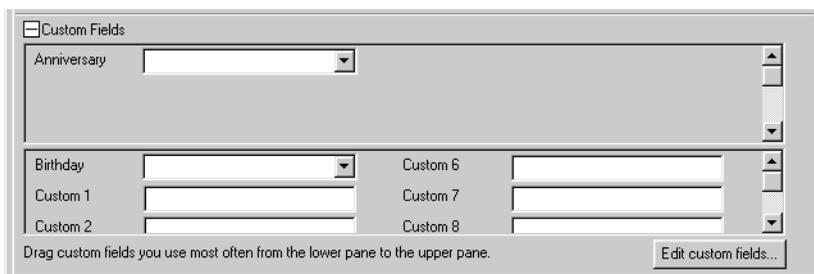
To organize the Custom Fields section:

1. Open any Contact in your Address Book.
The Contact Details dialog box appears.
2. In the Contact Details dialog box, click the plus sign next to **Custom Fields**.
The Custom Fields pane appears.



3. In the lower area of the Custom Fields section, click the name of a custom field.
The custom field becomes outlined.
4. Drag the custom field into the upper area of the Custom Fields section.
5. Click **OK**.

The field appears in the upper area of the Custom Fields section in every Contact in your Address Book. If you decide to change the location of the field, you can drag it back to the lower area at any time.



Changing Custom Field Names

Eudora Planner allows you to change the name of the custom fields you create.

To change the name of a Custom Field:

1. From the **Tools** menu, select **Custom Fields**.
The Custom Fields dialog box appears.
2. In the list of custom fields, click the name of the field you want to change.
The custom field name becomes highlighted.
3. Click **Modify**.
The Custom Fields Properties dialog box appears.

4. Type the new name into the **Name** box.
5. Click **OK** to close the Custom Field Properties dialog box, then click **OK** to close the Custom Fields dialog box.

The custom field name is changed for all Contacts in your Address Book.



Although you can change the name of a custom field, you cannot change its type.

Deleting Custom Fields

You can delete from your Address Book any custom fields that you no longer need.

To delete a Custom Field:

1. From the **Tools** menu, select **Custom Fields**.
2. In the list of Custom Fields, click the name of the field you want to delete.
The Custom Field name is highlighted.
3. Click **Delete**.
4. Click **OK**.

The custom field is deleted from any Contacts in your Address Book.



You cannot delete a custom field if any Contact in your Address Book still contains data for that custom field.

Attaching Other Information to Contacts

In addition to containing personal and business information, your Contacts can also contain links to attached Calendar Events, notes, and documents. These attachments appear in the Contact's History, where you can view them by double-clicking them.

Attaching New Events to Contacts

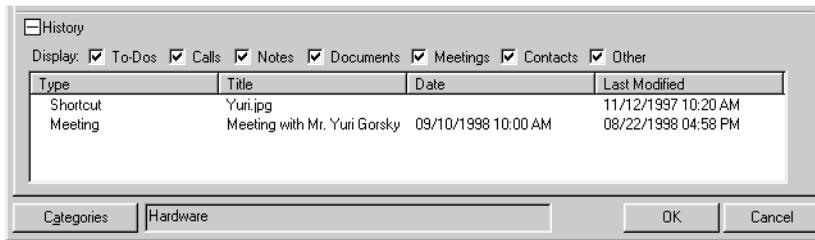
You can attach related Events to a Contact. Attached Events appear in the Contact's History, where you can view them by double-clicking them.

Existing Events must be attached to Contacts from within the Calendar. For details, see [“Adding Contacts to Events” on page 24](#).

To attach an Event to a Contact:

1. Double-click the Contact in the Address Book.
The Contact Details dialog box appears.
2. Click either the **Attach Meeting**, **Attach Call**, or **Attach To-Do** button in the Contact Details dialog box.
The Event Details dialog box appears.
3. Fill in the details for the Event. For more explanation, see [“Adding Events to the Calendar” on page 16](#).
4. Click **OK**.

The Event appears in the History list.



You can also attach an Event to a Contact by right-clicking the Contact in the List View, then selecting an Event type from the options displayed in the shortcut menu that appears, which opens an Event Details dialog box. Once you've finished entering information for the Event, click **OK**. The Event is attached to the Contact.

To remove an attached Event from a Contact:

1. Double-click the Contact to open its Details dialog box.
2. Open the **History** section.
3. Select the Event you want to delete, then press the **Delete** key.

The Event is removed from the Contact's History list, but is not deleted from the Calendar.



You can remove an Event from a Contact by right-clicking it in the History list, then selecting **Delete** from the shortcut menu that appears.

Adding Notes to Contacts

You can attach your own notes to Contacts in the Contact Details dialog box.

To add a note to a Contact:

1. Double-click the Contact to which you want to add the note.

The Contact Details dialog box appears.

2. In the **Notes** box, type your note, then click **Add to History**.

The Note dialog box appears.

3. In the **Title** box, type a title for the note.
4. Click **OK**.

The title of the note appears in the History list, along with the date and time you created it. To view or edit the note, double-click it in the History list.

To delete a note from a Contact:

1. Double-click the Contact that contains the note.

The Contact Details dialog box appears.

2. Open the **History** section.
3. In the **History** list, select the note you want to delete, then press the **Delete** key.

The note is deleted from the Contact and no longer appears in its History list.



*You can delete a note by right-clicking it in the History list, then selecting **Delete** from the shortcut menu that appears.*

Attaching Documents to Contacts

You can attach an external document to a Contact so that it displays in the Contact's History list. When you double-click the document name, Eudora Planner opens it in the application that created it. Because the document is only aliased in the Contact and not inserted into the database, you can accumulate additional information related to your Contact without significantly increasing the size of the database.

To attach a document to a Contact:

1. Double-click the Contact to which you want to attach the document.
The Contact Details dialog box appears.
2. Click the **Attach Document** button.
The Select dialog box appears. Use this dialog box to navigate to find the document.
3. Click **OK**.
The name of the document appears in the History list of the Contact. You can view or edit the document by double-clicking it, which launches the application that created it.



You can also attach a document to a Contact by dragging and dropping into that Contact's record in the List View. The document will appear in the Contact's History list.

To delete a document attached to a Contact:

1. Double-click the Contact from which you want to remove the attached document.
The Contact Details dialog box appears.
2. Open the **History** section.
3. In the **History** list, select the document you want to delete, then press the **Delete** key.

The alias to the Contact is removed, but the original document is not deleted or altered in any way.



*You can delete an attached document by right-clicking that document in the History list, then selecting **Delete** from the shortcut menu that appears.*

Attaching a Contact to Another Contact

You can attach Contacts to each other to show a relationship more specific or narrow than that demonstrated by category affiliation, such as the relationship between a manager and an assistant, or that between law partners.

To attach a Contact to another Contact:

1. Double-click the Contact to which you want to attach another Contact.

The Contact Details dialog box appears.

2. Click the **Attach Contacts** button.

The Attach Contacts dialog box appears.



3. In the Find Method box, choose whether you want to search among specific Contacts, Quick Contacts, or all Contacts to find the ones you want to attach.
 - Use the **Find Contact** option to search for specific Contacts using the **Find What** box.
 - Choose **Quick Contacts** or **All Contacts** to populate the Matching Contacts list with every Contact, or every Quick Contact, in your Address Book. Skip to step 5 if you choose one of these methods.
4. In the **Find What** box, begin typing the name of a Contact you want to attach to this Contact.

As you type, Eudora Planner searches your Address Book for names matching the text you're typing. Matching names appear in the Matching Contacts list.

5. In the Matching Contacts list, select the Contacts you want to attach to the Contact, then click **Attach**.

The selected Contacts move to the Attached Contacts list.

6. Click **OK**.

The selected Contact is attached to the opened Contact and appears in the opened Contact's History. You can open the attached Contact's Details dialog box by double-clicking it in the History list.

Selecting Primary Fields

Your Address Book can contain Contact records for a wide variety of people you interact with, including business associates, friends, and relatives. For some of these people, like your business associates, the most vital Contact information is that which is work-related, such as company addresses and work phone numbers. For your friends and relatives, however, personal data, such as home address and phone number, is more important. Because the most important information varies for different types of Contacts, Eudora Planner lets you select *primary* fields for each individual Contact.

For each Contact, you can select a primary listing (either Name or Company), a primary phone number (Work, Home, Fax, or Mobile), and a primary address (Work or Home). When you've selected a field as primary, you can display, print and sort based on the information contained in that field. For example, you can configure a List View that displays the primary address column, that shows for each Contact the address field you've designated as primary, whether it be the Work or Home address.

Primary fields function in the following areas:

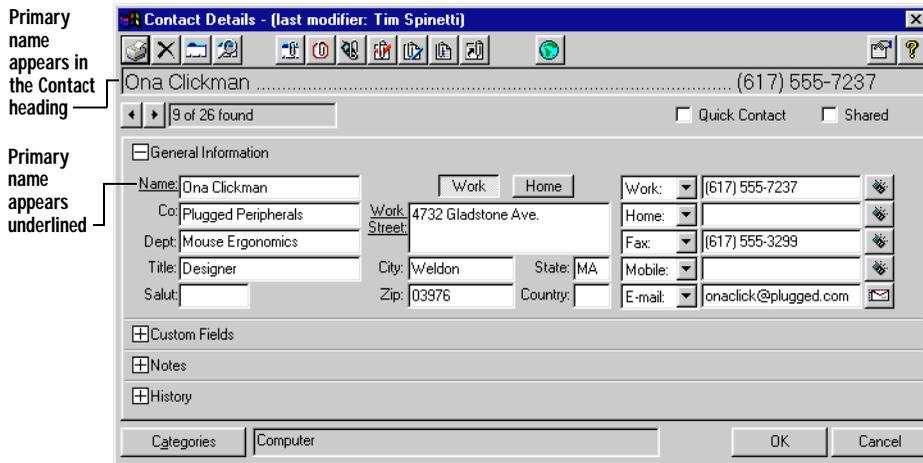
- The listing and phone fields you select as primary determine what information appears in the name and number listing at the top of the Contact Details dialog box.
- The address you select as primary determines which address displays when you open a particular Contact.
- Three columns that you can choose to display in the List View are affected by your primary field settings. What displays in the Listing Header depends on whether you select Name or Company as primary; the Primary Address field displays the address you select; and the Primary Phone field displays the telephone number, e-mail address, or URL you select.
- The phone field you select as primary determines which phone number, e-mail address, or URL appears for a Contact displayed in QuickContact.

You can select primary fields by clicking field names in the Contact Details dialog box. The names of the primary fields appear underlined.

To select primary listing and address fields:

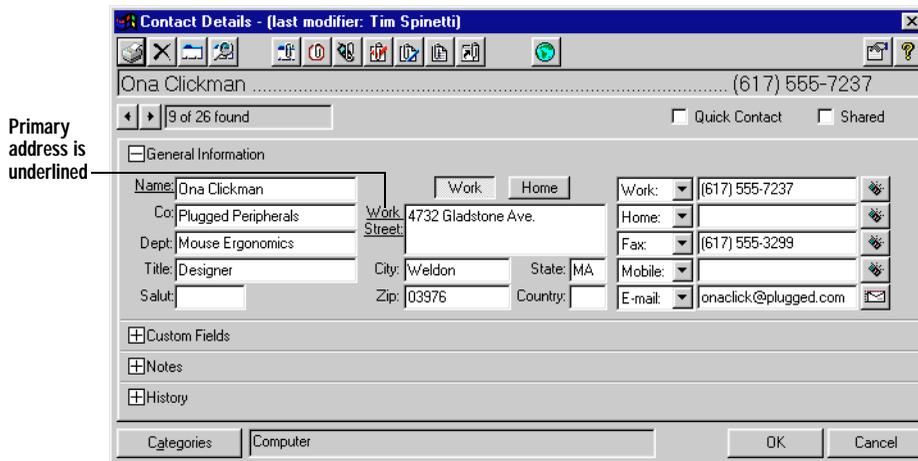
1. Open the Contact for which you want to select primary fields.
The Contact Details dialog box appears.
2. Click the title of the Listing field you want to select (either **Name** or **Company**).

The field you select is underlined, indicating that it is now the primary. Also, the listing at the top of the Contact Details dialog box changes to reflect your selection.



3. In the Address Area, click on either **Work** or **Home**, depending on which address field you intend to make the primary.
4. Click the title of the field you've selected.

The field name becomes underlined, indicating it is the primary field.

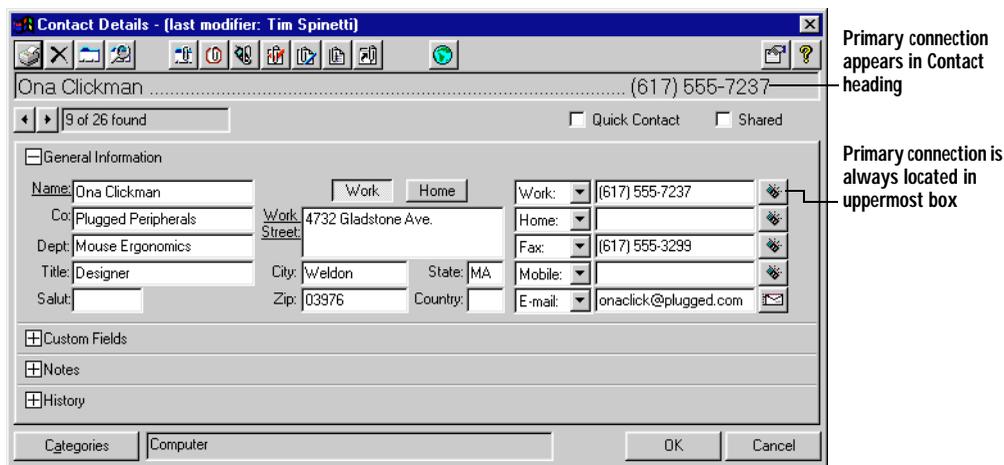


5. Click **OK**.
- The field you've selected becomes the primary field for this particular Contact.

To select a primary connection field:

1. Open the Contact for which you want to select the primary connection field.
The Contact Details dialog box appears.
2. Click the arrow in the uppermost connection field.
A drop-down list containing each type of connection field appears.
3. From the drop-down list, select the connection field you want to designate as primary.
4. If necessary, change the drop-down list setting for one of the four other connection fields to display the value that was previously in the primary connection field.
5. Click **OK**.

The phone number you've selected to appear in the uppermost connection field appears in the Contact heading, indicating that it is the primary.



Assigning Categories to Contacts

You can organize and show relationships between Contacts by assigning them to categories. To learn more about organizing Contacts with categories, see [“Assigning Categories to Contacts and Events” on page 85](#).

Using Contact Templates

You may find that you often create Contacts that contain much of the same information and attachments as others already in your Address Book, such as those for different people who work for the same company. You can avoid having to re-enter and attach the same information every time you add a new Contact by creating Contacts based on Contact Templates.

A Contact Template can contain information in any field, attached documents, notes and Events, and any categories you specify. Each time you create a Contact based on that template, Eudora Planner inserts all the specified information into your new Contact, which you can then modify as needed.

Creating Contact Templates

After you create a Contact template, Eudora Planner adds the template to your database and makes it easily accessible from the Insert menu.

To create a new Contact template:

1. From the **Insert** menu, select **Contact from Template**. Then, select **Define Contact Template** from the submenu that appears.

The Template dialog box appears.

2. Click **New**.

The Create a New Template dialog box appears.

3. Type a name for the template and click **OK**.

The Contact Details dialog box appears.

4. Enter information into the Template, just as you would a Contact. You can also add notes and attach documents and Events.

For more information, see [“Creating Contacts” on page 29](#).

5. Click **OK**.

The template is saved to your database and appears in a submenu when you select the Contact from Template command from the Insert menu.

Creating Contacts from Templates

When you create a Contact based on a Template, the new Contact contains all the field and attachment information you've specified for that Template, including primary field settings. Any information in the new Contact can be modified, whether it's from the Template or not.

To create Contacts based on Templates:

1. From the **Insert** menu, select **Contact from Template**, then select the template name.

The Contact Details dialog box appears. The new Contact contains all the information and attachments in the template.

2. Add new information to the Contact or modify the information from the template, if necessary.

3. Click **OK**.

The new Contact appears in your Address Book.

Finding Contacts

Eudora Planner's search features let you use a variety of criteria to find Contact information in your Address Book.

The Find feature searches your Address Book for field data that you specify, then generates a list of Contacts containing that data. You can search all fields in your database at once—including all custom fields—or narrow the search by specifying that Eudora Planner search only selected fields.

The QuickFind feature lets you search for and generate a list of Contacts associated with a specific category or group of categories. The QuickFind button, which is a component of QuickFind located on the Eudora Planner toolbar, lets you do a one-click search for the contents of a single category.

The following sections describe Eudora Planner's search features.

Using the Find Feature

When you want to find a Contact in your Address Book, type a word for Eudora Planner to search for. Eudora Planner returns a list of all Contacts that contain the search word.

To search for Contact information using the Find feature:



1. From the **Edit** menu, select **Find**.

The Find Contact dialog box appears.

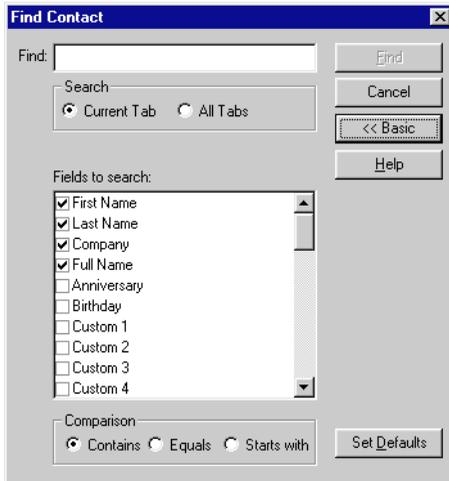
2. In the **Find** box, type the information you want to search for.
3. Select a **Search** option.

Select **Current Tab** to search only the tab that is presently forward. Select **All Tabs** to search all tabs in your Address Book.

To start the search, go to Step 7. To change the search parameters, go to Step 4.

4. Click **Advanced**.

The Find Contact dialog box expands to show more options.



5. In the **Fields to search** area, select the fields you want to search.
6. Select one of the following **Comparison** options:
 - Select **Contains** to search for Contacts that have fields with contents that contain the data you've entered into the Find box. For example, if you do a search for all Contacts containing the name "Rob," Eudora Planner will turn up records with the names "Robert" and "Robin," as well as those containing "Rob."
 - Select **Equals** to search for Contacts that have fields with contents exactly matching the data you've entered into the Find box. So, if you do a search for Contacts with the name "Rob," Eudora Planner will only find those with exactly that name.
 - Select **Starts with** to search for Contacts that have fields with a data string that starts with the text or number string you've entered into the Find box.
7. Click **OK**.

The Search Results tab appears, listing all the Contacts containing the data you searched for. See ["Saving Your Search Results" on page 71](#) for information on how to save your search results.

Using QuickFind

Eudora Planner's QuickFind feature lets you find all the Contacts associated with a particular category or group of categories.

To use QuickFind:



1. From the **Edit** menu, choose **QuickFind**.

The QuickFind dialog box appears.



*Clicking the **QuickFind** button on the Toolbar returns search results for a single category you select. If you want to search for multiple categories, you must initiate the search from the Edit menu.*

2. In the **Select Categories to look for** list, click each category that you want to find.
3. Click **OK**.

The Search Results tab appears, containing the Contacts in the categories you selected. See "[Saving Your Search Results](#)" for information on how to save your search results.



You can use QuickFind to search for any Contacts that you've added to QuickContact, which means that you can quickly scan your Quick Contacts to remove obsolete names and organizations.

Saving Your Search Results

If you want to refer later to the results of a search, you can save the Search Results tab as a new Address Book tab.

To save your search results as a new tab:

1. Click the **Search Results** tab to bring it forward.
2. Click the **Save Search Results** button in the bottom right corner of the Address Book window.

The Save Search Results dialog box appears.

3. Type a name for the tab in the **Tab Name** box.
4. To assign a category to all Contacts in the Search Results tab, click the **Category for search results** arrow, then select a category from the drop-down list. If you don't want to assign any of your existing categories, click **New Category** to create a new one.



Because tabs are based on groupings of categories, you must assign a common category to the Contacts in your search results. The category you assign here will also become the default category for the new tab. For more information about tabs, see "[Using Tabs](#)" on page 89.

5. Click **OK**.

The tab appears in your Address Book, showing any Contacts associated with the category you selected in step 4. You can modify this tab as you would any other Eudora Planner tab. For information on modifying tabs, see “[Assigning Categories to Tabs](#)” on page 96.

Finding, Viewing, and Deleting Duplicate Contacts

Eudora Planner helps you reduce clutter in your Address Book by letting you search for and delete redundant Contacts.



To search for duplicates throughout your Address Book, create a tab that contains and displays all categories.

To find, view, and delete duplicate Contacts:

1. From the **Tools** menu, select **Show Duplicates**.

The Duplicate Contacts dialog box appears, displaying the names of all Contacts that appear more than once in the current tab.



If the Show Duplicates command appears dimmed in the Tools menu, then there are no duplicates in the current tab.

2. Click the plus sign next to the name of the duplicate Contact.

A hierarchical list appears below the name, showing each instance of the Contact and the date and time it was last modified.

3. To examine a duplicate Contact, select it in the hierarchical list, then click **View**.

The Contact Detail dialog box appears. You can modify any of the Contact's information.

4. If you want to delete a duplicate Contact, select it in the hierarchical list, then click **Delete**.

The Contact is deleted from your Address Book.



The Delete option is not available to you if you select a shared Contact for which you do not have Delete permission. Consult your systems administrator to determine your permissions for items residing on a workgroup server.

5. Click **Close** to close the Duplicate Contacts dialog box.

Getting More Out of the Address Book

The following sections explain some of the advanced features of the Address Book.

Editing Contacts in the List View

You can modify or add to Contact information when it is displayed in the List View. Click to select the Contact field you want to modify, then directly type new information in the field. Eudora Planner saves your changes to the database when you click outside the field.

Duplicating Contacts

If you need to create a new Contact for someone whose personal information is nearly identical to that of an existing Contact in your Address Book, you can duplicate the existing Contact, then make the necessary changes to the duplicate.

To duplicate a Contact, select it in the List View, and then choose **Copy** from the **Edit** menu. Click anywhere in the list and select **Paste** from the **Edit** menu. The duplicate Contact will appear in the List View directly beneath the original.

Deleting Contacts



To delete a Contact, select it in the List View, then select **Delete** from the **Edit** menu. If you're using Eudora Group Planner, you cannot delete public Contacts for which you don't have delete permission.

Sorting Contacts in the List View

The Address Book List View displays your Contact information in columns that each contain a Contact field. You can assign each column a sort level. Your sorting operation applies only to the active tab.

To sort Contacts:

1. Click any column heading to select a column.
The number one (1) appears in the column heading to indicate that it is the first sort field. The Address Book sorts by this first column in descending order.
2. If you want to sort in ascending order, click the column heading again.
The column sort reverses, and the sorting icon changes.
3. To define other sort columns, hold down the Shift key and click the column headings.
Numbers appear in their column headings, indicating their level in the sort. After each click, the columns are resorted.

Moving and Resizing Columns in the List View

To reposition a column, click its heading and drag it to a position to the immediate right of the column you want it to follow. You can resize a column by dragging its borders.

Dialing Contacts

If your computer is connected to a telephone line by a modem, you can use Eudora Planner to dial the phone numbers of Contacts in your Address Book.

To communicate with your modem, Eudora Planner uses Telephony Application Programming Interface (TAPI). Any TAPI-compliant modem or device will work.

To dial a Contact:

1. In any Address Book view, find the Contact you want to call, then click the phone icon next to the number you want to dial.

The Call Details dialog box appears, containing phone information for this Contact. For details on how to add information to a Call, see [“Scheduling Calls” on page 29](#).

2. In the Call Details dialog box, click **Dial Phone**.

Your modem dials the number you’ve selected, and the Call Status dialog box appears.

3. Pick up your phone’s receiver, click **Talk**, and wait for the party you’ve dialed to answer.

If, before you pick up the receiver, you decide not to complete the call, click **Hang Up** to clear your modem and terminate the call.

The call appears as a Call Event in your calendar and in the History list of the Contact.

Faxing Contacts

Eudora Planner lets you fax attachments or Microsoft Fax-compatible files to Contacts in your Address Book. You can fax multiple documents to a single Contact, or you can send a fax to a number of Contacts in your Address Book.

To send a fax to a Contact:

1. In the List View, select the Contact to which you want to send the fax.

If you want to send a fax to more than one Contact, select the various Contacts by clicking them while pressing the Control key. Or, drag along the List View to select a contiguous group of Contacts.

2. From the **Tools** menu, select **Send Fax**.

The Send Fax dialog box appears. If you selected more than one Contact in the List View, all Contacts appear in a list.

- To have a subject and note appear on the first page of the fax, type a subject in the **Subject** box and a note in the **Note** box. If you want Eudora Planner to add to the Contact's History list a note indicating that you sent the fax, select the **Add fax event to Contact** option.
- If you want to add files to your fax, click **Browse**, then select the files you want to fax. If you want Eudora Planner to attach the files you've selected, select the **Attach files to Contact (if not already attached)** option. If you want to add files already attached to a Contact, click **Contact's Files**, then select the files you want to fax.

The names of the files you select appear in the **Files to fax** list.

E-mailing Contacts

If you use a Messaging Application Programming Interface (MAPI) compliant e-mail program, Eudora Planner can launch a new message that is pre-addressed to a Contact.

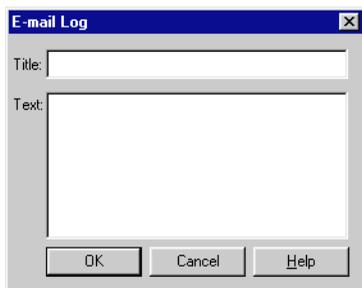
To e-mail a Contact:

- Double-click the Contact.
The Contact Details dialog box appears.
- Locate the Contact's e-mail address in a connection field, then click the mail button next to it.

Your e-mail application opens with a new, pre-addressed message addressed to your Contact.

3. Complete the body of your message, then send the message.

If you have selected the **Log e-mail sent to Contacts** check box in the Address Book Preferences (described in [“Miscellaneous Preferences” on page 82](#)), a dialog box appears that prompts you to type the title and text of a Note entry for the message to be logged in the Contact’s History list, recording the time, date, and title of the e-mail message.



Using Mail/Fax Merge

Eudora Planner’s Mail/Fax Merge feature lets you quickly and easily merge Address Book data with existing merge templates or document files created in Microsoft Word. Using Mail/Fax Merge, you can merge your Contact data into a new Word document that you can also attach to an e-mail message and send using your preferred e-mail program. Eudora Planner automates most of the merge process, so once you’ve created and saved a merge document, you need only to select the Contacts you want to merge and choose a merge destination. This feature supports Word versions 7 and 97.

To use the Mail/Fax Merge feature, you must have a template document with which to merge. You can use one of the merge templates provided for you in Eudora Planner’s Templates folder, or create your own, as described in the next section. To use the Mail/Fax Merge feature with an existing merge template, see [“Merging Address Book Data with a Merge Template” on page 77](#).

Creating a Merge Template

Creating your own merge template involves using Microsoft Word to save a Word template document that incorporates merge data from your Address Book.

To create a Word 7 or 97 merge template to use with the Mail/Fax Merge feature:

1. In Word, create or open the document you want to use as a merge template. If you’re creating a new document, type in its entire text and save it before proceeding to step 2.
2. Select **Mail Merge** from Word’s **Tools** menu and, on the Mail Merge Helper dialog box that appears, click the **Create** button and select the type of document you want to create.

Word displays another dialog box.

3. Click the **Active Window** button to specify that the open document will be used to make your template. Then, click **Close**. Save the Word document and close it.

4. In Eudora Planner, select **Mail/Fax Merge** from the **Tools** menu.

The Mail/Fax Merge dialog box appears.

5. Click **Browse** to use the Open dialog box to look for the merge template you've created in Word. Once you've located it, click **OK**.

You are returned to the Mail/Fax Merge dialog box. The template's pathname appears in the Template box.

6. Make sure the **Automatically send data to merge destination** option is not selected. Then, click **OK**.

The merge template is opened containing Eudora Planner's merge fields.

7. Insert merge fields into the template by placing the cursor where you want a field to be, clicking the **Insert Merge Field** button on the Mail Merge toolbar, and dragging in the drop-down list that appears to select a merge field. When you've inserted all the merge fields you need, save the document.

Your document is ready to be used as a mail merge template with Eudora Planner, as described in the following section.

Merging Address Book Data with a Merge Template

Once you've created a merge template, you can use it to merge your Address Book data to a selected destination.

To merge Address Book data with a merge template:

1. In the List View, select the Contacts you want to merge with the merge template. You don't need to select any Contacts if you intend to merge all those appearing in the List View.

2. From the **Tools** menu, select **Mail/Fax Merge**.

The Mail/Fax Merge dialog box appears.

3. Click the **Browse** button to use the Open dialog box to find the template with which you want to merge. Once you've located it, click **Open**.

You are returned to the Mail/Fax Merge dialog box. The pathname of the template you selected appears in the Template box.

4. In the Export section, select the **All Contacts** option if you want merge all the Contacts on the current tab. Select the **Selected Contacts** option if you want to merge only those Contacts that you've selected on the current tab.

5. In the Merge Destination box, click the arrow to select how and where you want the merge to occur:
 - Select the **New Document** option if you want to create a new Word document containing the merged data. You can view, edit, save, and print this document.
 - Select the **Printer** option if you want to print a hard copy document containing the merged data, but don't want to view or save it as a new document in Word.
 - Select the **Electronic Mail** option if you want to e-mail the merge document as an attachment to an e-mail message. The document will be attached automatically to the message.
6. Select the **Automatically send data to merge destination** option. If you want a note of the merge to be logged into each Contact's History list, select the **Add a note about the merge to the Contact** option.
7. Click **OK**.

The data from the Contacts you've selected is merged with the template at the destination you've specified in step 5.

- If you selected the New Document option, the data will be merged into a new Word document.
- If you selected the Printer option, the data will be merged into printed documents.
- If you selected the Electronic Mail option, the data is merged into a document that is attached to an e-mail message, which is in turn sent automatically by your e-mail program. The e-mail message appears with the attachment in your e-mail program's log of sent messages.

Viewing Web Sites Linked to Contacts

Eudora Planner can open a web page linked to a Contact using your favorite Web browser.

To view Contact Web sites:

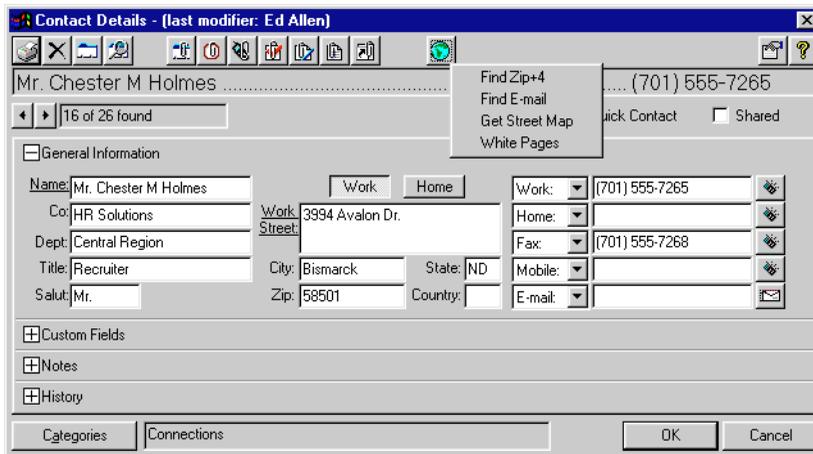
1. Double-click the Contact.

The Contact Details dialog box appears.
2. Locate the Contact's Web site name in a connection field, then click the button next to it.

Eudora Planner launches your preferred Web browser, which searches for and loads the Web page.

Using QuickNet

Eudora Planner's QuickNet feature uses the search capabilities of the World Wide Web to help you locate information about Contacts in your Address Book. QuickNet can help you find a Contact's Zip+4, e-mail address, or white pages listing—even a map to a street address. When you select a QuickNet option, Eudora Planner launches your Web browser and initiates a search based on existing data in a Contact's record.



-  To access the QuickNet menu, click the QuickNet icon in the Contact Details dialog box and select an option from the menu that appears.

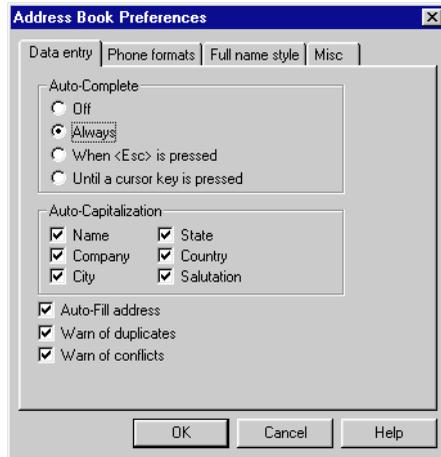
Setting Address Book Preferences

The Address Book preferences let you activate Eudora Planner's various data entry aids, choose your preferred software for faxing, and configure the contents of the Full Name field in the List View. You can change your Address Book settings by choosing **Address Book Preferences** from the **Tools** menu or by clicking the **Preferences** button in the Contact Details dialog box. Your changes take effect after you click **OK**.

The Address Book Preferences dialog box has tabs for data entry, phone formats full name styles and miscellaneous preferences, each of which are described in the following sections.

Data Entry Preferences

Data entry preferences determine the way Eudora Planner behaves when you enter Contact data into either the List View or Details dialog box.



Activate the **Auto-Complete** feature to have Eudora Planner automatically finish what you type into List View fields. When Auto-Complete is active, Eudora Planner searches your Address Book for existing data that matches the text you're typing, then completes the typing for you. The Auto-Complete feature functions in the Name, Company, and City fields.

The **Auto-Capitalization** preferences determine whether Eudora Planner automatically capitalizes the first letter of each word entered into a Contact Detail field. This feature is available for the Name, Company, City, State, Country, and Salutation fields.

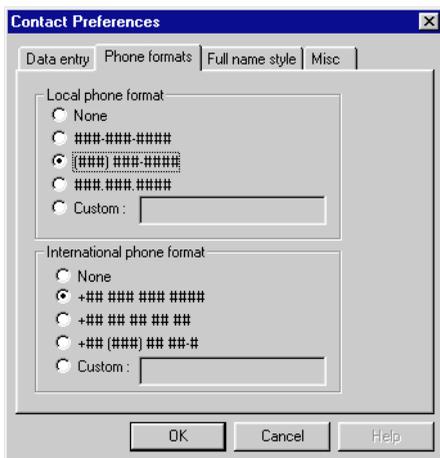
Immediately after you enter the company name for a new Contact, Eudora Planner's **Auto-Fill address** feature searches your Address Book for an existing Contact with that company name, and then fills in the new Contact's Work Address field with the contents of the existing Contact's Work Address field. Select the **Auto-Fill address** check box to enable this feature.

When the **Warn of duplicates** check box is selected, Eudora Planner will alert you when you try to save a new Contact that contains the same first name, last name, and company name as an existing one.

To have Eudora Planner alert you when you save a Contact that another user has modified simultaneously, select the **Warn of conflicts** check box.

Phone Formats Preferences

The **Local** and **International Phone Format** options let you choose whether and how domestic and international phone numbers will be automatically formatted when you enter them. If you don't want to use any of the standard options provided by Eudora Planner, you can select **Custom** to create a format to suit your needs.

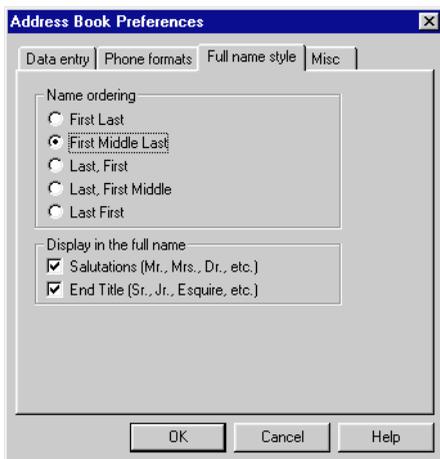


Full Name Style Preferences

The **Full Name Style** preferences determine how a Contact's name appears in the Full Name column of the List View.

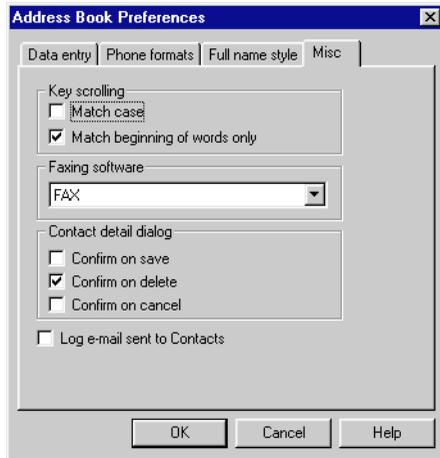
Select a **Name Ordering** option to determine the format and order of the Full Name field, as well as if the middle name appears in the full name.

The **Display in the Full Name** preferences affect whether salutations and titles appear in the Full Name column. Select the **Salutations** check box if you want the salutation field's value (such as Mr., Ms., Dr.) to appear in the Full Name column. Select the **End Title** check box if you want a title such as Jr., Esquire, M.D., etc. to appear in the Full Name column at the end of the name.



Miscellaneous Preferences

You can set preferences that affect key scrolling, faxing, the behavior of the Contact Details dialog box, and the logging of e-mail to Contacts.



Two **Key Scrolling** options determine how you can locate Contacts in the Address Book by typing their names. Selecting **Match case** makes the results of your typing case-sensitive. To have the letters you type match only the beginnings of words, and not strings of letters within a word, select **Match beginnings of words only**.

The **Faxing Software** preference determines which type of faxing software Eudora Planner uses when you send a fax to a Contact. The software you choose must be MAPI-compliant.

In the **Contact Detail Dialog** preferences area, select **Confirm on save**, **Confirm on delete**, and **Confirm on cancel** if you want Eudora Planner to prompt you to confirm your changes every time you save, delete, or cancel after adding or deleting information in the Contact Details dialog box.

To have Eudora Planner prompt you to create a log entry to be added to a Contact's History list each time you send them e-mail, select the **Log e-mail sent to Contacts** check box.

Chapter 4

Organizing Eudora Planner

Eudora Planner adds flexibility and structure to your Calendar and Address Book by letting you associate related Events and Contacts using *categories* and *tabs*.

About Categories and Tabs

By assigning a group of related Events or Contacts to the same category, you can create a relationship between them and give them a common visual style, so that you can view and manage them as a distinct group. A single Event or Contact can belong to as many categories as you need.

For example, a single Event could belong to a general Business category, a more specialized Client category, and an even more specific Project category, allowing you to view it in either a broader or more narrow context. Similarly, a single Contact could belong to a Business category, a Client category, a category for a specific Project team and one for Golf Partners, so that you can list it with other Contacts that fit the same category.

As categories help you view and manage related Events and Contacts, Tabs provide a similar way to handle related categories. You can control which categories are displayed together by creating tabs for certain, individual categories or groups of categories.

For example, to view only your work-related Events and Contacts, you could create a tab called “Work” that displays categories such as:

- A “Business” category, containing work-related Meetings, To-Dos and Contacts within your company
- A “Travel” category, containing your travel schedule and itinerary and Contacts like travel agents, hotels and airlines
- A “Financial” category, containing paydays, billing deadlines, and Contacts like banks, accountants, and creditors

By default, Eudora Planner contains a number of categories and tabs in both the Calendar and Address Book. If you have no need to divide or compartmentalize your Events and Contacts, you may find a single category and tab to be sufficient. Using categories and tabs is completely optional. As you find yourself using Eudora Planner to manage increasing amounts of Events and Contacts, however, you will find these organizational tools to be very helpful.

The following sections describe these concepts in more detail. The section immediately below describes how to use categories. tabs are discussed further in [“Using Tabs” on page 89](#).

Using Categories

Over time, as your Eudora Planner database grows, you may find it easier to manage your information by grouping your Events and Contacts into common categories. You can choose from the categories that were installed with Eudora Planner, create your own categories, or, if you're using Eudora Group Planner, select categories on a workgroup server.

When you create a new Contact or Event, it already belongs to a default category, its *primary* category. Although an Event or Contact can belong to any number of categories, it can have only one primary category, which determines how it appears in your Calendar and Address Book—the colors and fonts used to display it.

The following sections describe how to create categories, assign Events and Contacts to them, determine the primary category for Events and Contacts, and how to modify and delete categories.

Creating Categories

You can create your own categories for Events and Contacts if those installed with Eudora Planner or available on public servers aren't suitable for your purposes.

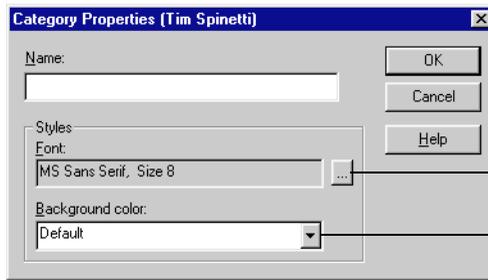
To create a category:

1. From the **Tools** menu, select **Categories**.

The Categories dialog box appears. Available categories appear in a list.

2. Click the **Server** arrow to select the server to which you want to add the category.
3. Click **New**.

The Category Properties dialog box appears.



Click to select the font, font size, and style assigned to items for which category is the primary category

Click to select the background assigned to items for which this is primary category

4. In the **Name** box, type a name for the category.
5. To give the category a distinctive appearance, click the **Font** button to open the Font dialog box. Specify Font, Font style, Size and Effects options. When you finish, click **OK**. The settings you select here will only affect Events having this category as their primary category (see [“Changing the Primary Category”](#) on page 87 for information about primary categories).
6. In the **Background Color** list, select a background color for the category. The color you select here will provide the background for Events and Contacts for which this is the primary category.
7. Click **OK**.

Eudora Planner adds the category to the Categories list.

Assigning Categories to Contacts and Events

You can organize and show relationships between Events and Contacts by assigning categories to them.

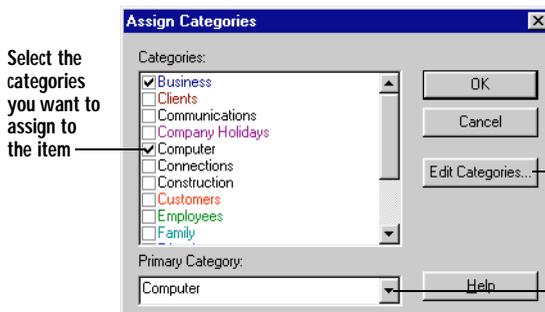
To assign categories to Events and Contacts:

1. Double-click the Event or Contact.

The Event Details or Contact Details dialog box appears.

2. Click **Categories**.

The Assign Categories dialog box appears.



Select the categories you want to assign to the item

Click to change a category's properties

Select a primary category for the item from the drop-down list

If you are connected to a workgroup server, then the server's name will appear in parentheses next to categories stored on that server.

3. In the **Categories** list, click the categories you want to assign.

A check appears next to each category you click. The first category you select becomes the primary category for the Event or Contact. You can change the primary category by clicking the **Primary Category** arrow and selecting a different category from the drop-down list.

4. Click **OK**.

The categories appear in the Categories box of the Event or Contact.

To remove a category from an Event or Contact:

1. Double-click the Event or Contact.

The Event Details or Contact Details dialog box appears.

2. Click **Categories**.

The Assign Categories dialog box appears. The categories assigned to the Event or Contact are checked.

3. In the **Categories** list, click the categories you want to remove.

The categories become unchecked.

4. Click **OK**.

The category is removed from the Event or Contact and no longer appears in the Categories box.

Eudora Planner's Address Book lets you assign a category or group of categories to multiple Contacts at one time. You can likewise remove categories.

To assign a category to multiple Contacts:

1. In the List View, select the Contacts to which you want to assign the category.

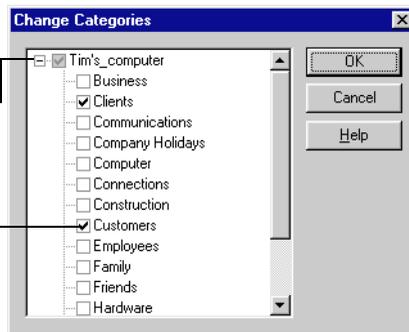
- To select all Contacts on the tab, from the **Edit** menu, choose **Select All**.
- To select a list of contiguous Contacts on the tab, click to the left of the name at the beginning of the selection, hold down the **Shift** key, then click to the left of the name at the end of the selection.
- To select a group of non-contiguous Contacts on the tab, click to the left of each name while holding down the **Control** key.

2. From the **Edit** menu, select **Change Categories**.

The Change Categories dialog box appears.

Click plus sign next to server name to view categories on that server

Check off categories you want to assign to the Contacts



3. Click the plus sign next to the server containing the category you want to assign to the Contacts, then click the check box next to the category name.
4. Click **OK**.

The categories you selected are assigned to the Contacts you selected and appear in each Contact's Details dialog box.

To remove a category from multiple Contacts:

1. In the List View, select the Contacts to which you want to assign the category.
2. From the **Edit** menu, select **Change Categories**.

The Change Categories dialog box appears.

3. Click the plus sign next to the server containing the category you want to assign to the Contacts, then click the check box next to the category you want to remove.

The check is removed from the category's check box.

4. Click **OK**.

The categories are removed from the Contacts you selected and no longer appear in each Contact's Details dialog box.

Changing the Primary Category

Although you can assign multiple categories to an Event or Contact, only one of those categories can be the primary category for that item. The primary category determines the font and background color of an Event or Contact. When you create an Event or Contact, the default category of the tab on which it was created automatically becomes its primary category. You can later change the primary category.

To change a primary category:

1. Double-click the Event or Contact.
The Event Details or Contact Details dialog box appears.
2. Click **Categories**.
The Assign Categories dialog box appears.
3. Scroll through **Primary Category** list until you find the category you want to use.
4. Click **OK**.
The category appears in the Categories box of the Event or Contact. The appearance of the Event or Contact changes to reflect the new primary category.

Editing and Deleting Categories

You can modify or delete the categories in your Calendar and Address Book, whether they're the categories installed with Eudora Planner or the ones you've created. When you rename a category, all references to that category will reflect your change.

To edit categories:

1. From the **Tools** menu, select **Categories**.
The Categories dialog box appears.
2. Click a category in the list, then click **Modify**.
The Category Properties dialog box appears, allowing you to modify the category as desired. If you want to change the font for this category, click the **Font** button and select new options in the Font dialog box. Click **OK**.
3. Click **OK**.
Events and Contacts in the category change to reflect your selections.

To delete categories:

1. From the **Tools** menu, select **Categories**.
The Categories dialog box appears.
2. Click a category in the list, then click **Delete**.
A warning dialog box appears.
3. Click **Yes** to delete the category.
The category is deleted from your Eudora Planner database and is no longer available.



You cannot delete a category from your database if it is still assigned to any of your Events or Contacts.

Using Tabs

Once you've added enough categories to your Eudora Planner database to accommodate the different kinds of Events and Contacts you create, you may find that you need to further organize your Calendar and Address Book by grouping together related or similar categories. Using tabs, you can visually group related categories for quick reference and to reduce clutter in your Calendar and Address Book views.

You can create Calendar tabs that display only those Contacts contained in a single category or those contained in any combination of categories. For example, you could make one tab called Home to display your personal Events, which are all contained in a single category called Personal. Another tab called Work could show all your work-based Events, which are contained in three categories called Marketing, Sales, and Engineering. A third, master tab could display all Events in your Calendar.

Similarly, in your Address Book you might create a tab for only those categories containing personal Contacts, another for categories containing your business associates, and yet another to show all the Contacts in your database.

This section discusses how to create tabs, how to modify their appearance, and how to assign categories to them.

When you select a style for a tab, you give it a distinctive appearance. See [“Creating Tab Styles” on page 92](#) for more information.

Creating Tabs

Create a tab when you want to visually group Events and Contacts in specific, related categories.

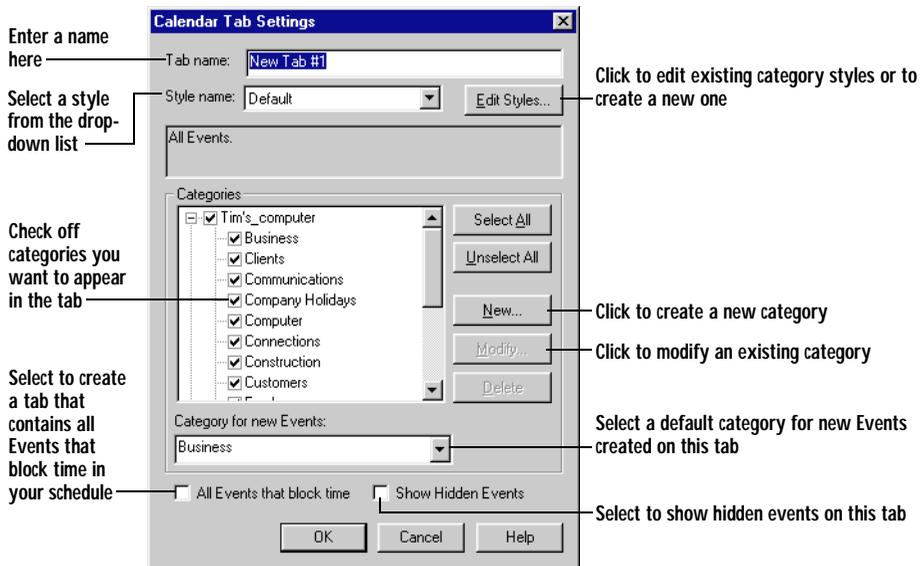
Creating Calendar Tabs

As you fill your Calendar with Events, you may want to better organize your information by creating Calendar tabs that contain selected groups of categories. You can also create a Calendar tab that shows only Events that take up time in your schedule, so you can quickly see those important activities to which you're obligated.

To create a Calendar tab:

1. In the Calendar, from the **Tabs** menu, select **Add New Tab**.

The Calendar Tab Settings dialog box appears.



You can create a new Calendar Tab by right-clicking an existing tab, then selecting **Add New Tab** from the shortcut menu that appears.

2. In the **Name** box, type a name for the tab.
 3. From the **Style Name** list, select a style, or create and assign a new style, if desired.
- For more information on creating styles for tabs, see [“Creating Tab Styles” on page 92](#).
4. In the **Category** list, select the Event categories you want to appear on the tab. To have this tab display all categories, click **Select All**.

5. Select an Event category from the **Category for new Events** list.

Click the arrow to select from the categories appearing in the drop-down list. The category you select here determines the default category for all Events you create in this tab.

6. Click **OK**.

The new tab appears in the Calendar.

To create a Calendar tab that shows only your busy time:

1. In the Calendar, from the **Tabs** menu, select **Add New Tab**.
2. In the **Name** box, type a name for the tab.

- From the **Style Name** list, select a style, or create and assign a new style, if desired.

For more information on creating styles for tabs, see [“Creating Tab Styles” on page 92](#).

- Check the **All events that block time** box.
- Click **OK**.

The new tab appears in the Calendar and contains only those Events which occupy your time.

Creating Address Book Tabs

You can organize your Contact information by creating Address Book tabs that show only selected groups of categories. When you configure an Address Book tab, you can also determine which Contact fields appear in the List View, and how those fields are sorted.

To create an Address Book tab:

- In the Address Book, from the **Tabs** menu, select **Add New Tab**.

The Address Book Tab Settings dialog box appears.

The screenshot shows the 'Address Book Tab Settings' dialog box. It has several sections:

- Tab Name:** A text box containing 'New Tab #1'. An annotation points to it with the text 'Enter a title here'.
- Style Name:** A dropdown menu set to 'default'. An annotation points to it with the text 'Click to modify an existing tab style or create a new one'.
- Categories:** A list of categories under the heading 'Any Contact from the selected servers.' with checkboxes next to them. An annotation points to the list with the text 'Select a tab style from the drop-down list'.
- Category for new Contacts:** A dropdown menu set to 'Unfiled'. An annotation points to it with the text 'Select the tab's default category from the drop-down list'.
- Columns/Sorting:** A list of fields with checkboxes. An annotation points to the list with the text 'Click here to determine the sort order of the Address Book fields on the tab'.
- Fields to display:** A list of fields with checkboxes. An annotation points to the list with the text 'Select the Address Book fields you want to appear in the List View'.



You can create a new Address Book tab by right-clicking an existing tab, then selecting **Add New Tab** from the shortcut menu that appears.

- In the **Tab Name** box, type a name for the tab.
- In the **Categories** list, select the categories you want to appear on the tab.
- In the **Category for new Contacts** list, select a category.

The category you select here determines the initial default category for all new Contacts you create in this tab.

5. From the **Style Name** list, select a style, or create and assign a new style, if desired.

For more information on creating styles for tabs, see [“Creating Tab Styles” on page 92](#).

6. Optionally, select the columns and sort order to display on this tab.
 - Click the **Columns** tab, then select the fields you want to appear in the List View of the Address Book tab.
 - Click the **Sorting** tab, then specify the default sort order of fields in the tab's List View. Choose three sorting fields, then choose either ascending or descending order for each one by clicking the Up or Down option.

These fields appear in the List View, sorted according to your selections on the Sorting tab.

7. Click **OK**.

The tab appears in your Address Book.

Creating Tab Styles

You can apply different styles to your Calendar and Address Book tabs in order to give each tab a distinct appearance. The tab style determines attributes such as fonts, colors, and the locations of items appearing on the tab.

To learn how to assign tab styles to Calendar and Address Book tabs, see the following sections.

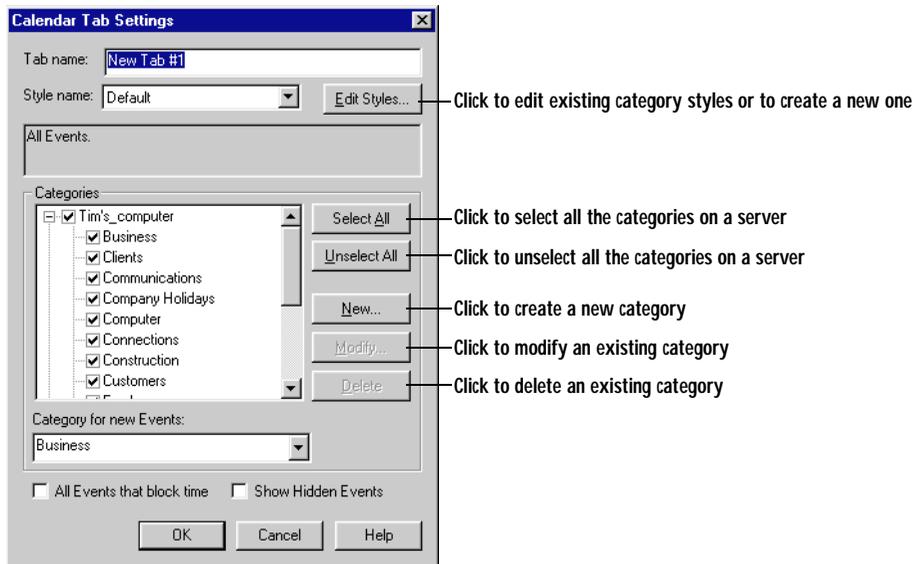
Creating Calendar Tab Styles

A Calendar tab style defines the appearance of each View on the tab—Day, Multi-Day, Month and Year—and also determines what types of Events appear on a Calendar tab and how they are displayed.

To create a new Calendar tab style:

1. In the Calendar, from the **Tabs** menu, select **Tab Settings**.

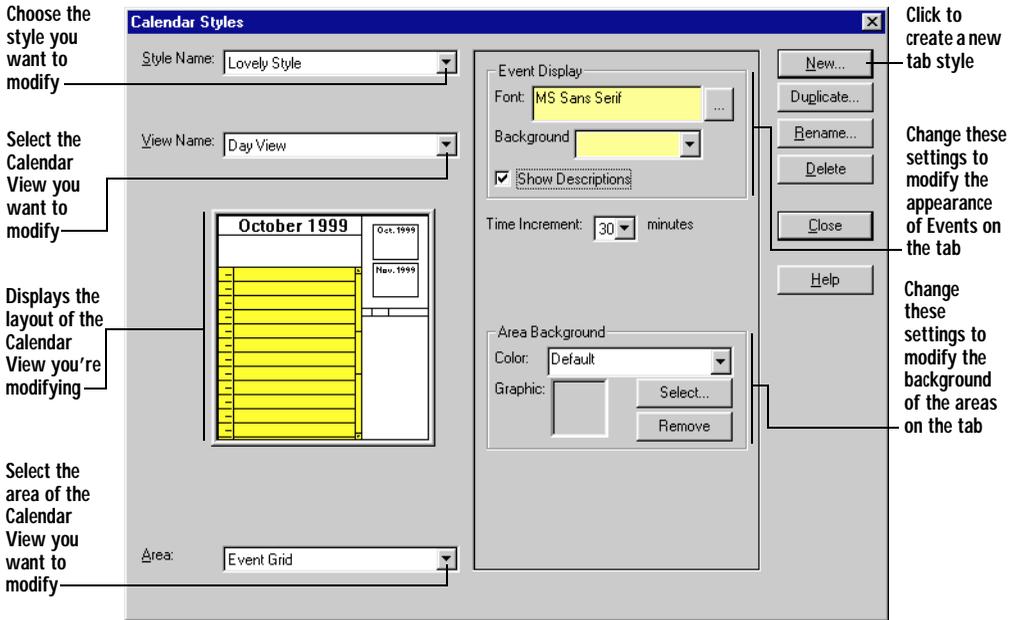
The Calendar Tab Settings dialog box appears.



*You can open the Calendar Tab Settings dialog box by right-clicking any existing tab, the selecting **Tab Settings** from the shortcut menu that appears.*

2. Click **Edit Styles**. Then, in the Calendar Styles dialog box, click **New**. Type a name for the new style in the New Style box and click **OK**.

You return to the Calendar Styles dialog box.



3. From the **View Name** list, select a Calendar View. From the **Area** list, select a section of the current View for which to specify style information.
To the right, options appear for each area of the current View.
4. Select style options as appropriate.
5. Repeat steps 3 and 4 until you have specified all styles.
6. Click **Close**.

Your new Calendar tab style appears in the Style Name list on the Calendar Styles dialog box. You can assign the style to your tabs as you prefer.

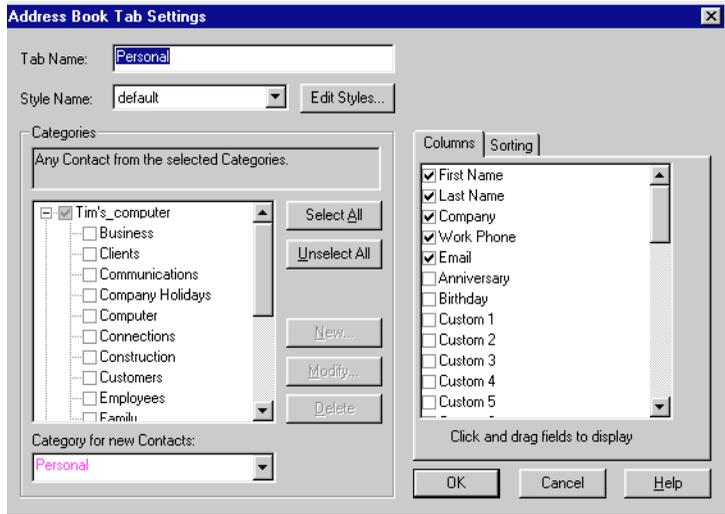
Creating Address Book Tab Styles

You can apply tab styles to Address Book tabs so that each tab has a distinct appearance. Address Book tab styles are templates that contain appearance and formatting preferences, such as which fields appear in the List View and how those fields are initially sorted.

To create an Address Book tab style:

1. Open the Address Book. From the **Tabs** menu, select **Tab Settings**.

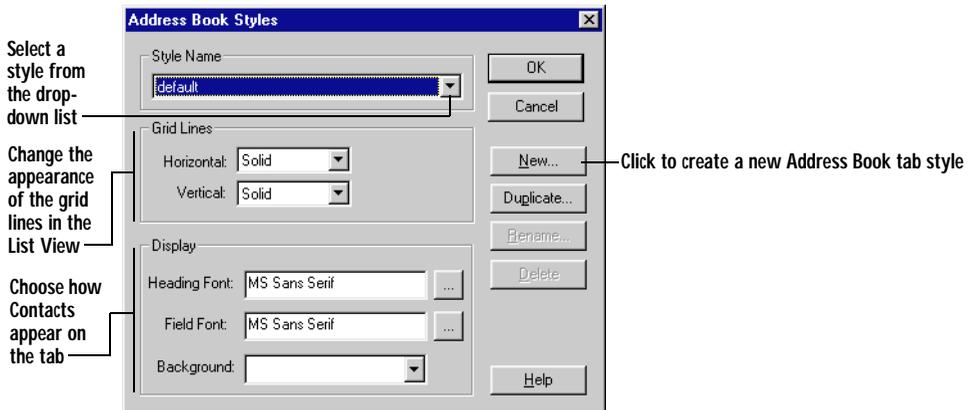
The Address Book Tab Settings dialog box appears.



You can open the Address Book Setting dialog box by right-clicking any existing tab, then selecting **Tab Settings** from the shortcut menu that appears.

2. Click **Edit Styles**. Then, on the Address Book Styles dialog box, click **New**. Type a name for the new style in the New Style box and click **OK**.

You are returned to the Address Book Styles dialog box.



3. In the **Horizontal** and **Vertical** boxes, select the style of the lines appearing in the List View.
4. In the **Display** options, click **Heading Font** and **Field Font** to select font types and font styles for the headings and field text in the List View.

5. Click **OK** to finish selecting font information, then click **OK** on the Address Book Styles dialog box.

See the following section for details on how to assign styles to Address Book tabs.

Assigning Tab Styles

If you want to change the appearance of a Calendar or Address Book tab, then assign it a different tab style.

To assign styles to tabs:

1. Click the label of the tab to bring it to the front.
2. From the **Tabs** menu, select **Tab Settings**.

The Calendar Tab Settings or Address Book Tab Settings dialog box appears.

3. From the **Style Name** list, select a new style.
4. Click **OK**.

The tab's appearance changes to reflect the new style.

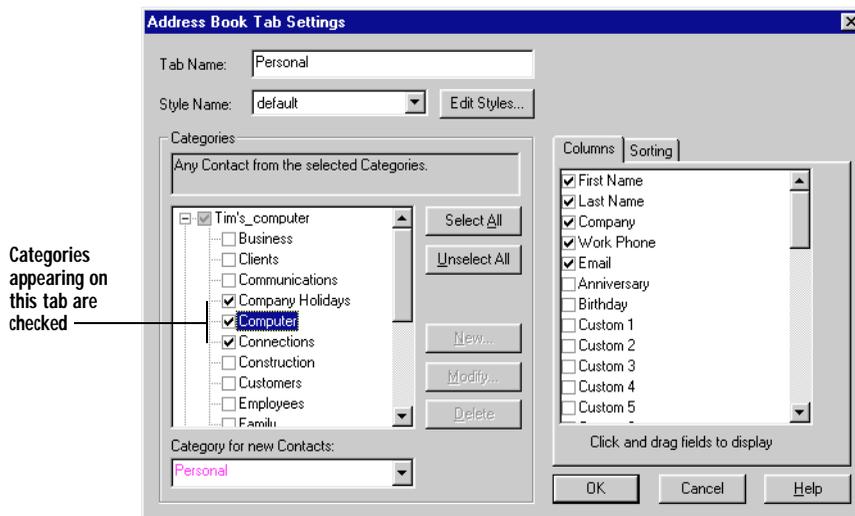
Assigning Categories to Tabs

You can determine which categories appear on Calendar and Address Book tabs.

To assign a category to a tab:

1. Click the label of the tab to bring it forward. Then, from the **Tabs** menu, select **Tab Settings**.

The Calendar Tab Settings or Address Book Tab Settings dialog box appears. A check appears next to each category displayed on the tab.



2. In the **Categories** box, click the plus sign next to the server containing the category you want to assign to the tab.

- Click the box next to the category you want to include on the tab.
A check appears next to the category you selected.
- Click **OK**.
The items associated with the category you select appear on the tab.

Adding Shortcuts

Shortcuts give you quick, one-click access to Eudora Planner plugins and other applications on your computer. The shortcuts appear in the movable shortcuts bar in the Eudora Planner window.

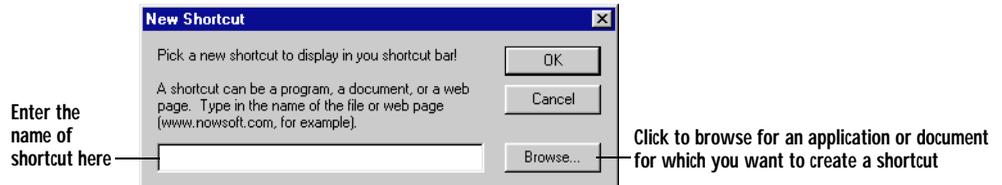


You can add a shortcut to any Windows program or file.

To add a shortcut:

- From the **View** menu, select **Add Shortcut**.

The New Shortcut dialog box appears.



- If you're creating a shortcut to a Web site, type the site's URL. If you're creating a shortcut to a file, type the file's path name or click **Browse** to open the Open dialog box.

If you clicked **Browse**, go to Step 3; otherwise, go to Step 4.

- In the Open dialog box, navigate to the file for which you want to create the shortcut, then click **Open**.
- Click **OK**.

The shortcut is saved and appears in Eudora Planner.

To rename a shortcut:

1. From the **View** menu, select **Organize Shortcuts**.

The Organize Shortcuts dialog box appears.

2. Right-click the shortcut you want to rename, then select **Rename** from the menu that appears.
3. Type a new name for the shortcut.
4. Click **Close**.

The new name appears in the shortcuts bar.

To delete a shortcut:

1. From the **View** menu, select **Organize Shortcuts**.

The Organize Shortcuts dialog box appears.

2. Select the shortcut you want to delete, then press the Delete key.

The shortcut is deleted from Eudora Planner.

Chapter 5

Printing in Eudora Planner

Eudora Planner lets you print your Calendar and Address Book information to a variety of formats, including organizers, mailing labels, and envelopes. Maintaining an appointment book or personal directory is as simple as printing pages from Eudora Planner.

This chapter describes how to print your Eudora Planner information in a variety of formats, how to create printouts from your Event and Contact information, and how to save time and ensure a consistent style and format by storing and reusing your print settings.

Selecting Print Settings

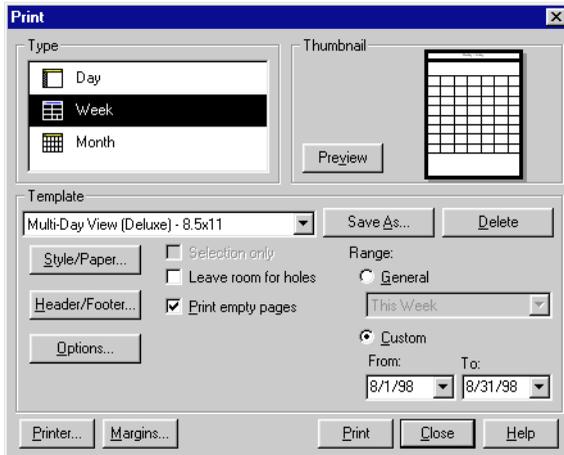
Eudora Planner lets you choose and save printing options specific to both the Calendar and Address Book. When you select the Print command from the File menu or toolbar, Eudora Planner displays a Print dialog box specific to either the Calendar or Address Book—depending on whichever is currently active. There, you can choose the format to which you want to print, as well as the contents of the print job.

If your printer supports it, you can print Eudora Planner information on both sides of the page. Or, you can print two pages of information on a single page, then fold it in half to include in an address, telephone or appointment book. Eudora Planner can print some appointment book formats as Folding pages.

After you select your printing settings, you can name and save them for reuse when you print again. To learn how to save your printing settings, see [“Saving Print Templates” on page 106](#).

Printing from the Eudora Planner Calendar

Whether you need to print pages for a personal appointment book or a simple calendar to be posted on a bulletin board, Eudora Planner provides many ways to print the information contained in your Calendar. You can print any of the Calendar views, including the To-Do List. You can print your Calendar, To-Do lists, and other Event information on standard-sized paper or pages that fit into many popular appointment books. Eudora Planner provides many different formats.



The following table describes the general options available in the Print dialog box when you print Calendar information:

| Use this option | To... |
|-----------------|---|
| Style/Paper | Select the layout of the calendar and the type paper to be used. You can choose a Paper option that allows you to print directly to formatted sheets that are inserted into a personal organizer. |
| Header/Footer | Add a custom header and footer to the printout and select a color for each. |
| Options | Select options to have additional Event information, such as notes, appear in your printouts. The settings available here vary according to the Calendar view and style you've selected. |
| Range | Select the range of Events to print. You can select a general time interval from the General drop-down list, or use the Custom option to select Events ranging between any two specific dates. |



Other options are available depending on the calendar view you have chosen. To learn what each option does, consult the online Help.

To print a calendar:

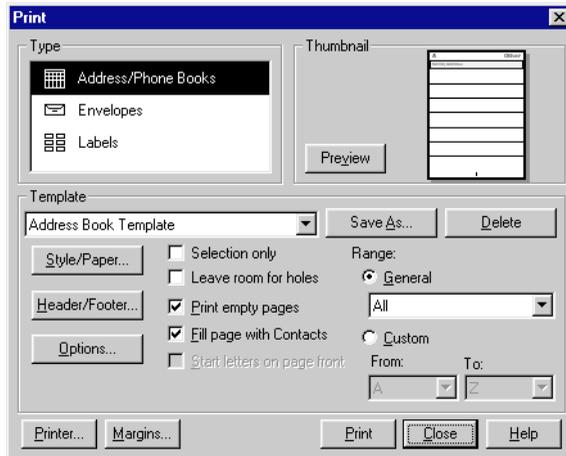


1. From the **File** menu, select **Print** to open the Print dialog box. Then, in the **Type** area, select **Day**, **Week**, or **Month**, depending on the Calendar view you want to print.
2. Click **Style/Paper** to open the Style and Paper Selector dialog box. From the **Style** drop-down list, select the layout of the printout. From the **Paper** drop-down list, select the type of paper to which you are printing.
3. If you want to add a header or footer to each page of the printout, click **Header/Footer** to open the Header/Footer Information dialog box. Enter a header and footer into the appropriate boxes and, if necessary, select colors for each. Then, click **OK**.
4. Click **Options**, then select the appropriate settings in the Style Options dialog box.
5. If necessary, choose from among the following printing options:
 - Select **Selection Only** to print only those Events you've selected on the current Tab.
 - Select **Leave room for holes** to have the printout contain margins in which you can punch holes.
 - Select **Print empty pages** to print calendar pages for months, weeks, or days containing no Events.
6. Use the **Range** options to select the range of Events you want to print.

 *If you want to use the settings you've chosen in steps 1 through 5 for future printouts, you can save them as print template. For more information on print templates, see ["Using Print Templates" on page 105](#).*
7. Click **Print**.
Your Event information is printed according to the print settings you've specified.

Printing Contact Information

You can specify how Eudora Planner prints your Contact information by entering your preferences on the Print dialog box.



After you select the type of printout you want—Address Book/Phone Book, Envelopes, or Labels/Cards—you can specify the following settings:

| Use this option | To... |
|-----------------|---|
| Style/Paper | Select the style of address book, telephone book, envelope, label, or cards to print as well as a paper, envelope, or label size. |
| Range | Select the range of Contacts to print. You can select all Contacts or select Contacts under a single letter of the alphabet from the General list. From the Custom list, you can select Contacts within the range of any two letters of the alphabet. |
| Header/Footer | Add a custom header and footer to the printout and choose a color for each. |
| Font | Select the font, font style, and font size that will appear on the printout. |
| Options | Select options for printing lines in listings, envelopes, you can enter a return address. Through Styles Options, specify color and style options for printed Contact lists. |



Other options are available depending on whether you are printing listings, envelopes or labels from the Address Book. To learn what each option does, consult the online Help.

To print an address book:



1. From the **File** menu, select **Print** to open the Print dialog box. Then, in the **Type** area, select **Address/Phone Books**.
2. Click **Style/Paper** to open the Style and Paper Selector dialog box. From the **Style** drop-down list, select the layout of the address book printout. From the **Paper** drop-down list, select the type of paper to which you want to print. Then, click **OK**.
3. If you want to add a header or footer to each page of the printout, click **Header/Footer** to open the Header/Footer Information dialog box. Enter a header and footer into the appropriate boxes and, if necessary, select colors for each. Then, click **OK**.
4. Click **Options**, then select the appropriate settings in the Style Options dialog box.
5. If necessary, choose from among the following printing options:
 - Select **Selection Only** to print only those Contacts you've selected in the current Tab.
 - Select **Leave room for holes** to have the printout contain margins in which you can punch holes.
 - Select **Print empty pages** to print empty address book pages for letters of the alphabet that have no Contacts associated with them.
 - Select **Fill page with Contacts** to fit as many Contacts as possible onto a page, rather than separating them alphabetically by page.
6. Use the **Range** options to select the range of Contacts you want to print.



If you want to use the settings you've chosen in steps 1 through 5 for future printouts, you can save them as a print template. For more information on print templates, see ["Using Print Templates" on page 105](#).

7. Click **Print**.

Your Contact information is printed in the address book format you've chosen according to the settings you've specified.

Printing Envelopes

Eudora Planner lets you print the work address of the Contacts you select, unless you specify in the Style Options dialog box that it print the home address.

To print an envelope:



1. From the **File** menu, select **Print** to open the Print dialog box. Then, in the **Type** area, select **Envelopes**.
2. Click **Style/Paper** to open the Style and Paper Selector dialog box. From the **Style** drop-down list, select the layout of the envelope printout. From the **Paper** drop-down list, select the type of envelope you will be inserting into the printer.

Then, click **OK**.

3. Click **Options**, then select the appropriate settings in Style Options dialog box.
4. Select **Selection only** if you want to print only those Contacts you've selected on the current Tab.
5. Use the **Range** options to select the range of Contacts you want to print.



If you want to use the settings you've chosen in steps 1 through 5 for future printouts, you can save them as print template. For more information on print templates, see ["Using Print Templates" on page 105](#).

6. Click **Print**.

Your Contact information is printed to envelopes according to the print settings you've specified.

Printing Labels

Eudora Planner lets you print your Contact information to a variety of label formats.

To print a set of mailing labels:



1. From the **File** menu, select **Print** to open the Print dialog box. Then, in the **Type** area, select **Labels**.
2. Click **Style/Paper** to open the Style and Paper Selector dialog box. From the **Style** drop-down list, select how you want the information to be laid out on each label. From the **Paper** drop-down list, select the label format to which you are printing. Then, click **OK**.
3. Click **Options**, then select the appropriate settings in Style Options dialog box.
4. Select **Selection Only** to print only those Contacts you've selected on the current Tab.
5. To determine how many copies of labels you want to print, enter a value into **Copies of each label** box. To determine where on the label sheet the first label should print, enter the appropriate values into the **Column** and **Row** boxes.
6. Use the **Range** options to select the range of Contacts you want to print.



If you want to use the settings you've chosen in steps 1 through 5 for future printouts, you can save them as print template. For more information on print templates, see ["Using Print Templates" on page 105](#).

7. Click **Print**.

Your Contact information is printed to labels according to the print settings you've specified.

Previewing Your Printouts

After you select the kind of output you want, Eudora Planner lets you preview your work. If you are happy with the appearance of your printed information, you can proceed to print using your default printer.

To preview a printout:



1. In the view you want to print, from the **File** menu, choose **Print**.
The Print dialog box appears.
2. If you are printing Event information, click **Day View**, **Week View** or **Month View**. If you are printing Contact information, click **Address/Phone Book**, **Envelopes** or **Labels**.
3. Select new print settings, or select your previously saved settings.
If you want to restore saved printing settings, see [“Printing from a Print Template” on page 106](#).
4. To see how the your printout will appear, click **Preview**. If further changes are required, click **Close**, then make further changes on the Print dialog box, and preview again if desired.
5. Click **Print**.
Eudora Planner prints your previewed pages using the default printer.

Using Print Templates

If you want to maintain a consistent appearance for your Eudora Planner printouts, or save time when you print new versions of your Event and Contact information, you can name and store print templates in your Eudora Planner database.

When you choose a saved print template, Eudora Planner displays all of its style and formatting information on the Print dialog box.

Saving Print Templates

If you want to reuse your printing settings, you can save them as a named template. After you save the template, you can have Eudora Planner reuse it when you want to print other Event and Contact information.

To save a print template:

1. On the Print dialog box, after you specify your desired print options, click **Save As**.

The Save Template dialog box appears.

2. Type a name for the setting in the box.
3. Click **OK**.

Eudora Planner saves the template in your database. To learn how to restore your saved settings, see the next section.

Printing from a Print Template

If you saved printing settings, you can restore them to the Print dialog box by selecting them from a list.

To restore calendar printing settings:



1. From the **File** menu, choose **Print**.

The Print dialog box appears.

2. Click **Restore Settings**.

The Restore Settings dialog box appears.

3. In the **Choose Name of Setting to Restore** list, select the name of the setting you want to use. Click **Restore Settings**.

Eudora Planner restores your settings on the Print dialog box.

Sample Printouts

The following samples are provided to give you a sense of the kind of paper calendars and address books you can create with Eudora Planner. All of the samples here can be created using a standard laser printer and 8.5x11" paper.

Month View Calendar

| August 1998 | | | | | | |
|---------------------------|---|----------------------------|--------------------------------------|----------|--|------------------------|
| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
| 2 | 3 2:30PM Call Emily Hanson | 4 | 5 11:30AM Masterson Presentation | 6 | 7 9:00AM Morning Status Meeting | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| Public Relations Seminars | | | | | | |
| 16 | 17 4:00PM Call Ms. Kaiti Noir @ (815) 555-8834 | 18 1:00PM Lunch with AI | 19 12:00AM Breakfast with Tiffany | 20 | 21 9:00AM Product Spec Meeting 9:00AM Morning Status Meeting | 22 3:00PM Call Herb |
| 23 Birthday | 24 12:30PM Marketing group | 25 | 26 5:00PM One-on-one with Tom | 27 | 28 | 29 |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |
| Vacation | | | | | | |

Week View Calendar

| 17 Monday August 1998 | <table border="1"> <tr><th colspan="7">July 1998</th></tr> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td><td></td></tr> </table> | July 1998 | | | | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | | | <table border="1"> <tr><th colspan="7">August 1998</th></tr> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td><td></td></tr> </table> | August 1998 | | | | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | | | 23 Sunday August 1998 |
|---|---|--|----------------------------|----|----|----|--|--|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|--|--|--|--|---|-------------|--|--|--|--|--|--|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|--|--|--|--|-----------------------------|
| July 1998 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 29 | 30 | 31 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| August 1998 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 29 | 30 | 31 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Monday 17 | Thursday 20 | To-Dos - 8/21/1998 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 12:00AM Breakfast with Tiffany | Priority | Title | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | <input checked="" type="checkbox"/> Normal | 9:00AM Call Mike Harris | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | <input type="checkbox"/> Normal | Plan presentation Strategy | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | <input type="checkbox"/> Normal | Pick up shirts | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tuesday 18 | Friday 21 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4:00PM Call Ms. Kaiti Noir @ (815) 555-8834 | 9:00AM Morning Status Meeting 12:00PM Lunch with new hires 3:00PM Product Spec Meeting | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Wednesday 19 | Saturday 22 | Sunday 23 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1:00PM Lunch with AI | Birthday 3:00PM Call Herb | Birthday | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Day View Calendar

| Friday, August 21, 1998 | | To-Do List | |
|-------------------------|------------------------|--|----------------------------|
| | | Priority | Title |
| | | <input checked="" type="checkbox"/> Normal | 9:00AM Call Mike Harris |
| | | <input type="checkbox"/> Normal | Plan presentation Strategy |
| | | <input type="checkbox"/> Normal | Pick up shirts |
| 8 AM | Morning Status Meeting | | |
| 9 AM | | | |
| 10 AM | | | |
| 11 AM | Lunch with new hires | | |
| 12 PM | | | |
| 1 PM | | | |
| 2 PM | Product Spec Meeting | | |
| 3 PM | | | |
| 4 PM | | | |
| 5 PM | | | |

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Address Book

| D | H |
|--|--|
| Name/Address | |
| Dempsey, Janet Middleton And Co. PR Account Manager Work: (406) 555-7655 Home: Mobile: Fax: (406) 555-7656 Email: | Work: 2525 Mabey Circle Billings MT 59102 Home: |
| Emil, Seymour Church Of Rising Expectations Founder Work: (318) 555-2334 Home: Mobile: Fax: (318) 555-4439 Email: | Work: 1254 Ascension Dr Shreveport LA 71106 Home: |
| Fisher, Ramsey Teller Tractors, Inc. Principal Work: (919) 555-9823 Home: Mobile: Fax: (919) 555-9825 Email: | Work: 8504 Puzosola Way, Suite 7 Evans NC 28339 Home: 345 Roadtop Terrace Lillington NC 27546 Email: |
| Garcia, Robert Work: Home: Mobile: Fax: Email: | Work: Home: |
| Slonky, Vicki Vark Screens, Inc. Executive Operations Principal Work: (802) 555-3462 Home: (802) 555-3292 Mobile: (802) 555-9278 Fax: (802) 555-7459 Email: | Work: 2324 Route 2 Box 6 Brattleboro VT USA 04344 Home: 14 Valley Estates Dr. Brattleboro VT USA 04344 |
| Greene, Roseann Work: Home: Mobile: Fax: Email: | Work: Home: |
| Gris, Jean-Michael West Coast Lubricants Industrial Lubricants Salesperson Work: (209) 555-7251 Home: Mobile: (209) 555-2239 Fax: (209) 555-5772 Email: | Work: 89 West Maple Way Seattle WA USA Home: |
| Holmes, Chester TR Solutions Central Region Recruiter Work: (701) 555-7265 Home: Mobile: Fax: (701) 555-7268 Email: | Work: 3904 Avalon Dr. Bismarck ND 58501 Home: |

- 2 -

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Chapter 6

QuickAccess

Now Eudora Planner's QuickAccess features give you the ability to quickly and easily view, enter, and edit Calendar and Address Book information without starting Eudora Planner. This chapter explains how to:

- Check your day's schedule and create or modify Events using QuickDay
- View, dial, e-mail, and create Contacts using QuickContact
- Create Events using QuickPad

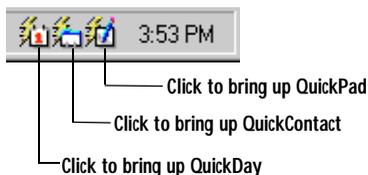
Starting QuickAccess

The three components of QuickAccess—QuickDay, QuickContact, and QuickPad—appear as icons on the Windows taskbar. If, during Eudora Planner setup, you chose not to have QuickAccess load at startup, you can start it anytime.

To start QuickAccess:

1. On the Windows taskbar, select **Start**.
2. From the **Start** menu, select **Programs**, then select **QUALCOMM** from the submenu that appears.
3. From the **QUALCOMM** submenu, select **Eudora Planner QuickAccess**.

The QuickAccess icons appear on the taskbar. You can activate QuickDay, QuickContact and QuickPad by clicking their respective icons.



Using QuickDay

You don't need to start Eudora Planner in order to see your day's schedule. QuickDay gives you the convenience of viewing today's—or any day's—activities without having to open your Calendar. Each of your Calendar Events appear in QuickDay and can be opened simply by double-clicking. You can also use QuickDay to create new Events, attach reminders, documents, or Contacts to Events, and modify any attributes of an existing Event. Any changes or additions you make in QuickDay are saved in your Eudora Planner Calendar as well.

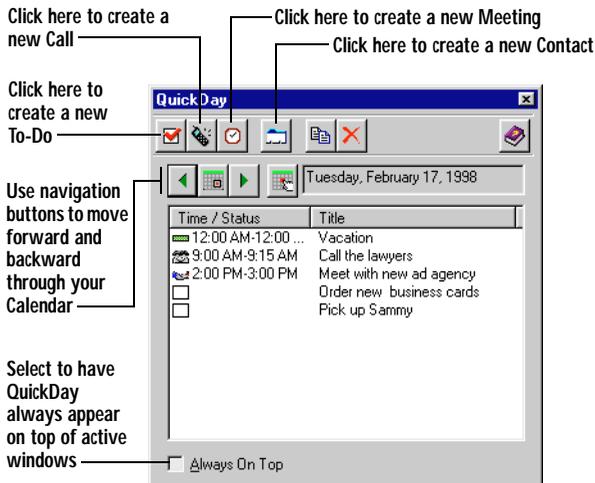
Viewing Events in QuickDay

You can use QuickDay to see any day's schedule in your Eudora Planner Calendar.

To view Events in QuickDay:

1. Click the **QuickDay** icon on the taskbar.

The QuickDay window appears, listing the current day's Events.



2. Double-click an Event in the list to see its details.

The Event Details dialog box appears.



*You can open an Event in QuickDay by right-clicking it, then select **Details** from the shortcut menu that appears.*

3. Click **OK** to return to the QuickDay dialog box.
4. Use the navigation buttons to move through your Calendar. Click the right arrow to view future Events; Click the left arrow to view past Events.

QuickDay moves forward or backward a day at a time, depending on which arrow you click.

5. Click the **Pick a date** button if you want to view Events for a particular date.
A month-view calendar appears, from which you can select a date. If you need to select a different month, click the arrows. When you click a specific date, the month-view calendar closes and QuickDay displays the Events for the date you've chosen.
6. Click the **Close** button when you finish viewing your Events.

Creating Events in QuickDay

Any Events you create in QuickDay are saved immediately to Eudora Planner, and will appear in your Calendar the next time you open it.

To create an Event in QuickDay:

1. Click the QuickDay icon in the taskbar.
The QuickDay window appears.
2. At the top of the QuickDay window, click the button for the Event type you want to create.
An Event Details dialog box appears.
3. Add the appropriate information to this Event. For details on creating Events, see [“Adding Events to the Calendar” on page 22](#).
4. Click **OK**.
You're returned to the QuickDay window. The Event is saved to your Calendar and shows in QuickDay on the appropriate day.

Modifying an Event in QuickDay

You can use QuickDay to modify an existing Event in your Calendar.

To modify an existing Event in QuickDay:

1. In the QuickDay window, double-click the Event you want to modify.
The Event Details dialog box for that Event appears.
2. Make any changes you want to the Event.
For example, you may want to change the starting time of a Meeting, attach a document to a Call, or mark a To-Do as “Complete.”
3. Click **OK**.
You're returned to the QuickDay window. The changes you've made are saved to your Calendar and also appear in QuickDay.

Creating Contacts in QuickDay

You can even use QuickDay to create Contacts for your Address Book.

To create a Contact in QuickDay:

1. In the QuickDay window, click the **New Contact** button.

The Contact Details dialog box appears.

2. In the Contact Details dialog box, enter any information appropriate for the Contact.

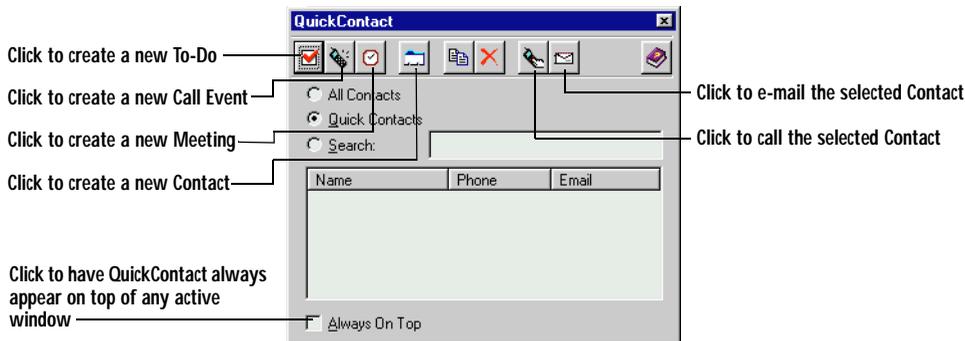
For details on creating Contacts, see [“Creating Contacts” on page 55](#).

3. Click **OK**.

You’re returned to the QuickDay window. The new Contact is saved to your Address Book.

Using QuickContact

You don’t need to have Eudora Planner open to have complete access to the Contacts in your Address Book. QuickContact lets you quickly see a list of all your Contacts, find and view those Contacts that are most important to you, dial and e-mail the people and organizations in your Address Book, and create new Contacts—all without starting Eudora Planner.



Viewing Contacts with QuickContact

QuickContact lets you see a list of all the Contacts in your Address Book, regardless of which server they reside on or the Categories assigned to them. To display a list of your Contacts, select the **All Contacts** option in the QuickContact dialog box. A list of all the people and organizations in your Address Book appears alphabetically by the first name in the primary field you’ve selected for each Contact (for details on setting primary fields, see [“Selecting Primary Fields” on page 65](#)). You can double-click a Contact in the list to open its details dialog box.

You can also create a select list of *Quick Contacts* for those Contacts you communicate with most frequently. When you select **Quick Contacts** in the QuickContact dialog box, only these Contacts appear, letting you quickly locate the Contact you need.

Making a Contact a Quick Contact

You can specify which Contacts are Quick Contacts by making a simple selection in the Contact Details dialog box.

To make a Contact a Quick Contact:

1. In the Address Book, double-click the Contact you want to add to QuickContact.
The Contact Details dialog box appears.
2. In the Contact Details dialog box, select the **QuickContact** check box.
3. Click **OK** to close the Contact.
You're returned to the QuickContact dialog box. The Contact is added to QuickContact.

Creating Contacts with QuickContact

With QuickContact, you can create new Contacts on the fly, without having to open your Address Book.

To create a Contact with QuickContact:

1. Click the **Create a new Contact** button in the QuickContact window.
The Contact Details dialog box appears.
2. In the Contact Details dialog box, enter any information appropriate for the Contact.
For information on creating Contacts, see [“Creating Contacts” on page 55](#).
3. Click **OK**.
You're returned to the QuickContact window. Your Contact is saved to the Address Book.

Finding Contacts with QuickContact

You can use QuickContact to search for Contacts in your Address Book. Once QuickContact has found a Contact, you can perform any operation on it, including dialing, sending e-mail, or opening its Details dialog box. Any changes you make to the Contact will be saved to your Address Book.

To find a Contact using QuickContact:

1. In the QuickContact dialog box, select **Search**.
2. In the **Search** box, start typing the name or company name of the Contact you are looking for.

As you type, QuickContact searches the Address Book for names and company names that match the text you are typing. Matching names appear in the QuickContact list.

3. From the list of found Contacts, select the one you searched for.

You can dial or e-mail the Contact, or open its Details dialog box to make modifications.

Dialing Contacts in QuickContact

QuickContact lets you dial Contacts in your Address Book without having to open Eudora Planner.

To dial a Contact from QuickContact:

1. Select a Contact in the QuickContact window.

The telephone number that appears is the primary phone number you set in the Contact Details dialog box. See [“Selecting Primary Fields” on page 65](#), for more details.



*You can initiate a phone call to a Contact in QuickContact by right-clicking that Contact, then selecting **Dial Phone** from the shortcut menu that appears.*

2. Click **Dial**.

The Call Details dialog box appears containing phone information for the Contact you want to dial.

3. Click **Dial Phone**.

Your modem dials the number, and a **Call Status** dialog box appears.

4. Pick up your phone's receiver, then click **Talk** and wait for the party you've dialed to answer.

If, before you pick up the receiver, you decide not to complete the call, click **Hang Up** to clear your modem and terminate the call.

E-mailing Contacts in QuickContact

With QuickContact, you can send e-mail to any Contact without opening your Address Book.

To e-mail a Contact from QuickContact:

1. In the QuickContact window, select the Contact you want to e-mail.



*You can send an e-mail to a Contact in QuickContact by right-clicking that Contact, then selecting **Send E-mail** from the shortcut menu that appears.*

2. Click the **Send e-mail to selected Contacts** button.

Creating Events with QuickContact

QuickContact lets you create Meetings, To-Dos, and Calls without having to open your Calendar. With a simple right-click, you can also create Events that attach automatically to your Contacts.

To create Events with QuickContact:

1. At the top of the QuickContact window, click the button for the Event type you want to create.

An Event Details dialog box appears.

2. Add the appropriate information to this Event.

For details on creating Events, see [“Adding Events to the Calendar” on page 22](#).

3. Click **OK**.

You’re returned to the QuickContact window and the Event is saved to your Calendar.

To create an Event that attaches automatically to a Contact:

1. Right-click the Contact to which you want to attach the Event.

A shortcut menu appears.

2. From the shortcut menu, select the type of Event you want to attach to the Contact.

An Event Details dialog box for the type of Event you’ve selected appears.

3. Enter the appropriate information for the Event. For details on how to create Events, see [“Adding Events to the Calendar” on page 22](#).

4. Once you’ve entered the information, click **OK**.

The Event is saved to your Calendar, and also appears in the Contact’s History list.

Using QuickPad

QuickPad is a convenient taskbar menu that lets you create To-Dos, Calls, Meetings, and Contacts on the fly.

To create an Event or Contact using QuickPad:

1. Click the QuickPad icon on the taskbar.

A pop-up menu appears.

2. From the pop-up menu, select the Event type you want to create or select **New Contact**.

An Event or Contact Details dialog box appears, or, if you selected Meeting Wizard from the pop-up menu, then the Meeting Wizard appears.

3. In the Event or Contact Details dialog box, add any appropriate information.
For information on creating Events, see [“Adding Events to the Calendar” on page 22](#). For information on creating Contacts, see [“Creating Contacts” on page 55](#).
4. Click **OK** to close the Event or Contact.

The item is saved to your Eudora Planner Calendar or Address Book.

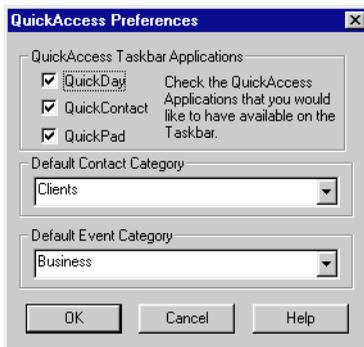
Setting QuickAccess Preferences

Eudora Planner lets you choose which of the three QuickAccess icons appear on the Windows taskbar. You can also select the default Categories for any Contacts and Events you create with a QuickAccess component.

To display or hide a QuickAccess icon:

1. Right-click one of the QuickAccess icons on the taskbar.
A pop-up menu appears.
2. From the pop-up menu, select **Preferences**.

The QuickAccess Preferences dialog box appears.



3. Check the QuickAccess components that you want to appear on the taskbar. Uncheck those you don't want to appear.
4. Click **OK**.

Your preferences settings are saved. Only those QuickAccess components you've selected appear in the taskbar.

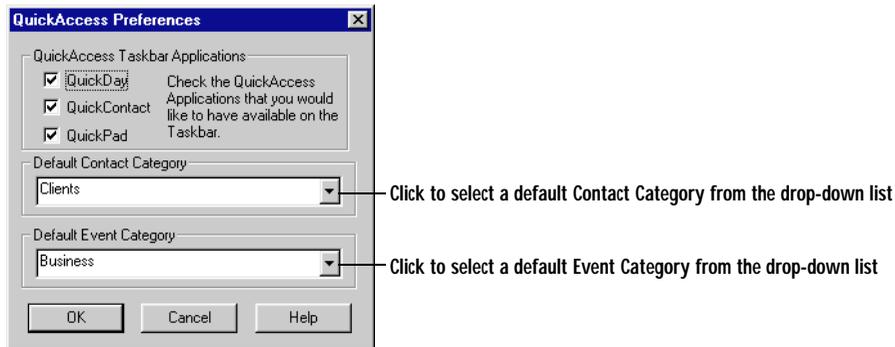
To select default Categories for Contacts you create with QuickAccess:

1. Right-click one of the QuickAccess components on the taskbar.

A pop-up menu appears.

2. From the pop-up menu, select **Preferences**.

The QuickAccess Preferences dialog box appears.



3. To select a default Category for Contacts, click the arrow in the **Default Contact Category** box, then choose a Category from the drop-down list that appears.
4. To select a default Category for Events, click the arrow in the **Default Event Category** box, then choose a Category from the drop-down list that appears.
5. Click **OK**.

The Categories you've selected are the defaults for Contacts and Events you create with any QuickAccess component.

Starting Eudora Planner from QuickAccess

With one click, you can use QuickAccess to start Eudora Planner from the taskbar. Right-click any of the QuickAccess icons on the taskbar, then select **Start Eudora Planner** from the shortcut menu that appears.

Closing QuickAccess

It's easy to close QuickAccess if you no longer want it to appear on your taskbar.

To close QuickAccess:

1. On the taskbar, right-click one of the QuickAccess icons.

A pop-up menu appears.

2. From the pop-up menu, select **Close QuickAccess**.

The QuickAccess icons disappear from the taskbar, indicating that QuickAccess is no longer running.

Chapter 7

Using Eudora Group Planner

Eudora Group Planner is a workgroup version of Eudora Planner that lets you share Calendar and Address Book information, coordinate meetings and office resources with co-workers, and view the schedules of other users. This chapter describes Eudora Group Planner, including how to

- Log in to a Eudora Group Planner server and select a server to track your available time for group scheduling
- View and create Events and Contacts that are shared among users in your workgroup
- Schedule meetings with your co-workers
- Understand your permissions for a workgroup server and protect your shared Events and Contacts using Eudora Group Planner's security features

Using Eudora Planner in a Workgroup

Before you can begin to share Calendar and Address Book information and schedule meetings with other Eudora Planner users, you must first connect to a *workgroup server*. Your Eudora Planner administrator creates the workgroup server and determines the level of access granted to you and other users. There can be one or more workgroup servers available on your network, each containing such information as

- User names, passwords, and information about users' access permissions
- Information necessary for scheduling meetings, such as conference rooms, meeting resources, and a running log of other users' availability
- Public categories for use in sharing Events and Contacts

When you connect to a workgroup server, you can subscribe to categories of Events and Contacts that reside on that server. Categories residing on a workgroup server

are referred to in Eudora Planner as *public* categories. You can create new public categories on a workgroup server if you have been given permission to do so. Other users connected to the same server and granted the proper permissions can view and add information to the public categories you create.

The Eudora Group Planner Administrator

In your workgroup, there should be an individual who serves as the Eudora Planner administrator. This person should be familiar enough with your organization's structure, computers, and network to effectively install and maintain the Eudora Planner servers, as well as to set up each Eudora Planner user, or group of users, with access permissions that are appropriate to their role in your organization.

The Eudora Planner administrator can more easily manage the access permissions of similar individual users by putting those users into *groups*. As a Eudora Planner user, you should be aware of any groups to which you are assigned, because access permissions assigned to those groups affect your individual security profile. See [“Knowing Your Security Permissions for a Workgroup Server” on page 135](#) for more information.

The steps involved in setting up a Eudora Group Planner installation are discussed in the *Eudora Group Planner Administrator's Guide*, which is included with the Eudora Group Planner software package. This book also describes the issues related to administering a group of Eudora Group Planner users.

See your Eudora Planner administrator for information on which workgroup servers you can access and the permissions you will have for data on those servers.

Logging in to a Workgroup Server

The first step in sharing Events and Contacts with other Eudora Planner users is to log in to a workgroup server. Eudora Planner's Server Wizard makes it easy to log in to a workgroup server by guiding you through the connection process.

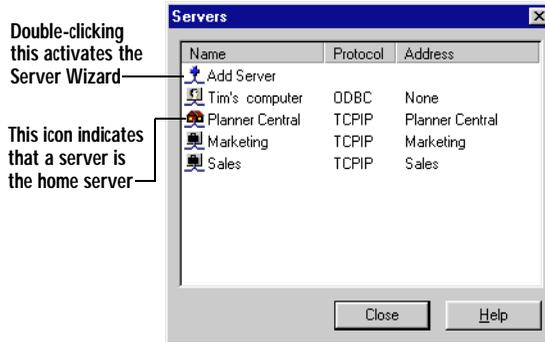


To log in to a workgroup server, you must know either the server's IP address, fully-qualified domain name, or Windows computer name. You must also know your own user name and password (if any) for that server. Contact your Eudora Planner administrator if you are unsure how to identify a workgroup server or if you don't know your user information.

To log in to a workgroup server:

1. From the **Tools** menu, select **Servers**.

The Servers dialog box appears.



2. In the Servers dialog box, double-click **Add Server**.

The Server Wizard appears.



3. Follow the Wizard's instructions to connect to a server.

When finished, you are logged in to the Eudora Planner workgroup server and can view and create Events, Contacts, categories and custom fields for this server, if the Eudora Planner administrator has granted you permissions to do so. If you've chosen to make this server your home server, it now tracks the times you're available or unavailable for group scheduling.

Selecting a Home Server

To use Eudora Planner for group scheduling, you must select a *home server* from the workgroup servers available on your network. The home server tracks your *busy time*—the time in your schedule already occupied by Events—and displays that information to other Eudora Planner users when they invite you to meetings. For more information about busy time, see [“Showing Your Time as Busy” on page 132](#).

If there is only one Eudora Planner server on your network, you must still designate it as your home server. However, if there are multiple Eudora Planner servers available, you should consult your Eudora Planner administrator before selecting one as a home server.

Eudora Planner's Server Wizard prompts you to select a workgroup server as your home server when you initially log in to that server, but you can always change your home server.

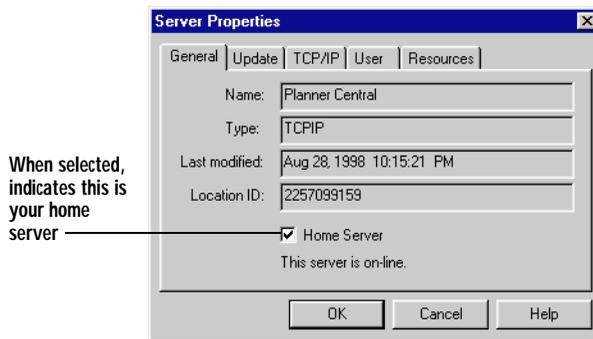
To change your home server:

1. From the **Tools** menu, select **Servers**.

The Servers dialog box appears, displaying a list of servers to which you are connected.

2. Double-click the server you want to be your home server.

The Server Properties dialog box appears.



3. In the **General** tab, select **Home Server**.

4. Click **OK**.

The server you select becomes your home server and records your meeting availability.



*In the Servers dialog box, you can right-click the server you want to make the home server, then select **Home Server** from the shortcut menu that appears.*

Setting Server Update Preferences

Eudora Planner lets you specify how often your database receives updated information from a workgroup server. You can also force your database to receive an immediate update from a workgroup server at any time.

To set the server update frequency:

1. From the **Tools** menu, select **Servers**.

The Servers dialog box appears, listing all the servers to which you are connected.

2. Double-click the server for which you wish to change the update frequency.
The Server Properties dialog box appears.



*You can right-click the icon for the server, then select **Properties** from the shortcut menu that appears.*

3. Click the **Update** tab.
4. In the **Update Frequency** box, type the time interval between updates from the server.
5. Click **OK**.

Your Eudora Planner database will receive updates from the workgroup server at the interval you've specified.

To force an immediate update from the server:

1. From the **Tools** menu, select **Servers**.

The Servers dialog box appears, listing all the servers to which you are connected.

2. Double-click the server from which you want an update.

The Server Properties dialog box appears.

3. Click **Update Now**.

The server immediately updates your Eudora Planner database with any changes or additions that other users have made since your last update.



*You can force an update from a server by right-clicking the server's icon in the Servers dialog box, then selecting **Update Now** from the shortcut menu that appears.*

Sharing Eudora Planner Information with Others

Whether your workgroup consists of your whole company, one department, or just you and your assistant, the ability to distribute accurate scheduling and contact information may be vital to the efficiency of your organization. Eudora Group Planner lets you and your co-workers keep each other informed about events, personal and departmental calendars, and data concerning important customers and clients.

This section describes how to view other users' shared Events and Contacts and how to share the items you create. It also explains how to create public categories and custom fields.

Viewing and Creating Shared Events and Contacts

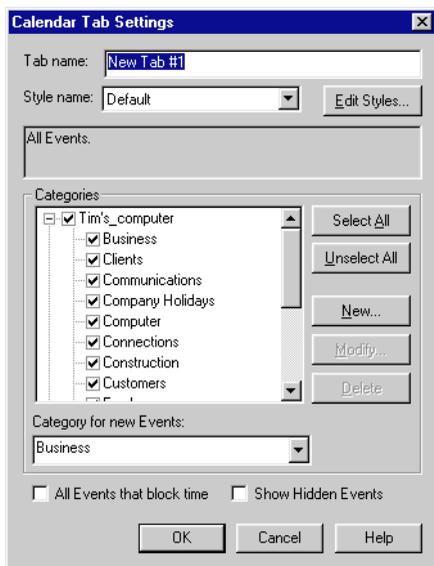
To view the Events and Contacts that other users add to a Eudora Group Planner server, you must create a tab that subscribes to public categories residing on that server. Also, if you configure the tab to have one of those public categories as its default category, then you can also use the tab to conveniently create your own shared Events and Contacts. Any Event or Contact created on such a tab automatically acquires that public category as its primary category, and is therefore shared with other users connected to the server containing that category.

 *To add Events and Contacts to a workgroup server, you must have Create permission for that server. Consult your Eudora Planner administrator to determine if you have this permission for Events and Contacts.*

To create a tab on which you can view and create shared Events and Contacts:

1. In either the Calendar or Address Book, select **Add New Tab** from the **Tabs** menu.

The Tab Settings dialog box appears. Although the pictures below are specific to creating Calendar tabs, you can use this procedure to add public categories to an Address Book tab as well. For more details on configuring tabs, see [“Creating Calendar Tabs” on page 89](#) and [“Creating Address Book Tabs” on page 91](#).



2. In the **Tab Name** field, enter a name for the tab.

- In the **Categories** area, select a workgroup server. Then, select the public categories you want to appear on the tab. If necessary, select a default category from the **Category for new Events** or **Category for new Contacts** drop-down list. The default should be a public category if you plan to use this tab to create shared Events or Contacts.

Select a workgroup server —

Public categories appearing on the tab are selected —

From the drop-down list, you can select a public category to be the default category for items created on this tab —

- Select a default category from the **Category for new Events** or **Category for new Contacts** drop-down list.
- Click **OK**.

The tab appears in your Calendar or Address Book view and displays items in the public categories you selected.

Tab containing public categories appears in view —

Shared items appear in tab —

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|--------------------------------------|----------|---|-----|--------------------------------------|----------------------------------|
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 1:30 PM Call Emily Hanson | 3 | 10:30 AM Masterson Presentation | 4 | 8:00 AM Morning status meeting | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | Public relations seminars | | | |
| 16 | 10:30 AM Marketing group | 17 | 3:00 PM Call Ms. Kali Noir @ (815) 555-9834 | 18 | 12:00 PM Lunch with Al | 19 |
| 20 | 7:00 AM Breakfast with Tiffany | 21 | 8:00 AM Morning status meeting | 22 | 12:00 PM | Birthday 2:00 PM Call Herb |
| 23 | 3:00 PM Marketing group | 24 | 4:00 PM One-on-one with Tom | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | Vacation | | | | |

Any Event or Contact you create on this tab acquires the tab's default category as its primary category. For information on how to change the primary category of an Event or Contact, see [“Changing the Primary Category” on page 87](#).

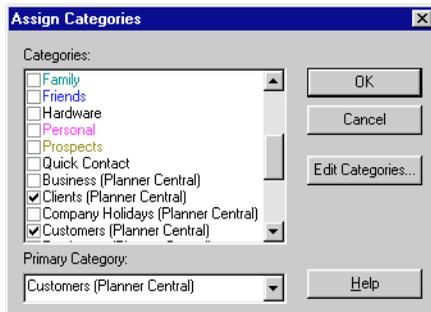
Sharing Existing Events and Contacts

Even if an existing Event or Contact is presently residing on a tab that contains no public categories, you can still share it with your workgroup.

To share an existing Event or Contact:

1. Double-click the Event or Contact to open its Details dialog box.
2. Select the **Shared** check box.
3. Click the **Categories** button.

The Assign Categories dialog box appears. In this dialog box, public category names are followed by names of the servers they reside on, which appear in parentheses.



4. Select the public categories you want to assign to this Event or Contact. If necessary, select a primary category for the item.
5. Click **OK**.

The Event or Contact is assigned the public category and becomes available to other users subscribing to that category.

To share multiple Contacts or move multiple shared Contacts from one server to another:

1. In the List View, select the Contacts you want to share.
2. From the **Edit** menu, select **Sharing**.

The Contact Sharing dialog box appears.

3. Click the arrow to select the server to which you want to move the Contacts.

The Contacts are moved to the server you've selected and become available to other users logged in to that server. If you're moving personal Contacts to a server, then the primary categories of those Contacts will be created on the server to which you're moving the Contacts.

Creating Categories for a Workgroup Server

A Eudora Group Planner server usually contains a number of categories installed with the program, plus any categories created by the Eudora Planner administrator and other users. If you find that none of these categories suit your needs, you can create your own public categories to reside on that server. These categories can be used by any Eudora Planner users with permissions to create Events and Contacts on that server.

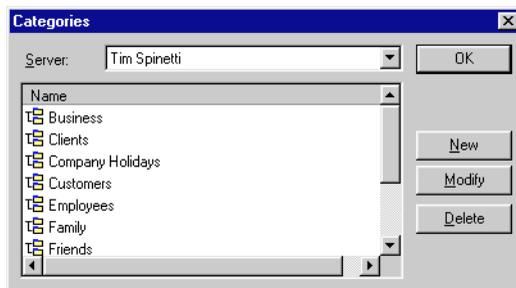


To create a category for a workgroup server, you must have Create permission for that server. Consult your Eudora Planner administrator to determine if you have this permission for categories.

To create a category for a workgroup server:

1. From the **Tools** menu, select **Categories**.

The Categories dialog box appears.

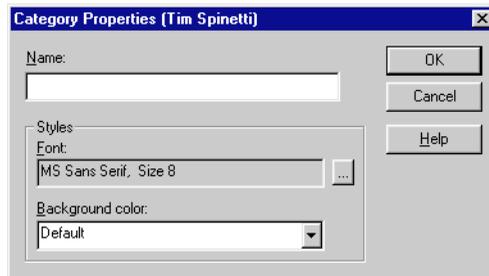


2. Click the arrow in the **Server** box.

A drop-down list of available servers appears.

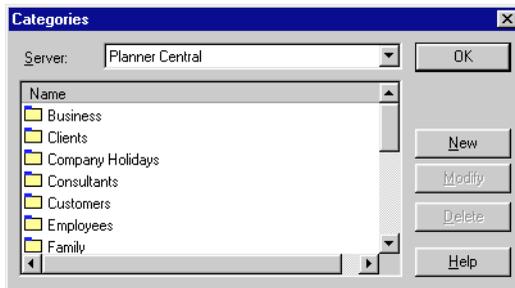
3. From the drop-down list, select the server to which you want to add the category.
4. Click the **New** button.

The Category Properties dialog box appears.

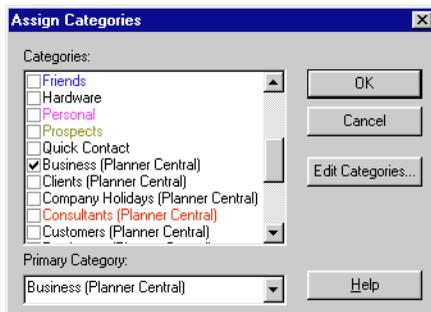


5. Type a name for the category in the **Name** box.
6. Change the font and background color, if necessary.
7. Click **OK**.

The category is added to the workgroup server and appears in the Categories dialog box when you select that server from the **Server** drop-down list.



The category also appears in the Assign Categories dialog box, which appears when you click the **Categories** button in the Event or Contact Details dialog box.



*In order for public categories to appear in the Assign Categories dialog box, you must select the **Shared** option in the Event or Contact Details dialog box before you click the **Categories** button, as described in the previous section, “[Sharing Existing Events and Contacts](#)” on page 126.*

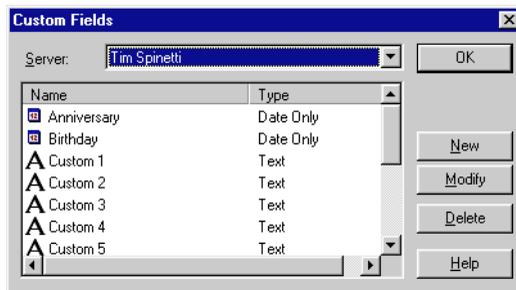
Creating Custom Fields for a Workgroup Server

You can make a custom field available to other Eudora Planner users by placing it on a workgroup server. The custom field appears in any Contacts that have been assigned categories that reside on that server.

To create a custom field for a workgroup server:

1. From the **Tools** menu, select **Custom Fields**.

The Custom Fields dialog box appears.



2. Click the arrow in the **Server** box.

A drop-down list of available servers appears.

3. From the drop-down list, select the server to which you want to add the custom field.



In order to create a custom field for a server, you must have Create permission for that server. Consult your server administrator to determine if you have this permission.

4. Click **New**.

The Custom Field Properties dialog box appears.

5. Type a name for the custom field in the **Name** box.
6. Select a field type for the custom field. For more information about field types, see [“Using Custom Fields” on page 57](#).
7. Click **OK** to close the Custom Field Properties dialog box, then click **OK** to close the Custom Fields dialog box.

The custom field is saved to the workgroup server and appears in any Contact stored on that server.

Using Group Scheduling

Most meetings require coordinating people’s schedules with the availability of meeting rooms and office equipment. Eudora Planner’s *group scheduling* feature can track this information for you, making it easy to determine the best time for your meeting. Then, when you invite other users to attend, Eudora Planner notifies them, allowing them to confirm or decline your invitation.

The first step in group scheduling is to create a Meeting Event. For details, see [“Using Meeting Events” on page 23](#). Once you’ve created a Meeting, continue with the following section to add group scheduling information to that Event.

Scheduling Users, Rooms, and Resources for Meetings

Eudora Planner's group scheduling feature lets you use Meeting Events to determine the availability of users and resources, send a network invitation to meeting invitees, and reserve a conference room.

To schedule users, rooms, and resources for a Meeting:

1. Double-click the Meeting Event to open the Meeting Details dialog box. Then, click the **Group Scheduling** tab.

Your name automatically appears in the invitee list when you create a Meeting

Thin bar indicates your blocked time

Thick bar indicates range of time for which Meeting is scheduled

| name | req | opt | rsvp | Thursday, August 20, 1998 | | | | | | |
|--------------|-----|-----|------|---------------------------|------|------|-----|-----|-----|-----|
| | | | | 10am | 11am | 12pm | 1pm | 2pm | 3pm | 4pm |
| Tim Spinetti | req | | ✓ | | | | | | | |



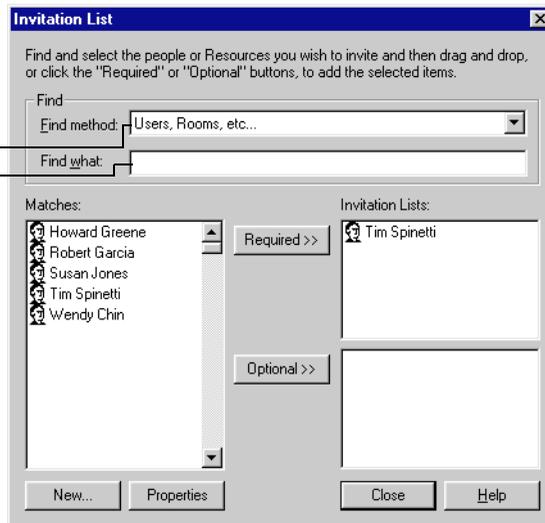
You can open a Meeting by right-clicking it in any Calendar View, then selecting **Details** from the shortcut menu that appears.

2. Click the **Invite Others** button.

The **Invitation List** dialog box appears.

Drop-down list lets you choose invitees from users and resources available on the network or from Contacts in your Address Book

Typing here lets you locate invitees of the type you've selected above



3. If you need to invite a someone other than a user or resource defined in Eudora planner, click the **Find Method** arrow. You can have it display all Eudora Planner users and resources, all Contacts or Quick Contacts in your Address Book, or specific Contacts you search for.

If you select **Users, Rooms, etc.**, all Eudora Planner users and resource that are available to you are listed in the **Matches** list

If you select the **Find Contacts** option, type the name of the Contact you are searching for into the **Find What** box. As you type, search results appear in the **Matches** list.

If you select **Quick Contacts** or **All Contacts**, all Contacts or Quick Contacts in your Address Book are listed in the **Matches** list.

4. To invite a user to the Meeting, select his or her name in the **Matches** list. Click the **Required** button if he or she is required to attend the Meeting; click the **Optional** button if his or her attendance is optional.
5. Click **Close** to return to the Group Scheduling tab.

The invitees appear in the invitation list along with time grids representing their schedules. Empty cells in the time grid indicate periods when a user is available. A yellow bar in the grid indicates a user's busy time. The vertical bar spanning all invitees' time grids shows the time range of the Meeting you're scheduling.



If a user's time grid indicates that another Event conflicts with the meeting you're scheduling, you can view the conflicting Event by right-clicking the yellow bar in the time grid, then selecting the Event name from the pop-up menu. The Details dialog box for the Event appears.

6. Check the invitation list to see if any of your invitees have Events scheduled that conflict with this meeting. If necessary, you can drag the time range for the Meeting (in green) to a time when more people or resources are available. Or, to have Eudora Planner find a better time for you, click **Auto-Pick**; Eudora Planner attempts to find the first block of time that is free for all the people and resources in the invitation list, using the duration selected in the **Duration** list.
7. On the **Meeting** tab, change the duration of the meeting in the **Duration** box, if necessary.
8. Click **OK**.

The Meeting is immediately sent to the workgroup server so that the invitees receive their Meeting invitations.

Showing Your Time as Busy

When you use Eudora Planner for group scheduling, you can make particular Events show your time as busy, so other users can know when you're unavailable for meetings. When you accept a meeting invitation, Eudora Planner shows your time as busy during the time for which the meeting is scheduled.

You can have any type of Event show your time as busy. To have an Event occupy your time, double-click the Event to open its Details dialog box, then click the **Show Time as Busy** checkbox. Then, click **OK**. When another user tries to invite you to a Meeting that runs concurrently with the Event, the user will see that you are unavailable at that time.



You can see the Events that occupy your time by creating a tab that shows only your busy time. For details, see [“Creating Calendar Tabs” on page 89](#).

Using the Proxy Feature

Eudora Planner's proxy feature lets you designate other user as your *proxy*. When you designate another user as your proxy, that user can answer meeting invitations on your behalf. The proxy feature is especially useful for a secretary or administrative assistant who is responsible for maintaining a manager's schedule.

To make another user your proxy:

1. From the **Tools** menu, select **Users and Groups**.
The Users and Groups dialog box appears.
2. Use the **Server** drop-down list to select the server for which you want to set a proxy.
3. In the **Users and Groups** list, select the entry for yourself, then click the **Details** button.
The User Properties dialog box appears.
4. Click the **Proxies** tab.

5. In the **All users** list, click the user that you want to add as your proxy, then click the **Add** button to place that user in the Proxy users list. Repeat this step as necessary if you want to add additional proxies.
6. Click **OK** to close the User Properties dialog box.
7. Click **OK** again to close the Users and Groups dialog box.

The users you selected can now function as your proxy on the server you selected.



If you have administrative privileges, you can assign proxies for other users in this way. Just select the user you want to assign a proxy for in step 3.

To proxy for another user:

1. From the **File** menu, select **Login**.

The Eudora Planner Login dialog box appears.

2. Select the **Act as someone else** check box.
3. Use the **Act as** drop-down list to select the user for whom you are to act as a proxy.
4. Click **OK**.

The name of the user for whom you are proxying appears in the user name box in the bottom right corner of the Eudora Planner window. You can now create Events and answer meeting invitations on behalf of this user. When you're finished, return to the Login dialog box as described in step 1 to log in as yourself again.

Understanding Eudora Planner's Workgroup Security Features

Eudora Planner's workgroup security features are designed to operate on three levels: that of the server, the user, and a particular Event or Contact.

The permissions assigned at the server level are referred to in Eudora Planner as *security* permissions. Security permissions are granted to you by your Eudora Planner administrator and determine your general level of access to items on a workgroup server. The security permissions assigned to groups to which you belong also affect your access to a workgroup server. For more information on security permissions, see ["Knowing Your Security Permissions for a Workgroup Server" on page 135](#).

Permissions assigned at the user level are referred to as *privacy* permissions. Privacy permissions are those permissions you grant to other users for your shared Events and Contacts. For information on privacy permissions, see ["Setting Privacy Permissions" on page 138](#).

Permissions assigned at the Event or Contact level are referred to as *object* permissions. Object permissions are those permissions you assign to other users

for a specific shared Event or Contact that you've created. For information on object permissions, see [“Setting Object Permissions” on page 140](#).

The three types of permissions affect you both as an individual user and as a member of a group. The following section explains how.

Users and Groups in Eudora Planner

Before you can log in to a particular workgroup server, your Eudora Planner administrator must create a user account for you on that server. This user account consists of your user name and login password, the groups to which you belong, and your security profile—that is, the permissions you have for accessing, altering, and creating information and resources on the server. The Server Wizard prompts you to enter your user name and password when you first log in to a Eudora Group Planner server, so you should obtain this information from your administrator before you attempt to connect. Once you've connected, you can view other information about your user account.

In addition to setting up users, your Eudora Planner administrator may also set up *groups* on the server in order to more easily manage users' permissions. A group consists of a number of individual users on a server—usually a cluster of individuals who work in the same department or share the same level of managerial responsibility. Just as for a user, the Eudora Planner administrator also sets up a security profile for a group, granting it specific permissions for the server while denying it other permissions. The permissions for a group become part of the security profile of a user in that group, and in most cases take precedence over the individual user's profile. For information on how a group membership affects a user's security profile, see [“Knowing Your Security Permissions for a Workgroup Server” on page 135](#).

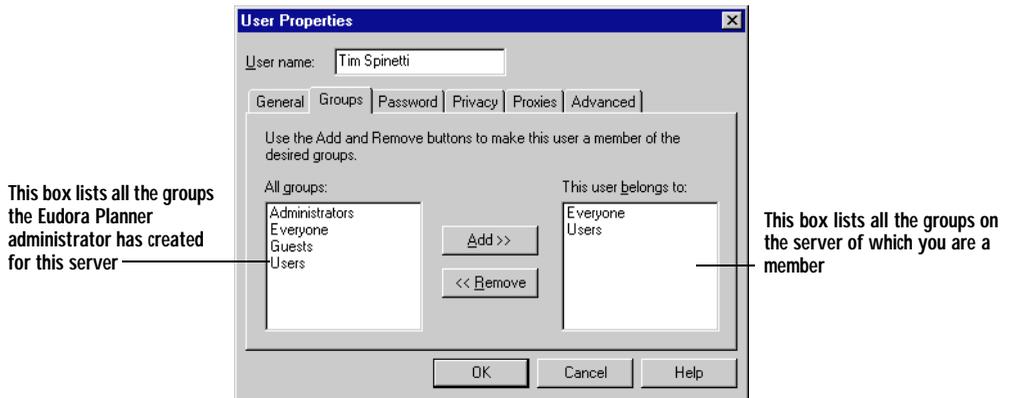
To view the groups you belong to:

1. From the **Tools** menu, select **Users and Groups**.

The Users and Groups dialog box appears.



- Click the **Server** arrow to display a list of servers to which you are connected, then select the server containing your user information.
- In the **Users and Groups** area, click the plus sign next to **Users**.
A list of the users contained on the server appears.
- Select your name, then click **Details**.
The User Properties dialog box appears.
- Click **Groups**.
The User Groups dialog box appears with your name in the User ID box. The Groups area shows you those groups on the server to which you belong.



You cannot add yourself to or remove yourself from any groups on a workgroup server, unless the Eudora Planner administrator has granted you Manage Users and Groups permission. Consult your Eudora Planner administrator if you want to change your group memberships.

Knowing Your Security Permissions for a Workgroup Server

The security permissions granted to you by the Eudora Planner administrator determine your level of access to information stored on a workgroup server. These permissions govern your ability to do routine tasks, like creating, deleting, and modifying Events and Contacts, or more complex operations, like administering some aspects of the workgroup server's user and groups configuration. The Eudora Planner administrator can grant or deny you any or all of eight different types of security permissions.

| Permission Type | When granted, lets the user... |
|-----------------------------------|---|
| Create/Modify Contacts and Events | Add, change or delete information contained in an item stored on the server. For example, a user with Modify permission can add a note to a public Contact or change the title of a public Event. However, Modify permission does not allow a user to delete an item. |

| Permission Type | When granted, lets the user... |
|--|---|
| Delete Contacts and Events | Delete Contacts and Events on the server. |
| Modify access for Contacts and Events | Change the access permissions of this user's Events and Contacts in regard to other users. |
| Create/Modify categories and custom fields | Add or change categories and custom fields stored on the server. |
| Delete categories and custom fields | Delete categories and custom fields on the server. |
| Manage servers | Connect to and disconnect from Eudora Planner workgroup servers. |
| Manage users and groups | Add users and groups to the server, as well as alter the attributes of existing users and groups, including their server permissions. |
| Take ownership of Contacts and Events | Gain ownership of another user's public Contacts and Events, so that Eudora Planner recognizes that the items belong to the new owner and not to the original owner. When a user takes ownership of public Contacts and Events, he or she has full permissions for them. Normally, only the Eudora Planner administrator has Take Ownership permission. |



Security permissions created on a Eudora Planner server affect only those Events, Contacts, categories, and custom fields residing on that server. If you are connected to multiple workgroup servers in your organization, your access permissions may differ for each server.

The Eudora Planner administrator can assign unique sets of security permissions to both users and groups, so there may be instances when permissions granted to you as a user seem to contradict those permissions denied to a group of which you are a member, or vice versa. In such instances, the explicit denial of a permission always overrides the granting of that permission elsewhere.

For example, imagine that you are assigned to a group called Sales. Because you are the manager of the sales department, you are granted all possible security permissions at the individual user level. However, because other users in the Sales group are not at your level, they are as a group denied permission to delete Events and Contacts from the server. In this case, because you belong to a group for which this permission has been explicitly denied, you do not have permission to delete Events and Contacts on that server, even though you've been granted that permission as an individual user.

Conversely, if the Sales group has been granted permission to delete Events and Contacts, but you as an individual user have been denied that permission, then you do not have the ability to delete Events and Contacts on that server.

Only the Eudora Planner administrator can change your security permissions for a workgroup server, but you can see which permissions have been granted to you. Consult your Eudora Planner administrator about any changes to your permissions.

To view your security permissions:

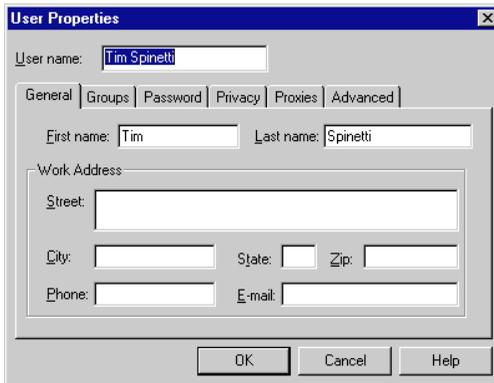
1. From the **Tools** menu, select **Users and Groups**.

The Users and Groups dialog box appears.

2. Click the **Server** arrow to display a drop-down list of servers to which you are connected, then select the server for which you want to see your permissions.

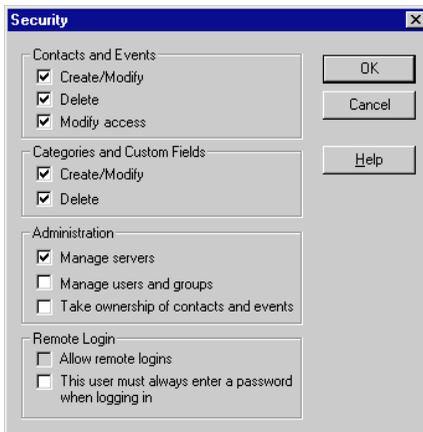
3. In the **Users and Groups** area, select your name, then click **Details**.

The User Properties dialog box appears.



4. Select the **Advanced** tab, then click the **Security** button.

The Security dialog box appears, displaying your permissions with regards to creating and modifying Contacts, Events, categories, and custom fields on this server. This dialog box also indicates which Administration rights, if any, you have for this server.



5. Click **OK** to close the Security dialog box.

Setting Privacy Permissions

Just as your Eudora Planner administrator determines your permissions for viewing or modifying information on a workgroup server, you too can administer other users' permissions for the shared Events and Contacts that you create. By granting or denying another user *privacy* permissions, you can determine the level of access that user has for your shared items. For example, you may want to give your manager and your assistant the ability to read, modify, and delete your Events and Contacts, whereas you give co-workers permission only to read those items.

Even if you've given a user particular privacy permissions for the Events and Contacts you create, you can deny that user those permissions for particular shared items. For information, see [“Setting Object Permissions” on page 140](#).

Although Eudora Planner gives you the flexibility to grant a particular user a specific set of permissions for your shared Events and Contacts, you cannot grant any permissions that the Eudora Planner administrator has explicitly denied to that user for the server. So, if the administrator has denied Howard Greene delete permission for Events and Contacts on the server, you cannot grant Howard Greene delete permission for your own shared Events and Contacts.



You cannot change other users' permissions for your shared Events and Contacts if your Eudora Planner administrator has not granted you Change Privacy permission. See [“Knowing Your Security Permissions for a Workgroup Server” on page 135](#) for instructions on how to tell whether you have Change Privacy permission.

You can grant other Eudora Planner users five different types of privacy permissions for shared Events and Contacts you create.

| Permission Type | When granted, lets other users... |
|-----------------|---|
| Delete | Delete this Event or Contact. |
| Modify | Add, change or delete information—such as titles, notes, and attachments—contained in this Event or Contact. |
| Modify access | Change the permissions for this Event or Contact. For example, if you assigned someone else Modify Access permission for this Event or Contact, they could in turn change the access permissions of this Event or Contact in regard to other users. |
| Read | View this Event or Contact (the default). |
| Take ownership | Take possession of this Event or Contact, if necessary. |

To set privacy permissions for your Events and Contacts:

1. From the **Tools** menu, select **Users and Groups**.
The Users and Groups dialog box appears.
2. From the drop-down **Server** list, select the workgroup server on which you want to change permissions.

3. In the **Users and groups** area, click the plus sign next to **Users**. Select your user name, then click **Details**.

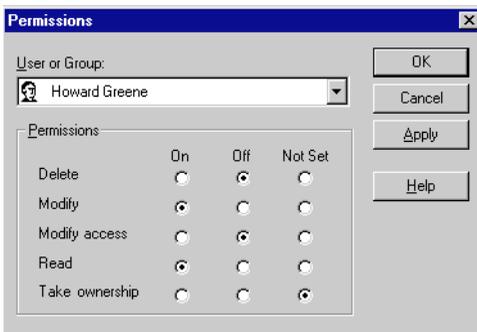
The **User Properties** dialog box appears.

4. Click the **Privacy** tab. Make sure the **Available to other users** option is selected, then click **Custom Privacy**.

The **Access Control List** dialog box appears.

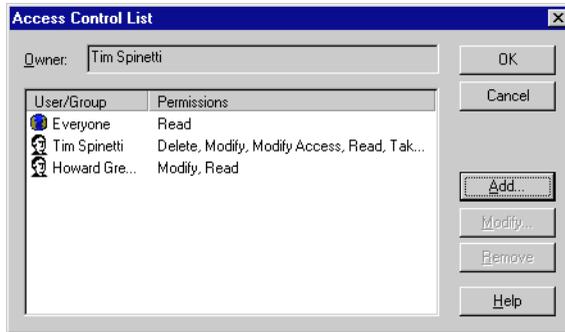


5. Click **Add** to open the Permissions dialog box. From the drop-down **User or Group** list, select the user or group for which you want to change permissions. In the **Permissions** area, choose the permissions you want to grant the user or group. Select **On** to grant a permission or **Off** to deny it. If you leave the option at **Not Set** for a user, then the user will retain the default permissions set by the server administrator for items on that server.



6. Click **Apply** to apply the permission changes you made. Then, click **Close** to close the Permissions dialog box.

The permissions you've granted to the user are reflected in the Access Control List dialog box.



7. Click **OK**.

The changes you've made are sent to the workgroup server during the next update. The user or group now has the permissions you've specified and can work accordingly with your public Events and Contacts.

 *These new privacy permissions apply only to Events and Contacts you create after changing these settings. Events and Contacts you created before changing these settings retain the privacy permissions that were in effect when you created them. To change the privacy permissions for existing Events and Contacts, you must do so individually as described in the following section.*

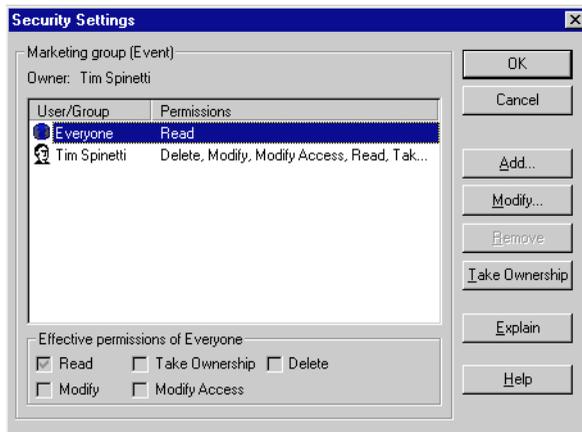
Setting Object Permissions

You may occasionally create Events and Contacts that you need to restrict to all but one or a few users. For such items, Eudora Planner lets you set *object* permissions—a set of user permissions specific to one Event or Contact. The permissions you give a user for a particular Event or Contact override the privacy permissions you've given to that user. For example, you may have granted your co-worker, Wendy Chin, every available privacy permission for your shared Events and Contacts. However, since you don't want her to know about the surprise birthday party the office has planned for her, you deny her read permission for the particular Event denoting that occasion.

To set permissions for an individual Event or Contact:

1. For an Event, in one of the Calendar Views, select the Event for which you want to set permissions. For a Contact, in the List View, select the appropriate Contact.
2. From the **Edit** menu, select **Security**.

The Security Settings dialog box appears.

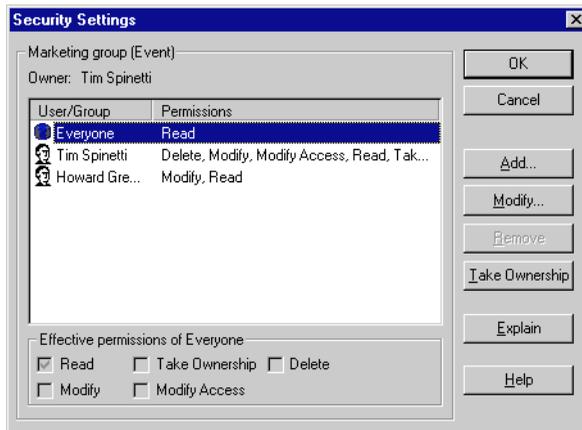


3. Click **Add** to give another user permissions for this Event or Contact.

The Permissions dialog box appears.

4. In the **Permissions** area, choose the permissions you want to grant the user or group. Select **On** to grant a permission or **Off** to deny it. If you leave the option at **Not Set** for a user, then the user will have the permissions.
5. Click **Apply** to apply the permission changes you made. Then, click **Close** to close the Permissions dialog box.

The permissions you've granted to the user for this Event or Contact are reflected in the Security Settings dialog box.



6. Click **OK**.

The changes you've made are sent to the workgroup server during the next update. The user or group now has the permissions you've specified and can work accordingly with the Event or Contact.

Chapter 8

Using Web Publisher

Eudora Planner's Web Publisher plugin lets you publish your Event and Contact information to ready-made World Wide Web pages that can be incorporated into any Internet or intranet site. With Web Publisher, you don't have to know HTML (Hypertext Markup Language) to create Web pages that have the refined look and feel of the Eudora Planner Calendar and Address Book, because Web Publisher automatically generates all the necessary files for you. So, whether you need to create an employee directory for your company's intranet site or a calendar of events for your community association's World Wide Web site, Web Publisher can save you the time and effort of designing and updating your Web pages.

This chapter explains how to use Web Publisher, including:

- A Web Publisher overview, which describes how this feature can enhance the appearance of your Web site
- Instructions for creating basic Web pages
- An explanation of Web Publisher's advanced options, so you can customize your Calendar and Contact pages

A Web Publisher Overview

This section describes how Web Publisher can help you improve the look of your Web pages.

Improve the Look of Your Web Page

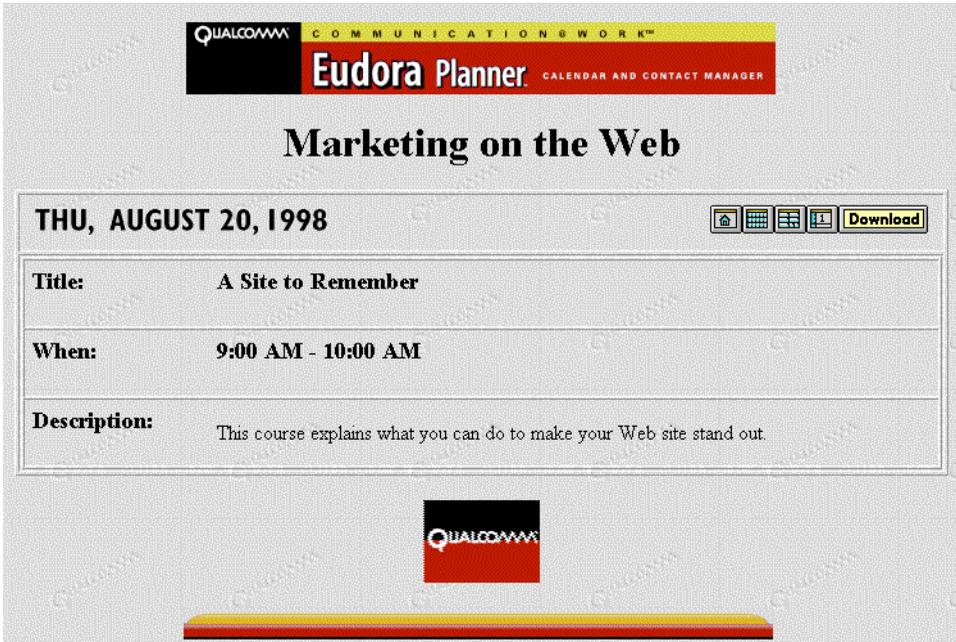
If your organization uses an Internet or intranet site to broadcast schedules of events, then Eudora Planner's Web Publisher may be just the tool for making those schedules more appealing to visitors to your site.

When you use Web Publisher, the calendar on your Web site can look like this:

|  AUGUST 1998  | | | | | | |
|---|--|--|---|--|--------------------|---|
| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
| | | | | | | 1 >> 8a Basic HTML |
| 2 | 3 | 4 >> 1p Beyond the Basics | 5 | 6 >> 10a Choose Your Tools | 7 | 8 |
| 9 | 10 >> 9a Design It Yourself | 11 | 12 >> 9a Content Matters | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 >> 9a A Site to Remember | 21 | 22 |
| 23 | 24 | 25 >> 11a Web Commerce | 26 | 27 | 28 | 29 |
| 30 | 31 >> 9a The Next Trend | | | | | |

The layout is as familiar as a wall calendar, so visitors to your site can easily navigate to specific dates. Depending on your needs and preferences, you can publish Week, Day, and Detail views that resemble those in Eudora Planner, with each view accessible by the click of a button in the button bar.

If you do choose to publish the Detail View, visitors can see specific details about an Event just by clicking it in any view.



The screenshot displays the Eudora Planner web interface. At the top, there is a header with the Qualcomm logo and the text 'COMMUNICATIONS WORK™'. Below this, the main title 'Eudora Planner' is displayed in a large, bold font, with 'CALENDAR AND CONTACT MANAGER' in a smaller font to its right. The main content area features a large heading 'Marketing on the Web'. Below this heading, the date 'THU, AUGUST 20, 1998' is shown. To the right of the date are several small icons: a home icon, a calendar icon, a list icon, a print icon, and a 'Download' button. Below the date and icons, there is a table with three rows of event details:

| | |
|---------------------|---|
| Title: | A Site to Remember |
| When: | 9:00 AM - 10:00 AM |
| Description: | This course explains what you can do to make your Web site stand out. |

At the bottom of the screenshot, there is a Qualcomm logo and a decorative horizontal bar with a gradient from yellow to red.

In the Detail View, a visitor can see the title, date, and time of an Event, as well as any information you've entered into the Event's Description field.

And Web Publisher isn't only for publishing Events. You can likewise publish your Contacts in a format that's just as easy to navigate:

The screenshot shows the Eudora Planner web interface. At the top, there is a header with the Qualcomm logo and the text "COMMUNICATIONS WORK™". Below this is the "Eudora Planner" title in a red box, with "CALENDAR AND CONTACT MANAGER" in smaller text to the right. A navigation instruction reads "Drag and drop the >> to add items to your Eudora Planner Contact manager." Below this is a grid of buttons for sorting contacts by letter: A, B, C, D, E, F, G, H, I, J, K, L, M, Other, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, and All. A yellow "Download" button is also present. The main content area is a table with three columns: a link to view details (e.g., ">> Fisher"), a name, and a company or organization. The table contains eight rows of contact information. At the bottom of the interface, there is a Qualcomm logo and a red and yellow gradient bar.

| >> | Name | Company/Organization |
|-----------------------------|--------------|----------------------------|
| Fisher | Ramsay | Ticker Trackers, Inc. |
| Gorsky | Yuri | Yuri's Screws, Inc. |
| Gris | Jean-Michael | West Coast Lubricants |
| Holmes | Chester | HR Solutions |
| Karetsky | Stanislaus | Catawba College |
| Lichenstein | Casey | Universal Cellular |
| Linke | Inga | Forlane University |
| Mann | Ernest | Interconnectedness Project |

A person browsing this page can click a letter button to view only Contacts sorted by that letter or click the **All** button to see the complete listing of Contacts.

The Detail View for a particular Contact can be opened by clicking the hypertext (underlined text) in that Contact's Last Name field:



The Detail View displays more specific information about a Contact. In fact, you can use Web Publisher's advanced options to specify exactly which Contact fields appear in the Detail View. For more information, see ["Customizing Calendar and Contact List Pages" on page 153](#).

Drag and Drop from a Calendar or Contact List Page

When you use Web Publisher to create Calendars and Contact Lists for your Web site, Eudora Planner users browsing your site have the ability to drag your published Event and Contact information directly into their own Calendars and Address Books. That's because Web Publisher employs *Versit* card (or *vCard*) technology, which enables users to drag objects (in this case, Events and Contacts) from a Web page to a desktop application. A Web Publisher vCard can contain all the details for a particular Event or Contact, or even whole categories of Events or Contacts. A Eudora Planner user need only have Eudora Planner open when visiting your site. When the user drags an Event or Contact vCard into the Calendar or Address Book, all the information for the item is placed in Eudora Planner file, just as if the user had manually entered it. What's more, the vCard inserts a live link to your Web site into the Event and Contact, so that the user need only click the link to launch a browser and revisit your site for updates or new information.

The Web Publisher View



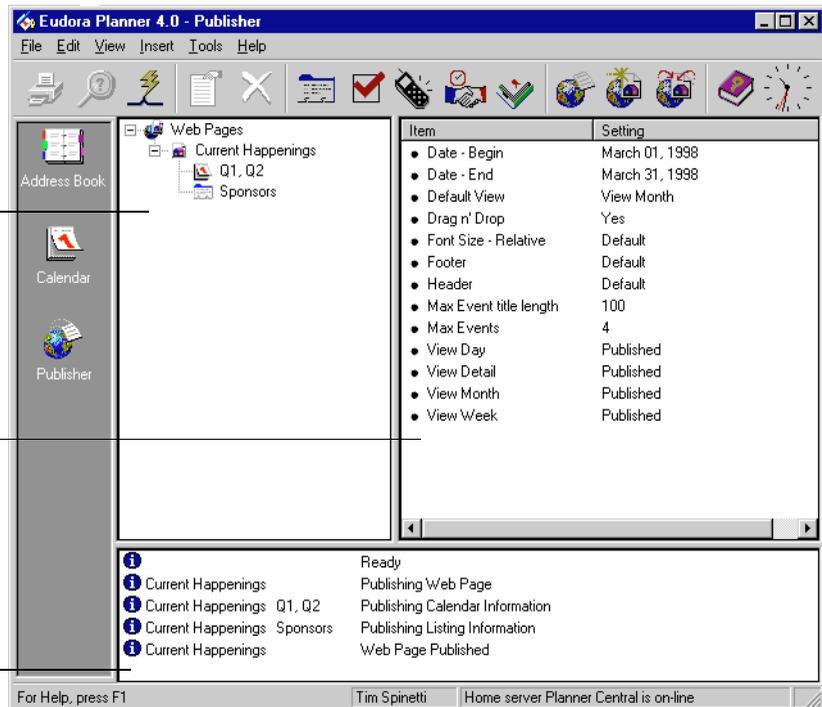
To open Web Publisher, select **Publisher** from the **View** menu.

The Web Publisher plugin organizes the pages you publish in a hierarchy displayed in the top left pane of the window. When you select a page, the properties of that page are listed in the right pane. At the bottom of the window, status messages report the results of a publishing operation.

The Pages pane lists the hierarchy of all home pages, calendars, and listings currently defined. Click an entry to see its properties in the Details pane

The Details pane lists the properties of the page selected in the Web Pages pane. Double-click on a Detail name to change its value in the Web Page Properties, Calendar Properties or Listing Properties dialog box

The Status pane lists messages generated during the creation of published pages, calendars and listings. Right-click in this area to select reporting options or clear existing messages



Basic Web Publishing

This section explains how to use Web Publisher to publish basic Event and Contact Web pages, including:

- Creating a main page
- Adding Calendar or Contact List pages to the main page
- Publishing a set of Web pages

The pages you create by following these steps are “basic” only in that they retain most of Web Publisher’s default settings. To alter your Web Publisher pages to accommodate your needs or those of your organization, follow the steps in this section, then go to [“Customizing the Appearance of a Main Web Page”](#) on page 152 and [“Customizing Calendar and Contact List Pages”](#) on page 153.

Creating a Main Page

The first step in publishing your Eudora Planner information to the World Wide Web is to create a main page. The main page acts as a foreword for any of the various Event and Contact pages you publish, since it lists and provides a link to those pages. You can add multiple Calendar and Contact List pages to a single main page, or create a separate main page for each Calendar or Contact List you publish.

To create a main Web page:



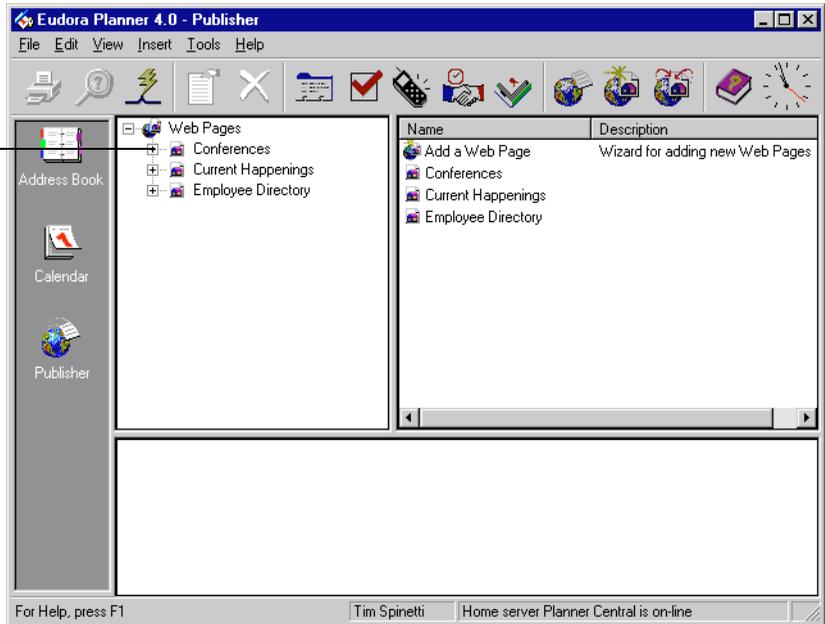
1. From the **Insert** menu, select **New Web Page**.

The Web Pages dialog box appears.

2. Enter a name for the Web page in the **Name** box. Optionally, you can type a brief description of this page in the **Description** box.
3. Click **OK**.

A main Web page, with the name you assigned it, is added to the list in the Web Pages pane.

The Web page you've created is listed here



Choosing Export Options

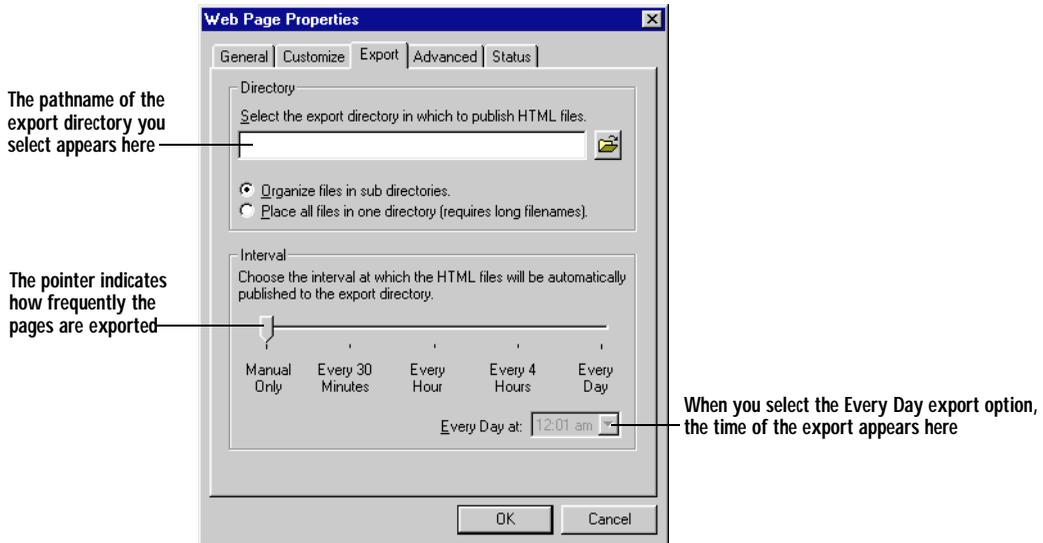
Once you've created the main Web page, you need to determine where, and how frequently, you want to export that page's HTML files.

To determine export settings for a Web page:

1. Select the Web page in the Web Pages pane. Then, from the **Edit** menu, select **Details**.

The Web Page Properties dialog box appears, displaying the General tab. The **Name** box shows the name of the Web page you've selected.

2. Click the **Export** tab.



3. Select the directory to which you want to export this page's HTML files.
4. Select **Organize files in subdirectories** to have related files export to subdirectories within the directory you specified in step 3; or, select **Place all files in one directory** to have all files reside in the main directory.
5. Drag the **Interval** pointer to select the time interval between exports:
 - Select **Manual Only** if you want Web Publisher to export the files when you prompt it.
 - Select from among the **Every 30 Minutes**, **Every Hour**, and **Every 4 Hours** options to have the files export at one of those intervals.
 - Select **Every Day** to have the files export once a day. Click the **Every Day at** drop-down list to specify the time at which you want the daily export to occur.
6. Click **OK**.

Web Publisher is configured to export the page to the directory you've chosen at the time interval you've specified. You can now add Event or Contact information to the page as described in [“Adding Calendar and Contact List Pages to the Main Web Page” on page 151](#).

Web Publisher provides additional control over the look of your main pages, and lets you add additional content and processing to the pages you create. For information on these advanced publishing options, see [“Using Pre- and Post-Processing Scripts” on page 160](#).

Adding Calendar and Contact List Pages to the Main Web Page

The next step is to add Event or Contact information to the Web page, which you do by creating pages that contain this information. Pages containing Event information are called *Calendar* pages in Web Publisher; pages containing Contact information are called *Contact List* pages. You can create multiple Calendar and Contact List pages to be associated with a main Web page.

To create a Calendar or Contact List page:



1. From the **Insert** menu, select **New Calendar/Contact List**.

The Select Web Page dialog box appears.

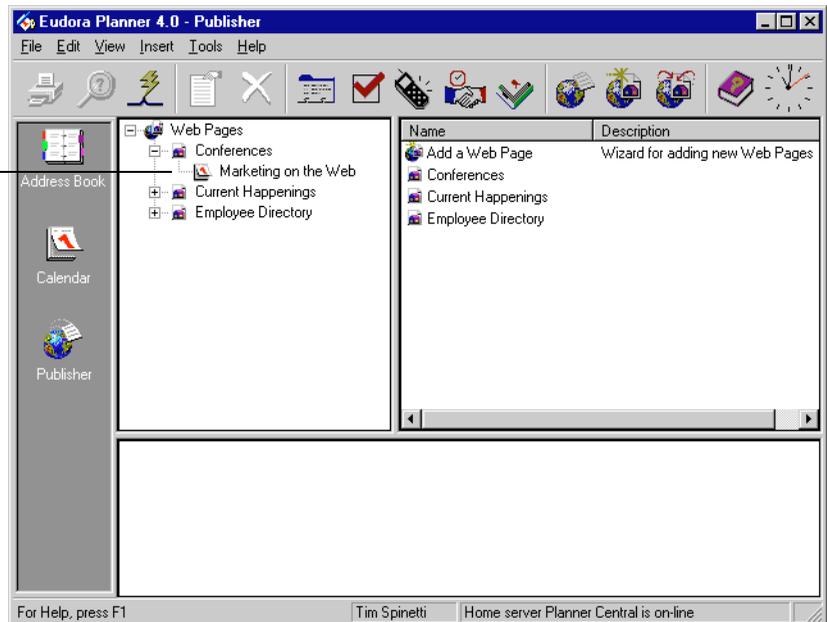
2. Select the Web page to which you want add a Calendar or Contact List page, then click **OK** to open the Add a Calendar or Contact List dialog box. Specify the following information:

- In the **Name** box, enter a name for the calendar or listing.
- Of the **Publishing Format** options, select either **Calendar** or **Contact List**.
- Optionally, type a description of the Calendar or Contact List page in the **Description** box.

3. Click **OK**.

The Calendar or Contact List page you've created appears in the Web Pages pane under the main Web page to which you've added it.

The Calendar or Contact List page appears under the main Web page



4. In the **Web Pages** pane, select the Calendar or Contact List page you want to configure. Then, from the **Edit** menu, select **Details**.

The Calendar or Contact List Properties dialog box appears, displaying the General tab.

5. If you are configuring a Calendar page, use the **Date Range** options to select the range of Events you want to publish. If you are configuring a Contact List page, go to step 6.
6. Click the **Categories** tab. Then, select the categories that you want to publish.
7. Click **OK**.

The Calendar or Contact List page is configured to publish the information you've selected. The page retains most of Web Publisher's default settings.

Publishing Your Web Page Set

Once you've configured a set of Web pages, you can publish them to create the HTML files to be incorporated into your Web site.

To generate HTML files:



1. From the **Tools** menu, select **Publish**.

The Select Web Page dialog box appears.

2. Select the main Web page that you want to publish, then click **OK**.

Eudora Planner begins generating the Web page set you selected. Messages appear in the Status pane, indicating the progress of the Web page publishing. When the operation is complete, the message "Web Page Published" appears.

You can further refine the appearance of the main Web page using the Web Page Properties dialog box. For information on these advanced options, see ["Advanced Web Publishing" on page 152](#). For information on how to refine Calendar and Contact List pages, see ["Calendar Page Options" on page 154](#) and ["Contact List Page Options" on page 156](#).

Advanced Web Publishing

You can customize the appearance of the pages you create with Web Publisher in order to display a company logo or eye-catching graphics.

Customizing the Appearance of a Main Web Page

The main Web page acts as a directory for and link to your Calendar and Contact List pages, so it's the first page a person will see when trying to access those pages. You can alter the appearance of this page to suit your needs.

To customize the appearance of a main Web page:

1. In the **Web Pages** pane, select the Web page you want to customize. Then, from the **Edit** menu, select **Details**.

The Web Page Properties dialog box appears, displaying the General tab.

2. If you want the name or description of the Web page to appear on the page, select the **Display name on Web Page** or **Display description on Web Page** options. Otherwise, go to step 3.
3. Click the **Customize** tab to view the custom options.
4. To replace the standard header and footer of the Web page with a custom header and footer, click the buttons next to the **Header** and **Footer** boxes to browse to find and select the files containing those custom items.

The pathname of the files will appear in the Header and Footer boxes.

5. Choose one of the options in the **Display** area:
 - Select **HTML View** to publish Calendars and Contact Lists viewable by any browser.
 - Select **Plug-in View** to publish Calendars and Contact Lists viewable only by browsers enhanced by the AboutTime and AboutPeople plug-ins.
 - Select **Both** to publish both the HTML and Plug-in views.

For more information about the Plug-in view, see [“Using the AboutTime and AboutPeople Plugins” on page 161](#).

6. In the **Customize HTML Output** section, select **Drag and Drop Handles for Versit Cards** if you want handles to appear next to items that can be dragged from a Calendar or Contact List page to a Eudora Planner Calendar or Address Book.
7. Click **OK**.

The next time you export to HTML, the appearance of your Web pages will reflect the changes you’ve specified.

Customizing Calendar and Contact List Pages

Just as you can reconfigure the properties of the main Web page to alter its appearance, so too can you customize each Calendar and Contact List page associated with the main page.

To configure a Calendar or Contact List page:

1. In the Web Pages pane, select the Calendar or Contact List page you want to configure. Then, from the **Edit** menu, select **Details**.

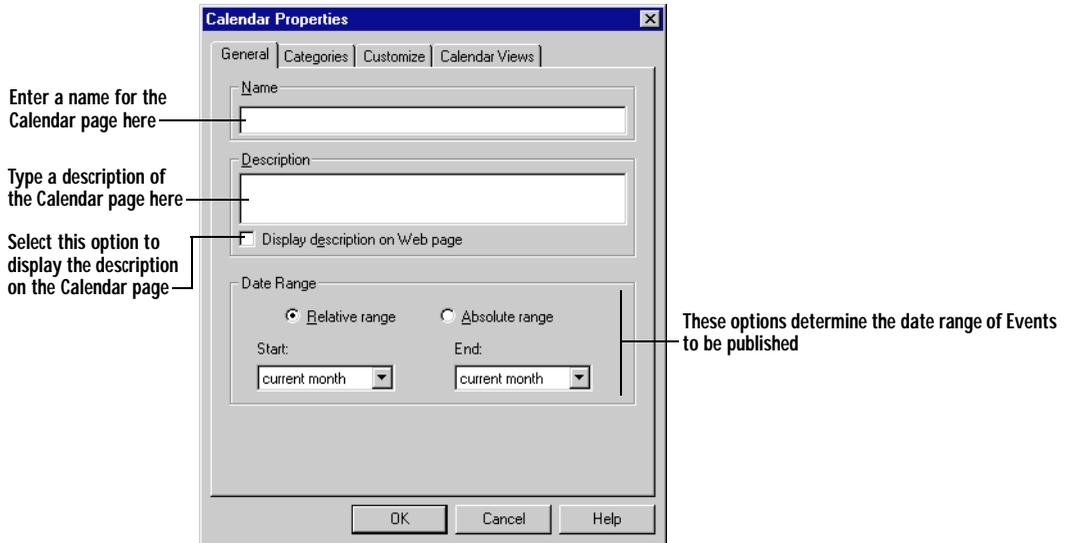
The Calendar Properties or Contact List Properties dialog box appears, displaying the General tab. The Name and Description boxes contain the information you entered when you created the page.
2. Go through each tab in the dialog box and change any settings to reflect your preferences. The options in the Calendar Properties dialog box are described in [“Calendar Page Options” on page 154](#). The option in the Listing Properties dialog box are described in [“Contact List Page Options” on page 156](#).
3. After you’ve chosen the appropriate options, click **OK**.

Calendar Page Options

Each tab on the Calendar Properties dialog box contains options that affect the contents and appearance of your Calendar pages. This section describes, in order, the options on each tab.

General Tab

Use this tab to enter general information about the Calendar page and to determine the range of Events appearing on the page.



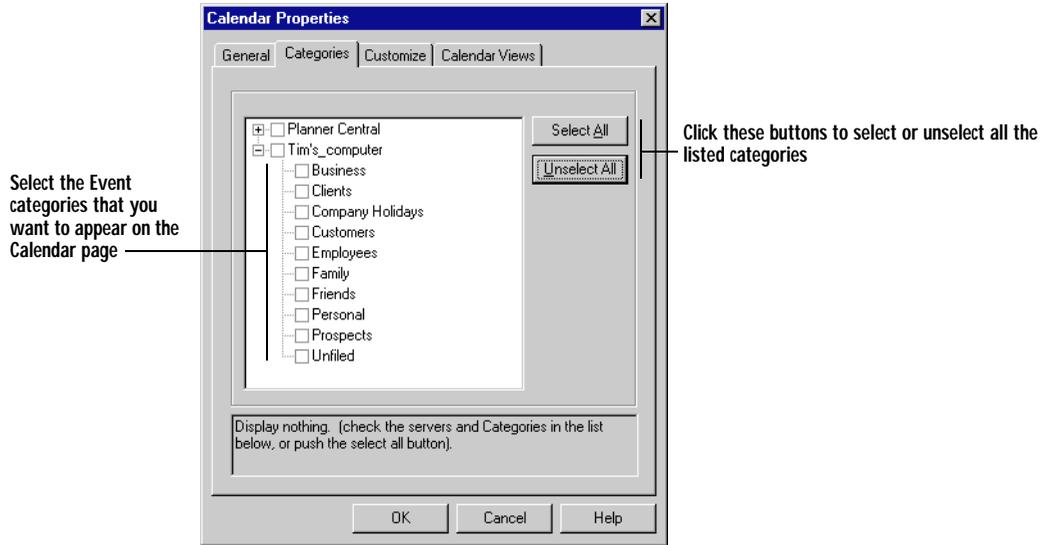
Enter a name and description for the Calendar page in the **Name** and **Description** boxes. Select the **Display description on Web page** option if you want the description to appear on the page.

Use the **Date Range** options to determine the range of Events you want to publish:

- Select **Relative Range** if you want to publish Events within a range of time always relative to the current month. For example, if you select a **Start** date of -2 months and an **End** date of +3 months, Web Publisher will publish a Calendar that shows Events for the two months previous to this month, the present month, and three months into the future.
- Select **Absolute Range** if you want to publish Events that fall within two specific dates.

Categories Tab

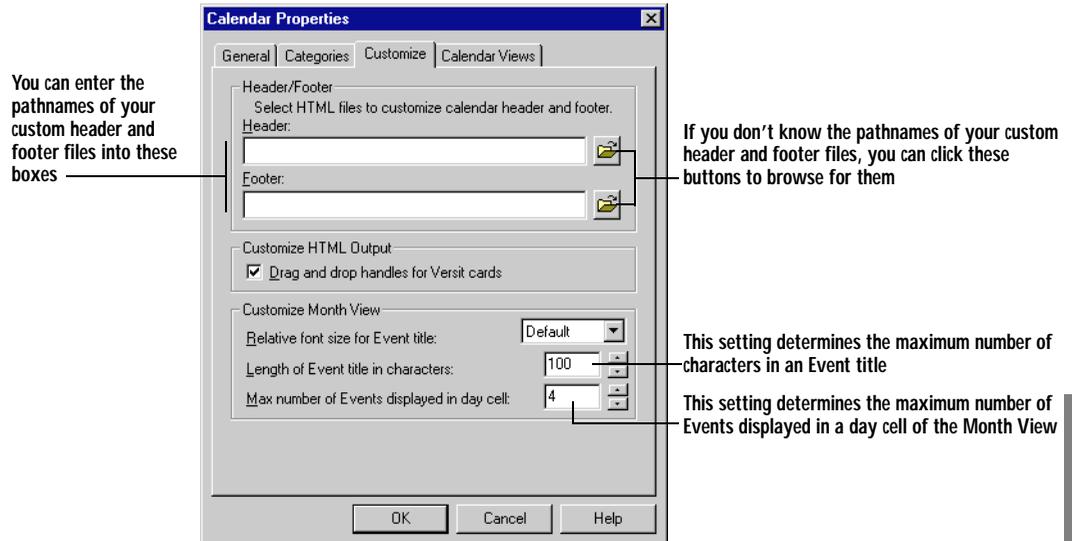
Use this tab to select the categories you want to appear on the Calendar page.



Select the Event categories that you want to appear on the page. You can select categories from both your local server and any workgroup server to which you're connected.

Customize Tab

Use the options on this tab to customize the appearance of your Calendar pages.



The **Header/Footer** options let you place a custom header and footer on each Calendar page, so, for example, you can populate the pages with your organization's logo. In the **Header** and **Footer** boxes, enter the pathnames of the HTML files

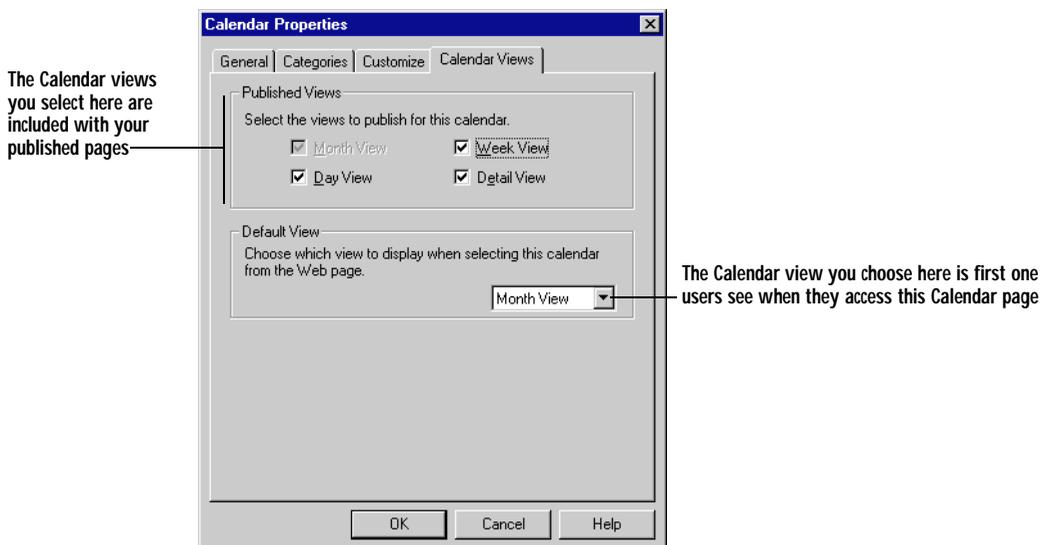
containing the custom header and footer. If you don't know the pathnames of the files, click the button adjacent to each box to browse for those files.

Select the **Drag and Drop Handles for Versit Cards** option if you want drag handles to appear next to Event items that can be dragged from you Web page to a Eudora Planner Calendar.

The settings in the **Customize Month View** area let you change how Event information appears in the Calendar page's Month View. The **Relative font size for Event title** setting determines the font size of Event titles relative to their accompanying description text. The **Length of Event title in characters** setting determines the maximum length of Event titles in the Month View. The **Max number of Events displayed in day cell** setting determines the maximum number of Events that will appear in the day cell of the Month View.

Calendar Views Tab

Use this tab to select which Calendar views are published by Web Publisher and, of those views, which is the first seen by a visitor to your Calendar page.



Web Publisher always publishes the Month View. You can choose to additionally publish the **Day View**, **Week View**, and **Detail View** by selecting the appropriate check boxes.

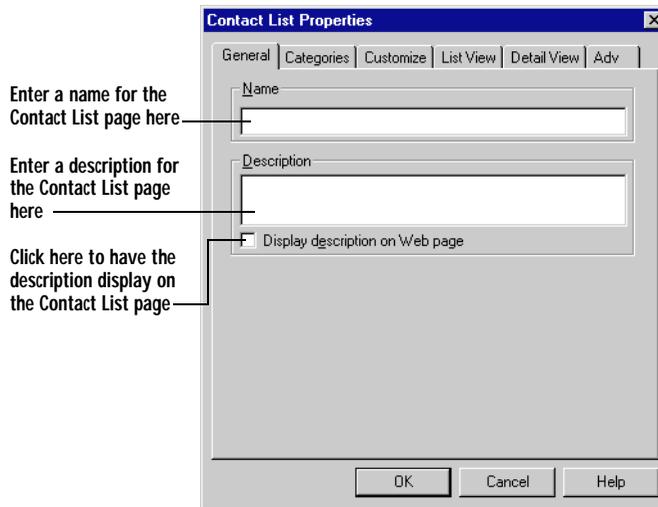
To determine which Calendar View visitors see when they first access the Calendar page, select a **Default View** from the drop-down menu.

Contact List Page Options

The options in the Contact List properties dialog box determine the content, appearance, and overall framework of your Contact List pages. This section describes the options available on each tab.

General Tab

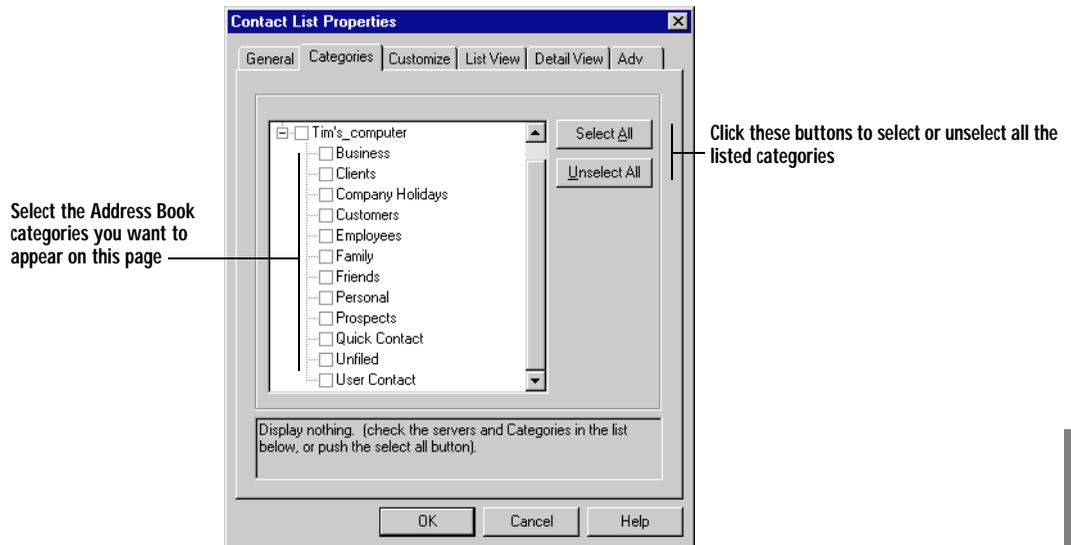
Use this tab to enter general information about the Contact List page.



Enter a name and description for the Contact List page in the **Name** and **Description** boxes. Select the **Display description on Web page** option if you want the description to appear on the page.

Categories Tab

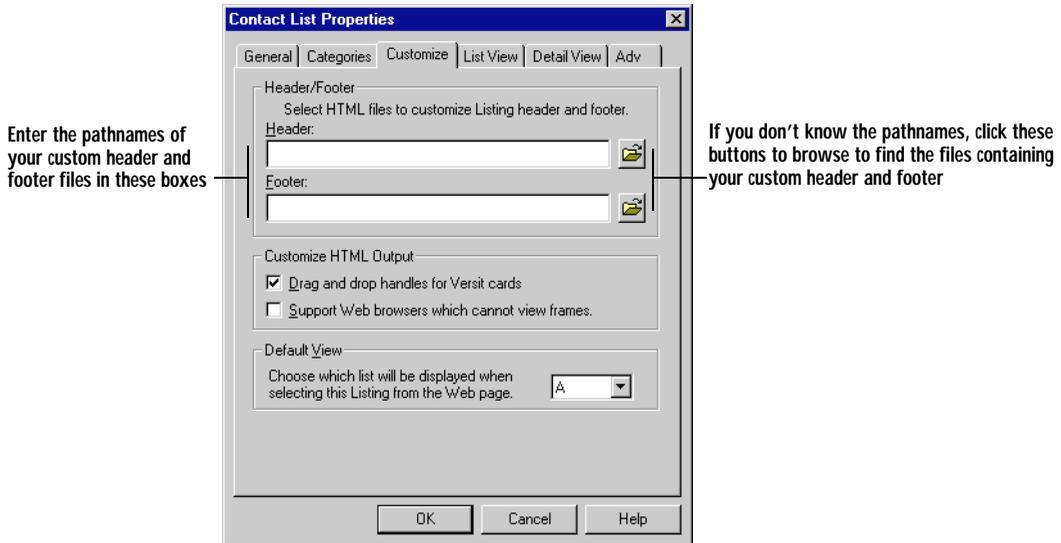
Use this tab to determine which categories appear on the Contact List page.



Select the Address Book categories that you want to appear on the page. You can select categories from both your local server and any workgroup server to which you're connected.

Customize Tab

Use this tab to customize the appearance of your Contact List page.



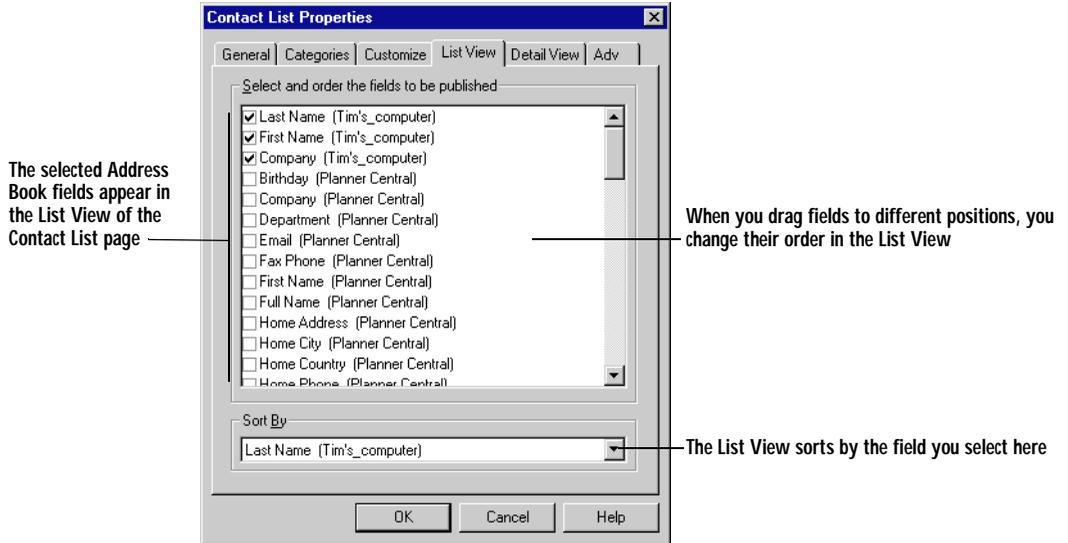
Use the options in the **Header/Footer** area to place a custom header and footer on each Listing page. In the **Header** and **Footer** boxes, enter the pathnames of the HTML files containing the custom header and footer. If you don't know the pathnames of the files, click the button next to each box to browse for those files.

Select the **Drag and Drop Handles for Versit Cards** option if you want handles to appear next Contact items that can be dragged to the Eudora Planner Address Book from the Web page. Select the **Support Web Browsers which cannot view frames** option if you want the Listing page to be available to browsers that cannot view HTML frames.

Use the **Default View** option to determine whether a person initially accessing the Contact List page sees a page displaying all Contacts or just those sorted under the letter "A."

List View Tab

Use this tab to determine which Address Book fields are displayed in the Contact List page's List View and the order in which they appear.

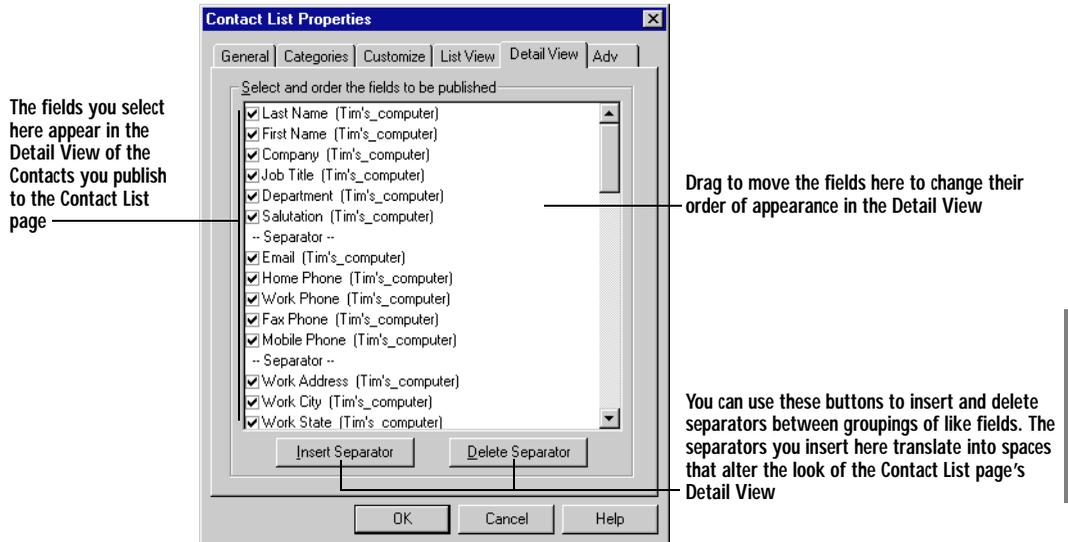


Select those fields that you want to display and drag them to reorder them.

From the **Sort by** drop-down list, select the Contact field by which you want the List View to sort.

Detail View Tab

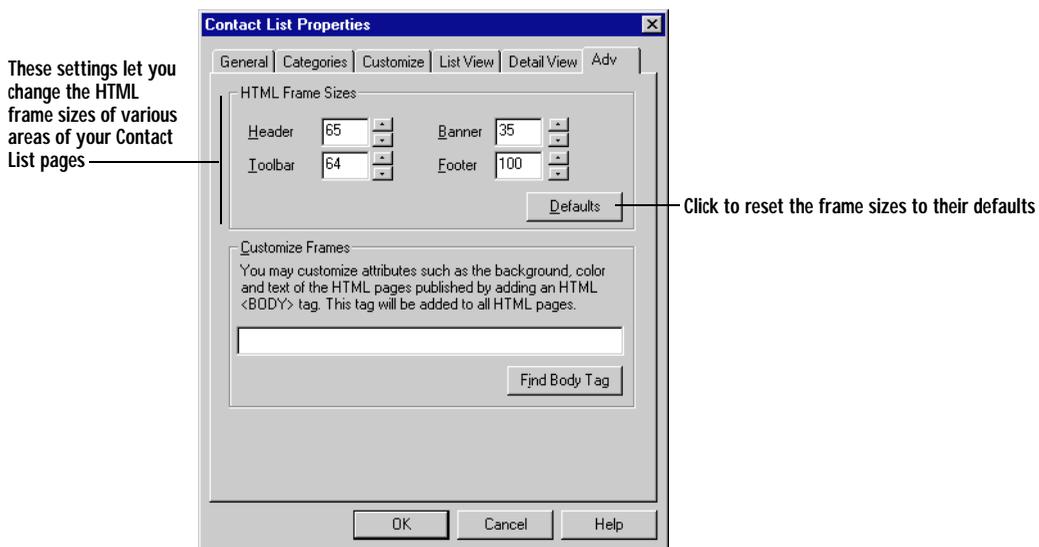
Use this tab to determine which Address Book fields are displayed in an individual Contact's Detail View and the order in which they appear.



Select those fields that you want to appear in the Detail View and drag them to change their order in the view.

Advanced Tab

Use this tab to alter the attributes of the Contact List page's HTML frames.



In the **HTML Frame Sizes** area, select the sizes of the header, toolbar, banner, and footer appearing on the Contact List page.

Using Pre- and Post-Processing Scripts

You can set Web Publisher to execute pre- and post-processing scripts before and after it publishes your information. These scripts can automate the, Web Publisher can execute the running of pre- and post-processing scripts which, You can use pre- and post-processing scripts to further modify the contents and appearance of your Web Publisher pages.

Pre- and post-process scripts let you insert dynamic information into your Web Publisher pages. This dynamic information can consist of such details as the current system date and time, the last modification date of the HTML document, a Web page counter, or the contents of another document. For more details about these options, see [“Advanced Tab” on page 160](#).

To run a pre- or post-processing script:

1. In the **Web Pages** pane, select the Web page for which you want to run the script. Then, from the **Edit** menu, select **Details**.
The Web Page Properties dialog box appears.
2. Select the **Advanced** tab.
3. To use a pre-processing script, enter the script's pathname into the **Run this script before the HTML publishing begins** box. To use a post-processing

script, enter the script's pathname into the **Run this script after the HTML publishing finishes** box.

4. To determine the maximum amount of time Web Publisher allows for a script to be executed, enter a value into the **Maximum seconds for script timeout** box.
5. To make Web Publisher stop publishing when it detects in error in a pre- or post-processing script, select **Stop publishing on script error**.
6. Click **OK**.

Web Publisher is configured to run the selected pre- and post-processing scripts the next time it publishes HTML files.

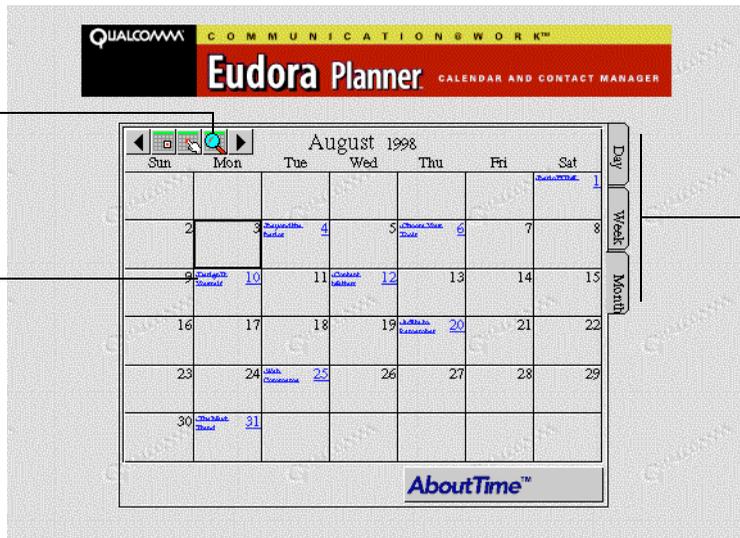
Using the AboutTime and AboutPeople Plugins

AboutTime and AboutPeople are Netscape plugins that enable Netscape Navigator users to view enhanced Web Publisher pages that provide greater speed, flexibility, and search capabilities than can be had when viewing HTML alone.

AboutTime allows visitors to your Web site to see pages displaying the Calendar *Plugin View*.

A visitor to this page can search for an Event by clicking here

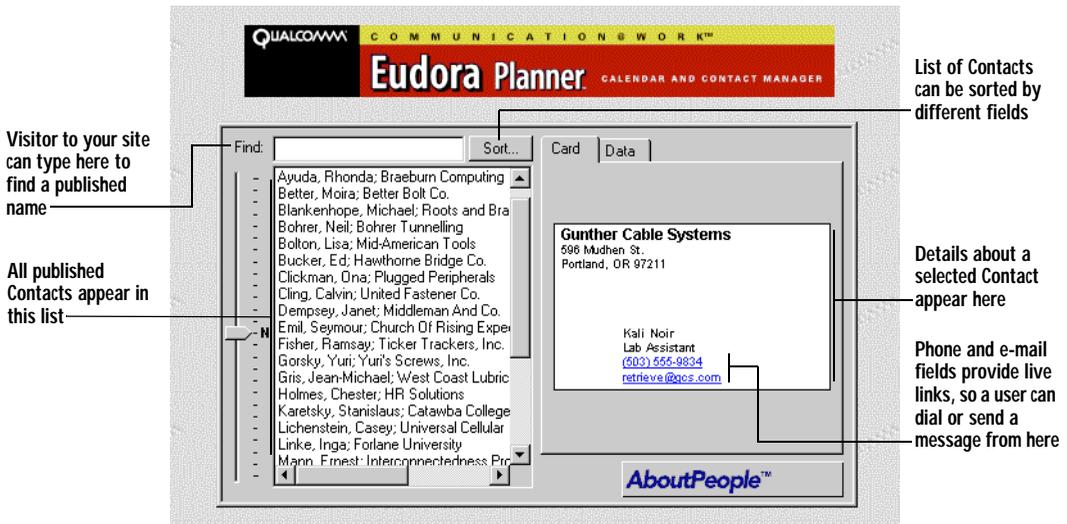
Clicking an Event shows details about the Event



Clicking these tabs lets a visitor quickly navigate between views

In this view, you can navigate instantly to different calendar views without having to actually switch Web pages. You can also search for Events either by title or by words in the Event's description.

AboutPeople allows users to see pages displaying the Contact List *Plugin View*.



This view lets visitors sort, scroll through, and search the list of published Contacts, so they can quickly find the names they want.

To publish the Plugin View:

1. In the **Web Pages** pane, select the primary page of the Web page set for which you want to publish the Plugin View. Then, from the **Edit** menu, select **Details**.
The Web Page Properties dialog box appears.
2. Select the **Customize** tab.
3. In the **Display** section, select from among the following options:
 - Select **Plug-in View** to publish Calendars and Contact Lists viewable only by browsers enhanced by the AboutTime and AboutPeople plug-ins.
 - Select **Both** to publish both the HTML and Plug-in views.
4. Click **OK**.

Web Publisher is configured to publish the Plug-in View (as well as the HTML View, if you selected the **Both** option in step 3).

Using the Status Pane

Web Publisher's Status pane, located at the bottom of the Web Publisher window, displays messages about the publishing process when you initiate the publishing of a Web page set. You can select which type of messages appear in the Status pane during publishing, as well as clear the messages from the pane when the publishing operation is complete.

To set the Status pane preferences:

1. Right-click any message appearing in the Status pane.
A pop-up menu appears.
2. Select **Properties**.
The **Web Publishing Applet Options** dialog box appears.
3. Select which of the following types of messages you want to appear in the Status pane during the publishing operation:
 - Select **Errors** to be alerted to any application errors that occur.
 - Select **Warnings** to be alerted when a publishing operation cannot be executed due to an erroneous properties setting.
 - Select **Status Information** to see a general progress report of the publishing operation.
 - Select **Verbose Information** to have your progress report contain specific information about what is being published, such as the range of Events or Contacts.
4. Use the **Max number of messages to display** option to determine the maximum number of messages that can appear in the Status pane.
5. Click **OK**.
The Status pane will reflect your preferences the next time you publish a Web page set.

To clear messages from the Status pane:

1. Right-click any message in the Status pane.
A pop-up menu appears.
2. Select **Clear Messages**.
All messages appearing in the Status pane are deleted.

Glossary

Address Book—How Eudora Planner displays Contact information. The Eudora Planner Address Book can be viewed using the List View or Detail View.

Auto-Caps—An Address Book feature that automatically capitalizes the first letter of any word typed into a Contact Detail field. Auto-Caps functions in the Name, Company, City, State, Country, and Salutation fields.

Auto-Complete—An Address Book feature that automatically finishes what you are typing into a Contact Detail field. Auto-Complete functions in the Name, Company, and City fields.

Auto-Fill—An Address Book feature that automatically adds a work address to a Contact's record after you enter a company name already associated with an address elsewhere in your database.

Auto-Pick—A group scheduling feature that searches for a free period of time common to a group of meeting invitees, then automatically schedules a meeting for that time.

Banner—An Event type that appears in any Calendar view as a floating object containing a line of text. Banners can indicate a plan or activity that spans a number of days or weeks, such as a 3-day business trip.

busy time—Concerning Eudora Planner's group scheduling feature, a period of time that is occupied by an Event for which you've selected the Show Time as Busy option or that you've designated as unavailable time in the Availability preferences. Other Eudora Planner users can see your blocked time when they invite you to a meeting.

blocked time—See *busy time*.

Calendar Event—See *Event*.

Calendar—How Eudora Planner displays Event information. Calendar

information is displayed in four different Calendar views—Month, Week, Day and Multi-Day.

Category—A method for classifying Events and Contacts that are related to each other. You can create a Category called “Work” and assign Events and Contacts that are work-related to that Category. Categories provide a way to separate and filter your Event and Contact information (see *Tab*).

cell—A box that represents a day in the Month and Week views or an increment of time in the Day and Multi-Day views.

Contact—A single entry in the Address Book that contains name, company, address, phone and other essential information on a person and/or company.

Contact heading—The area at the top of the Contact Details dialog box that contains the Contact’s primary name and phone number.

Contact Detail—A dialog box that contains information for a particular Contact, including name, company name, addresses, phone numbers, e-mail addresses, notes, attached documents, and related Events.

database—The file in which Eudora Planner stores Event and Contact information as well as and supporting information such as Categories, Tabs, graphics, preferences settings, etc.

complete—A term denoting the status of a To-Do or Call. A To-Do or Call is by default marked as Incomplete, but is marked as Complete when the task it represents has been completed.

duration—The difference between an Event’s start and stop times, or simply, how long the Event lasts.

Event—An entry in your Calendar that represents a Meeting, Call, To-Do, Holiday, Special Event, Banner, or Sticky Note. The word *Event* is used in general to refer to any activity you schedule in your Calendar.

Event Detail—A dialog box containing controls for changing Event attributes, including the title, description, attached Contact data or documents, start time, stop time, Category, Priority, and duration. You can also use this dialog box to specify whether or not an Event will have a Reminder alert attached to it. There is a specific Detail dialog box for each type of Event.

export—A function that copies Event or Contact data and saves it to an external file for use in another program.

filter—See *To-Do and Call Filter*.

footer—User-definable text that appears at the bottom of printed output; you can create a custom footer by clicking Header/Footer in the Print dialog box.

graphic—A bitmap (BMP file) that is assigned to an Event or used as a background in a Calendar View. Graphics can give special significance to

individual Events or add visual appeal to your Calendar.

header—User-definable text that appears at the top of printed output; you can create a custom header or footer by clicking “Header/Footer...” in the Print dialog box.

heading—1) The top section of the current Calendar View; for example, in the Month View, the area that shows the month and year is the heading. 2) In the Address Book’s List View, the area at the top of each column, indicating what data the column displays, that you can click to sort each column and drag to arrange the columns’ order.

hidden—Describes an Event that you have made invisible by choosing the Hide command from the Event’s right-click menu.

Holiday—An Event type that spans an entire day, rather than being attached to a specific time on that day.

import—A function that translates Calendar or Address Book information saved in a text file into Event or Contact information that is copied into your Eudora Planner database.

Link fields—In the Contact Details dialog box, the five changeable fields that contain phone numbers, e-mail addresses, and Web site addresses. You can click on the icon next to a Link field to create a Call Event for a Contact, send an e-mail message, or launch your Internet browser to open a Web page.

Messaging Application Programming Interface (MAPI)—The standard interface that allows e-mail clients to pass information to an e-mail messaging service. An e-mail package must be MAPI-compliant in order to work with Eudora Planner’s e-mail features.

merge document—A document (either a letter or fax) that is intended to be sent to more than one Contact. A merge document usually contains *merge fields*, which allow the document to contain personalized information for each recipient. See *merge field*.

merge field—A placeholder that you can insert in a text document that is replaced by actual Contact data when the document is printed or faxed.

overdue —A term referring to a dated To-Do or Call that has not been completed by its due date. You can view overdue To-Dos and Calls in the To-Do List by selecting the Overdue option in the *To-Do and Call Filter*.

personal Contact—A Contact that appears only in your Address Book. Personal Contacts are assigned only private Categories, and therefore cannot be view by other users over the network (compare with *workgroup Contact*).

personal Event—An Event that appears in your Calendar only. Personal Events are assigned only Private Categories, and therefore cannot be viewed by other users over the network (compare with *workgroup Event*).

plugin—A small, specialized application designed to enhance and work within the framework of a larger application. You can access Eudora Planner plugins from the shortcuts pane.

preferences—A set of user-definable criteria allowing you to specify how certain functions of Eudora Planner will work and determine the appearance of the Address Book and Calendar.

priority—A level of importance that you can assign to a To-Do or Call. Eudora Planner allows you to define up to ten priorities and assign them freely to individual Events.

private Category—A Category that is stored in your personal, local database and is not shared over the network or visible to other users (compare with *public Category*).

proxy—a user who is selected by another user to act on his or her behalf in scheduling meetings and accepting or declining invitations to meetings.

public Category—A shared Category that is stored on a workgroup server, and that contains public Events or Contacts. Public Categories, and the public Events they contain, are available to all users on the network (compare with *private Category*).

QuickAccess—A suite of three small, background applications that allow you to view and add to your Calendar and Address Book information without having to open Eudora Planner. See *QuickContact*, *QuickDay*, and *QuickPad*.

QuickContact—A small, background application that gives you access to information in your Address Book without having to open Eudora Planner. QuickContact lets you view all your Contacts or search for specific ones, dial and send e-mail messages, and create new Contacts and Events. You can open QuickContact from the Windows taskbar.

QuickDay—A small, background application that gives you access to information in your Calendar without having to open Eudora Planner. QuickDay lets you view any day's activities and create new Events and Contacts. You can open QuickDay from the Windows taskbar.

QuickNet—A Eudora Planner feature that uses the search capabilities of the World Wide Web to find information about a Contact, such as Zip+4, e-mail addresses, white pages listing, and a street map to the Contact's address.

QuickPad—A pop-up menu located on the Windows taskbar that allows you to create new Events and Contacts without having to open Eudora Planner.

reminder—An alert of an upcoming Event in the form of an Alert Dialog, a flashing Event title in the menu bar, or a sound. You can set a Reminder for any Event in your Calendar, including Public Events.

repeating Event—One of a series of Events that you have configured to repeat at a specified interval and for a specified number of occurrences.

server—See *workgroup server*.

shortcut—In Eudora Planner, a program icon that points to another application or document or to a Web site. When you double-click the icon, the application or document is opened or, in the case of a Web site, your browser is launched and opens the appropriate site.

shortcuts pane—An area in the Eudora Planner window that contains shortcuts to other applications and documents, as well as plugins. The shortcuts pane can be moved or hidden from view.

sort—A function available in the Address Book List View allowing you to define the order in which Contacts are listed.

Special Event—An Event type that spans an entire day, rather than being attached to a specific time on that day.

Sticky Note—An Event type that appears as a movable object in the Month View. Sticky Notes can be used to display short lists or important notices.

style—1) A set of criteria for defining the appearance of your Calendar and Address Book views. You can create multiple styles and assign them to different Tabs, so that each Tab has a distinctive appearance. 2) Font and color settings applied to specific Categories, to give the Events and Contacts belonging to those Categories a distinctive appearance.

Tab—A method for organizing and displaying Calendar and Address Book Categories that are related to each other or contain similar information.

Telephony Application Programming Interface (TAPI)—A standard interface that allows an application to send commands to telephone hardware. Your modem or dialing device must be TAPI-compliant in order for you to use Eudora Planner's dialing feature.

template—1) For printing in Eudora Planner, a predefined set of formatting specifications that determines the appearance of printed output. A print template specifies the page size, margins, text formatting and other aspects of your output. 2) A predefined set of Contact or Event information that you can use to create multiple Events or Contacts that use similar information. Event and Contact templates are defined and used from the Insert menu.

To-Do—An Event type that represents a task to be completed. A To-Do can optionally have Start and Due dates, but is undated by default. An undated To-Do is carried forward to subsequent days until marked as completed. A dated To-Do also is carried forward until marked completed, but is visible only on the range of days from its Start and Due dates.

To-Do and Call Filter—A Calendar feature that lets you determine which To-Dos and Calls appear in the To-Do List. You can filter To-Dos and Calls based on a variety of criteria, including due date, completion status, and overdue status. To use this feature, right-click in the area above the To-Do List or in any empty cell in the To-Do List.

To-Do List—An area of the Calendar in which you can view, track, and create To-Dos and Calls. You can use the To-List to sort To-Dos and Calls by title, Category, priority, due date, and completion date.

view—A graphic environment provided by Eudora Planner within which you can view, modify, and create Events and Contacts. For example, the Month View is one of the available Calendar Views. The List View is one of two available Address Book Views.

workgroup Contact—A Contact that has been assigned a public Category, and thereby made available to other users on the network (compare with *personal Contact*).

workgroup Event—An Event that has been assigned a public Category, and thereby made available for viewing to all users on the network (compare with *personal Event*).

workgroup server—A program that runs on a network file server, which stores and maintains public Categories, allowing users to share Event and Contact information.

Web Publisher—A Eudora Planner plugin that lets you export Event and Contact information to HTML, enabling you to automatically publish Web pages based on the contents and look of your Calendar and Address Book.

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