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Eudora Planner™
Administrator's Guide

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Introduction

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

Eudora Group Planner is the multi-user version of Eudora Planner. Workgroups that use Eudora Group Planner can selectively share calendars, contacts and to-do lists over a 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 automatically notifies invitees of new meetings or schedule changes, and indicates which users have accepted or declined.

About This Guide

This guide describes how to plan, set up, and maintain a multi-user, networked Eudora Group Planner installation using both Power Macintosh® computers and PCs running Windows 95 or Windows NT.

How to Use This Guide

This guide can help you set up a Eudora Group Planner workgroup installation that suits the needs of your organization. Its goal is to help you consider all factors involved in planning the installation, and then guide you through the steps involved in setting it up. It can also aid you in modifying and maintaining your Eudora Group Planner workgroup as the personnel and requirements of your organization change.

To install and maintain Eudora Group Planner, you should be familiar with TCP/IP, your network topology, with the Windows 95 or Windows NT operating system from Microsoft® or Mac OS operating system from Apple®, and with the business functions and security considerations governing the users who will be accessing

information from Eudora Group Planner.

The procedures in this guide assume that you are familiar with Windows 95 or Windows NT or with Mac OS System 7.6.1 or later. If you're new to the operating environment you're using, please refer to the appropriate user's guide for more information.

Conventions Used in the Guide

This guide 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 right-click an item in Windows to see a shortcut menu that contains commands you can use on the item.

Used to indicate that you can control-click an item on the Macintosh to see a contextual menu that contains commands you can use on the item.

Chapter 1

Planning your Eudora Group Planner Installation

There are many factors to consider before you install Eudora Group Planner throughout your network. This chapter familiarizes you with these issues to prepare you for the task at hand.

System Requirements for a Eudora Group Planner Server

Any Windows 95, Windows NT 4.0, or Power Macintosh computer that can run Eudora Planner can host a Eudora Group Planner server. The only additional requirement is that the computer hosting the Eudora Group Planner server must have a static Internet Protocol (IP) address assigned.

Windows PC Requirements

More specifically, to install and use a Eudora Group Planner server on a PC, 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 and 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.

- A static IP address.

Macintosh Requirements

To install and use a Eudora Group Planner server on a Macintosh, you need

- A Power Macintosh or equivalent
- Mac® OS System 7.6.1 or later
- Open Transport 1.1 or later
- 16 MB of RAM
- 25 MB of hard disk space
- A CD-ROM drive
- A static IP address

About Eudora Group Planner Servers

Every installation of Eudora Planner has a Eudora Planner server running as its core element. This Eudora Planner server manages the Event and Contact data for the application. In each Eudora Planner installation, this server functions as one of two types: *local* or *workgroup*.

On most end user's computers, the Eudora Planner server is a *local* server—a stand-alone server that manages those Contacts and Events that reside in the user's local, personal Eudora Planner database. Other Eudora Planner users cannot connect to this local server or view data in the local database.

Each local Eudora Planner server has the potential to connect to—and integrate with—remote, *workgroup* Eudora Planner servers via TCP/IP.

If you want to have your users share Eudora Planner data using Eudora Group Planner, you must install a workgroup server on at least one computer on your network. The workgroup server acts as the hub in a wheel of users, connecting all to a central, shared database of public Contacts, Events, and categories. You can install multiple workgroup servers, depending on your needs. You can also install workgroup servers on desktop computers—a dedicated file server is not required; any Windows 95, Windows NT 4.0, or Power Macintosh computer that can run Eudora Planner can host a Eudora Group Planner server.

For group scheduling to work effectively, it is important for each user to specify a *home* server. The home server tracks all Events a user is attending, has declined, or has been invited to, as well as the general hours of availability defined for them, and makes this information available to other users. Each user must specify a home server, even if there is only a single shared, workgroup server. Normally, all users should make the workgroup server their home server.

You must create user accounts on the workgroup server before it can be used for group scheduling. Users will not be able to log in to a workgroup server unless there is an account created there for them.

Planning Your Server Setup

This section describes your options in choosing a server arrangement to suit your workgroup.

! *All Eudora Group Planner servers must be assigned a permanent, static IP address.*

Server Scenarios

The number of users that will be using Eudora Planner, and the ways that they are organized, will help you determine the best server setup for your workgroup. There are three major types of workgroup server arrangements:

- Single, dedicated workgroup server
- Multiple, dedicated workgroup servers
- Workgroup server residing on a user's computer

The following sections discuss these possible configurations, and list the benefits and limitations of each one.

Single, Dedicated Workgroup Server

In this arrangement, all Eudora Group Planner users share Events and Contact information through a single workgroup server. This is the simplest and easiest-to-manage solution, and the one most suited to the needs of most Eudora Planner workgroups.
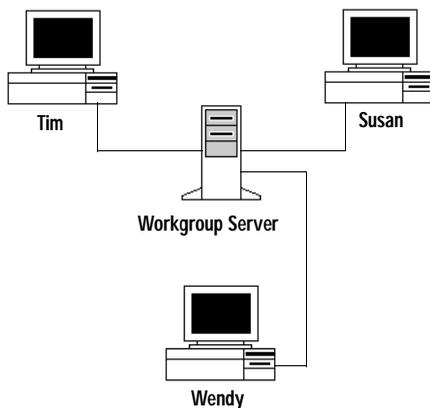
By placing the Eudora Group Planner server on a dedicated network file server, you can be sure that it is provided as stable an operating environment as your other network applications. The advantages of the centralized, dedicated server are that it is easier to manage, more secure, and can generally provide better performance in a workgroup.

The main disadvantage of this arrangement is that it does require a dedicated machine. If you are in a small orginization that doesn't have a dedicated file server computer, you may prefer the arrangement described in .

Multiple Dedicated Workgroup Servers

If you are in a larger organization, or have more complex organizational or security needs, your Eudora Group Planner may be more suited to an arrangement using multiple workgroup servers.

The size, organization, and security requirements of your organization will determine how many servers you require.
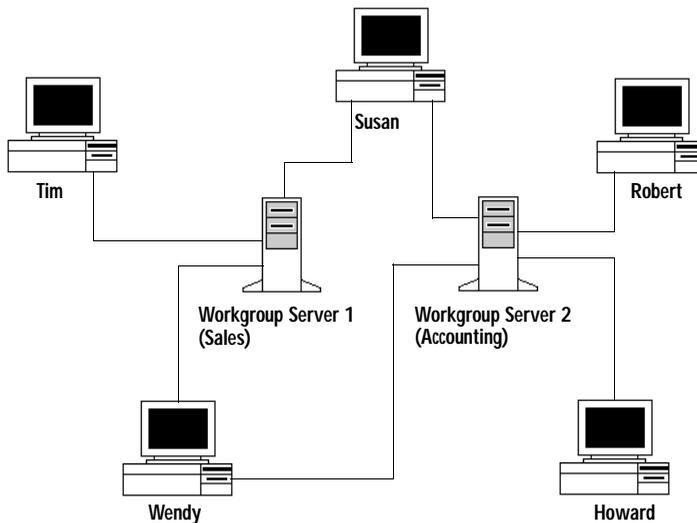
Additional workgroup servers can help spread a large amount of Event and Contact data over more computer processing power, resulting in faster performance for Eudora Group Planner in general. It also can provide better security, as sensitive data can be separated off onto computers to which only specific users can access—with the added benefit that the data so separated resides only on the server resources already dedicated to that group of users.

Of course, with the added complexity of such an arrangement comes trade-offs such as increased difficulty in finding particular information.

Workgroup Server on a User's Computer

For small workgroups in which a dedicated Eudora Group Planner server is not feasible, schedule and contact sharing is still possible by installing the workgroup server on a user's desktop computer.
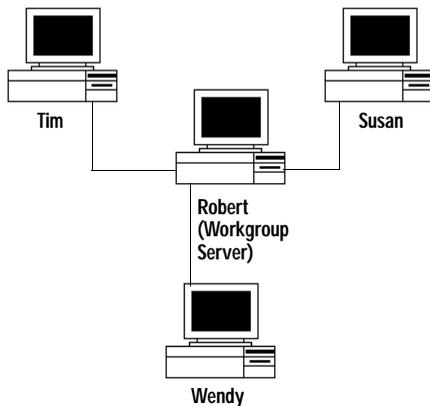
In this scenario, the the computer that hosts the Eudora Group Planner server is still available full-time for performing other computing tasks.

Planning Eudora Planner Security

As administrator for the Eudora Planner workgroup, it is your responsibility to set up and maintain the security of the Eudora Planner data being accessed. Eudora Planner has a powerful, flexible set of access permissions designed to let you provide the right information to the right users.

Access permissions created on a Eudora Planner server affect only those Events, Contacts, and categories residing on that server. If you are installing multiple workgroup servers in your organization, you must set up access permissions for all users on each server, regardless of whether those users have had permissions assigned to them on other servers.

There are two categories of access permissions in Eudora Planner: *privacy* and *security*. The category that most concerns you as administrator is *security*. However, because it is something you should be aware of, you should also understand the *privacy* permissions as well.

Privacy Permissions

Privacy permissions apply to individual Events and Contacts, and determine whether an Event or Contact created by a particular user can be modified or deleted by another. They provide a method by which users can allow or prevent others from viewing or changing the Events and Contacts they create. Eudora Planner allows users to define unique privacy permissions for each Event and Contact they create, provided that you enable this ability by granting them the *security* permission of

"change privacy." You can define default privacy settings for the new Events and Contacts that each individual user creates, or you can let your users set these defaults themselves.

Instructions for changing privacy permissions are discussed in the *Eudora Planner User's Guide*.

There are five different types of privacy permissions:

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.

Security Permissions

Like privacy permissions, *security* permissions affect groups of users as well as individuals. They govern each user's 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.

As the Eudora Planner administrator, you can grant or deny any or all of seven different types of 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.
Delete Contacts and Events	Delete Contacts and Events on the server.
Change privacy for Contacts and Events	Grant other Eudora Planner users permissions for this user's Events and Contacts.
Create/Modify categories and custom fields	Add or change categories and custom fields stored on the server.

Permission Type	When granted, lets the user...
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.

Because they can be assigned to both users and groups, security permissions can be set in multiple places for a single user. When this happens, any particular permission that is turned off, or disabled, overrides other settings for the same permission that is turned on, or enabled. For example, imagine that a user, Judy, is assigned to a user group called Sales. As manager of the sales department she is granted all possible permissions at the user level. However, because other users in the Sales group are not at her level, the permissions to manage users and groups and to take ownership of Contacts and Events are not enabled for that group. In this case, because she belongs to a group that does not have these two permissions, she does not have them as an individual user.

⚠️ *When you are logged in as the administrator, you are granted all of the security permissions. The remainder of this book contains procedures that can only be performed by someone having the appropriate permissions. In these instances, it is assumed that you are logged in as the administrator.*

For directions on setting security permissions on Windows 95 and Windows NT servers, see "Granting Security Permissions in Windows" on page 12. For directions on setting security permissions on Macintosh servers, see "Granting Security Permissions on the Macintosh" on page 20.

How Privacy and Security Permissions Work Together

As both security and privacy permissions have Delete and Modify permissions that could possibly conflict, it's important to understand how the two types of permissions interact.

Eudora Planner permissions define the *potential* actions of a user or group. For example, if Joe has the Delete *security* permission, he *may* be able to delete Events and Contacts on the workgroup server—that is, he can delete any Event or Contact that has a *privacy* permission that allows him to delete it. If he does not have Delete permission, then he is *never* allowed to delete Events and Contacts.

The following table illustrates the relationship between the privacy and security permissions for Delete and Modify.

		Server Security Permissions	
		Yes	No
Privacy	**Yes**	Allowed	Not allowed
Permissions	**No**	Not allowed	Not allowed

Chapter 2

Configuring a Eudora Group Planner Server for Windows

This chapter describes the steps involved in setting up a workgroup server on a computer running Windows 95 or Windows NT. It explains how to:

- Install and set up a Eudora Group Planner server
- Define users and groups of users on the server
- Grant access rights to those users and groups
- Create workgroup categories
- Manage data on the server remotely

Installing the Eudora Group Planner Server

Installation of Eudora Planner server for Windows is the same whether you are installing a personal or workgroup server. The only difference is in the installation software you use.

To install a Eudora Group Planner server:

1. Insert the CD-ROM.

2. From the Start menu, select **Run**.

3. Type **D:\GPlanner\Setup.exe**

   where *D* represents your CD-ROM drive's volume.

   The Eudora Planner installation program launches.

4. Follow the instructions provided by the installer to complete the installation.

By default, the Eudora Planner installation program assigns the host computer's Windows name as the name of the Eudora Planner server. If this name is not likely to be recognizable to your users, then you should change it to a name that will be

more obvious to them. To do this, select **Servers** from Eudora Planner's **Tools** menu. In the Servers dialog box that appears, right-click on the server's default name and select **Properties** from the pop-up menu that appears. The Server Properties dialog box appears, in which you can type a new name for the server.

Configuring Users and Groups

Before your Eudora Group Planner users can log in to the workgroup server, you must create a user account for each user. Additionally, you can create groups on the workgroup server to better manage large numbers of users.

Creating User Accounts

At minimum, a user account consists of a user's name and the set of permissions granted to that user. If necessary, you can also add contact information, such as a user's physical address, email address, and phone number, to a user account. You can also assign the user to groups, which are described in "Creating and Populating Security Groups" on page 11, or set up proxies for the user, as explained in "Assigning User Proxies" on page 13.

To create a user account on a workgroup server:

1. From the **Tools** menu, choose **Users and Groups**.

   The Users and Groups dialog box appears.

2. From the drop-down **Server** list, select the name of the workgroup server.

3. Click **New User**.

   The User Properties dialog box appears.

4. Specify a user name in the **User Name** box. Then, specify other, optional information as necessary:

   • On the **General** tab, type in Contact information for this new user.

   • On the **Groups** tab, select the security groups that this user will belong to. See "Creating and Populating Security Groups" on page 11 for information.

   • On the **Password** tab, type a password, then type it again to confirm it.

   • On the **Privacy** tab, define the privacy settings for this user. For information on these privacy settings, see "Granting Security Permissions in Windows" on page 12.

   • On the **Advanced** tab, select a home server for this user. Then, click the Security and Proxies buttons to define access permissions and proxies for this user. For information on security and proxy settings, see "Granting Security Permissions in Windows" on page 12.

5. When you've finished setting up this user in the User Properties dialog box, click **OK** to return to the Users and Groups dialog box.

6. Repeat steps 3 through 5 to add additional users.

7. Click **OK** when you're finished.

Importing Users

If you need to set up a lot of users, you can import a list of users from a text file using the Import button on the Users and Groups dialog box. This text file must have the following format:

firstname lastname
firstname lastname
firstname lastname
...

You can also import users from those registered in Windows.

To import users in a text file:

1. From the **Tools** menu, choose **Users and Groups**.

   The Users and Groups dialog box appears.

2. From the drop-down **Server** list, select the server for which you want to create users.

3. Click **Import**.

   The Import Users dialog box appears.

4. Select the type of import you want to perform.

   • To import users from Windows, click the **My Computer** option.
   • To import users from a text file, click the **Text file** option, then type a file name or click the **Browse** button to locate the text file using an **Open** dialog box.

5. Click **OK** to import the names.

Creating and Populating Security Groups

As the scale of your Eudora Group Planner user base expands, you may find that you can most efficiently manage users' permissions through the use of *groups*. A group is a subset of Eudora Group Planner users that share the same permissions for the workgroup server. When you assign a user to a group, the user acquires that group's workgroup server permissions (except in cases where you have individually denied the user a permission granted to the group, a scenario described in "Security Permissions" on page 6). Depending on the structure of your organization, you might create groups that correspond to departmental divisions, employee hierarchy, or even computer savvy amongst users.

To add a security group to a workgroup server:

1. From the **Tools** menu, choose **Users and Groups**.

   The Users and Groups dialog box appears.

2. From the drop-down **Server** list, select the server for which you want to create groups.

3. Click **New Group**.

   The Group Properties dialog box appears.

4. Specify a group name in the **Group Name** box. Then, specify other, optional information as necessary:

   • In the **Group Name** box, type a name for this group.

   • On the **Users** tab, add any existing users that you want to belong to this group.

   • On the **Advanced** tab, click the Security button to define access permissions for this group. For information on how group security settings affect individual user's security settings, see "Granting Security Permissions in Windows" on page 12.

5. When you've finished setting up this group in the Group Properties dialog box, click **OK** to return to the Users and Groups dialog box.

6. Repeat steps 3 through 5 to add additional groups.

7. Click **OK** when you're finished.

   The security groups you've created are saved to the Eudora Group Planner server. The permissions granted to the groups now apply to any users assigned to those groups.

Granting Security Permissions in Windows

Granting security permissions among your Eudora Group Planner users is a step that requires a little planning and consideration. Your organization, and the various roles of people in it, should suggest a logical scheme. Discussing the needs of key people in your organization may be helpful towards creating a scheme of permissions that is secure, yet flexible. See "Security Permissions" on page 6 for more information on security permissions.

To assign or change access permissions:

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 server for which you want to define permissions.

3. In the **Users and Groups** area, click the plus sign next to **Users**.

   A list of the users residing on the server appears.

4. Select a user's name, then click **Details**.

   The User Properties dialog box appears.

5. Select the **Advanced** tab, then click the **Security** button.

    The Security dialog box appears, displaying the permissions assigned for this user.

6. Select the permissions appropriate to this user, then click **OK** to close the Security dialog box.

7. Repeat steps 4 through 6 to grant permissions to other users.

Assigning User Proxies

In Eudora Group Planner, a *proxy* is a user that can act on behalf of another user, whether in the creation of shared Events and Contacts or by handling items related to group scheduling. To demonstrate the benefits of Eudora Group Planner's proxy feature, we'll use the fictitious situation of Katrina, a sales manager, and Valerie, her administrative assistant.

As Katrina's assistant, Valerie is responsible for maintaining Katrina's Eudora Group Planner Calendar and Address Book. Katrina therefore designates Valerie as her proxy, which enables Valerie to log in with Katrina's user name. Once she has logged in as Katrina, Valerie can view all of Katrina's workgroup Events and Contacts, as well as create new workgroup Events and Contacts that show Katrina as the last modifier. Valerie can also accept and decline meeting invitations on Katrina's behalf. Valerie cannot, however, see Katrina's local Events and Contacts.

As the workgroup server administrator, you can assign proxies to any users in the Eudora Group Planner workgroup. The users themselves can also add proxies to their own user accounts

To assign a proxy to a user:

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 user for whom you want to assign a proxy, 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 assign as a 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 user you selected to be proxy is now able to log in as the user selected in step 3.

Creating Categories for the Workgroup Server

Each Eudora Group Planner server is installed with several predefined categories for use in grouping related Events and Contacts. Still, if there are special needs in your organization for additional categories—for example, ones specific to clients, projects, or other elements of your business—now is a good time to create them.

See Chapter 4 of the *Eudora Planner User's Guide* for more information on categories and general organization in Eudora Planner.

To create a category:

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

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

2. Click **New**.

    The Category Properties dialog box appears.

3. In the **Name** box, type a name for the category.

    > ! *While you can assign Font and Background Color settings to give the category a distinctive appearance, doing so will affect the way the category appears only on the server computer. Users connected to the server remotely will see the category according to how it is set to appear on their computers..*

4. Click **OK**.

    Eudora Planner adds the category to the Categories list.

Creating Custom Fields for the Workgroup Server

The Eudora Group Planner workgroup server comes installed with number of Address Book custom fields, but you can create additional custom fields to make available for your users. The custom fields you create on a workgroup server can be assigned only to the Contacts residing on that server. They are not available in the Custom Fields area of Contacts residing in users' local databases. For more information about custom fields, see Chapter 3 of the *Eudora Planner User's Guide*

To create a custom field for the 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.

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 information about field types, see Chapter 3 of the *Eudora Planner User's Guide*.

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.

Chapter 3

Configuring a Eudora Group Planner Server for Macintosh

This chapter describes the steps involved in setting up a workgroup server on a Macintosh computer. It explains how to:

- Install and set up a Eudora Group Planner server
- Define users and groups of users on the server
- Grant access rights to those users and groups
- Create workgroup categories
- Remotely manage data on the server
- Import existing data sources onto the server

If you are upgrading to Eudora Group Planner from Now Up-toDate and Contact version 3.6.5, be sure to read te sections on upgrading at the end of this chapter.

Installing the Eudora Group Planner Server

The procedure for installing Eudora Group Planner is the same whether you are installing a client or workgroup server; the only difference is in the installation software you use.

To install a Eudora Group Planner server:

1. Insert the CD-ROM.

2. Double-click the Eudora Group Planner Server Installer.

3. Select an installation option, then click **Install**.

4. Choose a destination folder for installation, then click **Install**.

   The Eudora Group Planner server is installed at the destination you've specified.

Configuring Users and Groups

Before your Eudora Group Planner users can log in to the workgroup server, you must create a user account for each user. Additionally, you can create groups on the workgroup server to better manage large numbers of users.

Creating User Accounts

At minimum, a user account consists of a user's name and the set of permissions granted to that user. If necessary, you can also add contact information, such as a user's physical address, email address, and phone number, to a user account. You can also assign the user to groups, which are described in "Creating and Populating Security Groups" on page 19, or set up proxies for the user, as explained in "Assigning User Proxies" on page 20.

To create a user account on a workgroup server:

1. From the **Define** menu, select **Users and Groups**.

    The Users and Groups dialog box appears.

2. From the **Servers** pop-up menu, select the name of the workgroup server, if it does not already appear.

3. In the **User Name** area, click **New**.

    The Edit User dialog box appears, displaying the Contact tab.

4. Type a user name in the **Name** boxes, then enter other, optional information as necessary:

    • On the **Contact** tab, type in contact information for this new user. If this information can be found in an existing Contact, it will be filled in automatically.

    • On the **Groups** tab, select the security groups that this user will belong to. See "Creating and Populating Security Groups" on page 19 for information.

    • On the **Password** tab, specify, and confirm, a password for the user. This is necessary only if, on the Rights tab, you specify that the user must enter a password before logging in.

    • On the **Rights** tab, select the appropriate server permissions for this user. Also, specify whether the user must enter a password before logging in to the server. By default, new users are granted permission to access a remote server if their user license permits it.

    • On the **Privacy** tab, define the privacy settings for this user. For information on these privacy settings, see "Granting Security Permissions on the Macintosh" on page 20.

    • On the **Proxies** tab, define any proxies needed by this user. For information on proxy settings, see "Assigning User Proxies" on page 20.

5. When you've finished setting up this user account in the User Properties dialog box, click **OK** to return to the Users and Groups dialog box.

6. Repeat steps 3 through 5 to add additional users.

7. When you've finished adding users, click **OK**.

    The user accounts and related settings are saved to the workgroup server. Also, a Contact is added to the server's Address Book listing for this user, if one did not exist already.

    The Eudora Group Planner users you added are now able to log in to the server with user names you created. You can change the user information you've entered here at any time.

Creating and Populating Security Groups

As the scale of your Eudora Group Planner user base expands, you may find that you can most efficiently manage users' permissions through the use of *groups*. A group is a subset of Eudora Group Planner users that share the same permissions for the workgroup server. When you assign a user to a group, the user acquires that group's workgroup server permissions (except in cases where you have individually denied the user a permission granted to the group, a scenario described in "Security Permissions" on page 6). Depending on the structure of your organization, you might create groups that correspond to departmental divisions, employee hierarchy, or even computer savvy amongst users.

To add a security group to a workgroup server:

1. From the **Define** menu, select **Users and Groups**.

    The Users and Groups dialog box appears.

2. From the **Servers** pop-up menu, select the server for which you want to create group.

3. In the **Group Name** area of the dialog box, click **New**.

    The Edit Group dialog box appears.

4. Enter a group name in the **Group Name** box. Then, specify other information as necessary:

    • On the **Users** tab, select a user name, then click **Add** to assign that user to this group.

    • On the **Rights** tab, select options to define the security permission for the group. For information on how group security settings affect individual user's security settings, see "Granting Security Permissions on the Macintosh" on page 20.

5. When you've finished setting up this group in the Edit Group dialog box, click **OK** to return to the Users and Groups dialog box.

6. Repeat steps 3 through 5 to add additional groups.

7. Click **OK** when you've finished.

   The security groups you've created are saved to the Eudora Group Planner server. The permissions granted to the groups now apply to any users assigned to those groups.

Granting Security Permissions on the Macintosh

Granting security permissions among your Eudora Group Planner users is a step that requires a little planning and consideration. Your organization, and the various roles of people in it, should suggest a logical scheme. Determining the needs of key people in your organization may be helpful towards creating a scheme of permissions that is secure, yet flexible. See "Security Permissions" on page 6 for more information on security permissions.

To assign or change access permissions:

1. From the **Define** menu, select **Users and Groups**.

   The Users and Groups dialog box appears.

2. From the **Servers** pop-up menu, select the server for which you want to define permissions.

   A list of the users residing on the server appears.

3. Select a user's name, then click **Edit**.

   The Edit User dialog box appears.

4. Select the **Rights** tab.

5. Select the permissions appropriate to this user, then click **Done** to close the Edit User dialog box.

6. Repeat steps 3 through 5 to grant permissions to other users.

Assigning User Proxies

In Eudora Group Planner, a *proxy* is a user that can act on behalf of another user, whether in the creation of shared Events and Contacts or by handling items related to group scheduling. To demonstrate the benefits of Eudora Group Planner's proxy feature, we'll use the fictitious situation of Katrina, a sales manager, and Valerie, her administrative assistant.

As Katrina's assistant, Valerie is responsible for maintaining Katrina's Eudora Group Planner Calendar and Address Book. Katrina therefore designates Valerie as her proxy, which enables Valerie to log in with Katrina's user name. Once she has logged in as Katrina, Valerie can view all of Katrina's workgroup Events and Contacts, as well as create new workgroup Events and Contacts that show Katrina as the last modifier. Valerie can also accept and decline meeting invitations on Katrina's behalf. Valerie cannot, however, see any Events and Contacts on Katrina's computer that are not shared.

As the workgroup server administrator, you can assign proxies to any users in the

Eudora Group Planner workgroup. The users themselves can also add proxies to their own user accounts

To assign a proxy to a user:

1. From the **Define** menu, select **Users and Groups**.

    The Users and Groups dialog box appears.

2. In the **User Name** area, select the name of the user to whom you want to assign a proxy (the proxied user), then click **Edit**.

    The Edit User dialog box appears.

3. Click the **Proxies** tab to make it the active tab.

4. In the **Not Proxies** list, select the user that you want to act as the proxy. Then, click **Add**.

    The selected user's name is added to the Proxies list.

5. Click **Done** to return to the Users and Groups dialog box. Then, click **Done** again to close this dialog box.

    The user you selected to be proxy is now able to log in as the user selected in step 2.

Creating Categories for the Workgroup Server

Each Eudora Group Planner server is installed with several predefined categories for use in grouping related Events and Contacts. If there are special needs in your organization for additional categories—for example, ones specific to clients, projects, or other elements of your business—now is a good time to create them.

See Chapter 4 of the *Eudora Planner User's Guide* for more information on categories and general organization in Eudora Group Planner.

To create a category:

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

    The Edit Categories dialog box appears. Available servers and their respective categories appear in a list.

2. In the **Available Categories** list, select the server to which you want to add the category. Then, click **New**.

    The Category dialog box appears.

3. In the **Name** box, type a name for the category.

4. To give the category a distinctive appearance, select a font by clicking the **Font** pop-up menu. Specify the font size and color in the **Size** and **Color** boxes and then choose a font style by selecting a check box. Select a **Justify** option. When you finish, click **OK**. The settings you select here will only affect Events or Contacts having this category as their primary category (see the *Eudora*

Planner User's Guide for information about primary categories).

5.   Click **OK**.

Eudora Group Planner adds the category to the Available Categories list. This category is available to any user logged in to the workgroup server.

Creating Custom Fields for the Workgroup Server

The Eudora Group Planner workgroup server comes installed with number of Address Book custom fields, but you can create additional custom fields to make available for your users. The custom fields you create on a workgroup server can be assigned only to the Contacts residing on that server. They are not available in the Custom Fields area of Contacts residing in users' local databases. For more information about custom fields, see Chapter 3 of the *Eudora Planner User's Guide*

To create a custom field for the workgroup server:

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

The Custom Fields dialog box appears.

2.   Select a server from the **Servers** pop-up menu.

3.   Click **New**.

The Custom Field dialog box appears.

4.   Enter a name for the Custom Field in the **Name** box.

5.   Click the **Type** pop-up menu to select a field type for the custom field. For information about field types, see Chapter 3 of the *Eudora Planner User's Guide*.

6.   Click **OK** to close the Custom Field dialog box, then click **OK** to close the Custom Fields dialog box.

The custom field is saved to the workgroup server and appears in the Custom Fields area of any Contact stored on that server.

Upgrading from Now Up-to-Date and Contact for Macintosh

This section contains important information for organizations that are migrating from Now Up-to-Date and Contact versions 3.6.5 for Macintosh to Eudora Group Planner. If your organization currently uses Now Up-to-Date and Contact 3.6.5 to share Events and Contacts over a network, you should read this section thoroughly before beginning to migrate to Eudora Planner.

A Now Up-to-Date server contains information necessary for group scheduling, such as user login names and records of users' blocked time. The instructions contained here explain how to import your Up-to-Date server while preserving that data for Eudora Planner. By following these instructions, you will save time in

entering user names and enable your users to immediately start using Eudora Planner for group scheduling—just as they did Up-to-Date.

Before you begin to migrate, you should know what information Eudora Planner actually imports from Now Up-to-Date and Contact.

What Transfers from a Now Up-to-Date File

Eudora Planner's Up-to-Date import feature imports the following:

- All standard Event fields, such as Title, Start Date, Start Time, and Duration
- All Event Categories
- Information in the Description area
- Records of users' blocked time
- All user names (Public Event Server only)

The following are *not* imported:

- Priority settings
- Attachment information

What Transfers from a Now Contact File

Eudora Planner imports the following data from Now Contact:

- Every Contact field, including the custom fields. Because Eudora Planner supports an unlimited number of custom fields, even custom field titles are transferred.

- Although the primary Email field is a custom field in Contact, it is mapped to Eudora Planner's standard Email field during importation. Any secondary Email fields in Contact are mapped to Eudora Planner's custom fields.

- Comments, Notes, and QuickContact designation. The QuickContact designation also appears as a Category.

- Keywords transfer as Categories.

Eudora Planner does *not* import any attachment information

Migrating from Now Up-to-Date for Macintosh

Migrating from Now Up-to-Date to Eudora Group Planner entails more than just importing Public Event Server data into the Eudora Group Planner workgroup server and then letting users connect to the new server. An Up-to-Date server contains important information necessary for group scheduling, such as user login names and records of users' blocked time. Because of factors related to this, you must follow a step-by-step procedure that requires you to coordinate migration of the server data with that of the data in each user's Up-to-Date database.

⚠ *The instructions for upgrading from Now Up-to-Date for Macintosh must be followed exactly as described here. Any variation on this procedure can result in duplication of data and the loss of users' time blocks and reminders.*

To upgrade a workgroup from Now Up-to-Date for Macintosh:

1. Open the Eudora Group Planner server. From the **File** menu, select **Import**, then select **Public Event Database** from the submenu that appears.

    The Open dialog box appears.

2. Navigate to find the Now Up-to-Date for Macintosh server database that you want to import, select it, then click **Open**.

    The database is imported into the Eudora Group Planner server. The import transfers all Events, category names, user names, and resources stored in the databases, and preserves reminders for Public Events and user's time block information.

3. Have the Eudora Planner users connect to the workgroup server, log in with their user names, and set the workgroup server as their home server as described in "Giving Users Access to the Workgroup Server" on page 29.

4. Have each user import his or her own Now Up-to-Date database into the Eudora Planner client.

    The import brings in only local Events stored in Now Up-to-Date, preserving any reminders and time blocks associated with those Events. Public Events are not transferred during this import; Public Events are transferred when you import the Public Event database.

Importing Data from a Now Contact Server

Most Contact data is transferred, including all standard field data, category names, notes, and custom field names. Keywords are imported as Eudora Planner categories.

To import data from a Now Contact server:

1. From the **File** menu, select **Import**, then select **Public Contact Database** from the submenu that appears.

    The Open dialog box appears.

2. Navigate to find the Now Contact server database you want to import, select it, then click **Open**.

    A progress bar appears, indicating the status of the import. Once the import is complete, Contact information appears in the Address Book. All Contact information is imported, except for attached Events, documents, and aliases.

Importing Data from a Now Up-to-Date or Contact Client File

When you import from an Now Up-to-Date or Contact client file, only Private data is transferred.

To import from Now Up-to-Date and Contact:

1. From the **File** menu, select **Import**. Then, from the resulting submenu, select either Now Up-to-Date Database or Now Contact Database.

   The Open dialog box appears.

2. Navigate to find the Now Up-to-Date or Now Contact database you want to import, then select it.

3. Click **Open**.

   A progress bar appears, indicating that Eudora Planner is importing data from the selected database. Once the import is complete, the data appears in Eudora Planner.

Chapter 4

Setting Up Eudora Planner for Windows Users

This chapter describes the steps involved in setting up each Windows user to access the workgroup server:

- Installing the Eudora Planner client
- Setting up users to access the workgroup server
- Setting the server update frequency

Installing Eudora Planner

Installation of Eudora Planner for Windows is the same whether you are installing a personal or workgroup server. The only difference is in the installation software you use.

To install a Eudora Planner client:

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.

Giving Users Access to the Workgroup Server

After you've set up the workgroup server, those users for whom you've created user accounts can connect to it, make it their home server, and begin sharing scheduling and contact information.

! *To connect to a workgroup server, each user must know either the IP address, fully-qualified domain name, or Windows' computer name for the server.*

Have each user do the following to connect to a Eudora Group Planner 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 Server Wizard as it guides them through the server connection process.

After users have logged in to a workgroup server, they can begin sharing Events and Contacts with other users. However, to take full advantage of group scheduling—to get meeting invitations and have their available time blocked by Events they are attending—they must designate a workgroup server as their *home* server. The home server tracks a user's schedule, noting which Events occupy the user's time, and broadcasts the user's availability to others who invite the user to a meeting.

Have each user do the following to assign or change the home server:

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

    The Servers dialog box appears.

2. Right-click on a server in the **Servers** list, then select home server from the pop-up list.

3. When the workgroup server login dialog box appears, type a user name and, if necessary, a password. Then, click **OK**.

4. Close the Servers dialog box.

Setting Server Update Preferences

Each user can set the frequency with which the Eudora Planner database on his or her computer receives updated Eudora Planner information from a workgroup server. He or she can also force an immediate update from a workgroup server.

Users can force an immediate update from all servers by clicking the Update All Servers button on the toolbar.

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 frequency, in minutes, with which your database receives updates from the server.

5. Click **OK**.

    The Eudora Planner client will now receive server updates from the workgroup server at the specified interval.

To force an update from a specific server:

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

    The Servers dialog box appears, listing all the servers to which this user is connected.

2. Double-click the server for which you wish to force the update.

    The Server Properties dialog box appears.

3. Click the **Update** tab.

4. Click **Update Now**.

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

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

Accessing Workgroup Data

A final step in the process of sharing Events and Contacts is to have each user subscribe to Categories of Events and Contacts that reside on the workgroup server. For information on these tasks, see the *Eudora Planner User's Guide*.

Chapter 5

Setting Up Eudora Planner for Macintosh Users

This chapter describes the steps involved in setting up each Macintosh user to access the workgroup server, including:

- Installing the Eudora Planner client
- Setting up users to access the workgroup server
- Setting the server update frequency

Installing Eudora Planner

The procedure for installing the Eudora Planner client is the same as for installing the workgroup server; the only difference is in the installation software used.

To install a Eudora Planner client:

1. Insert the CD-ROM.

2. Double-click Eudora Planner installer.

3. Select an installation option, then click **Install**.

4. Choose a destination folder for installation, then click **Install**.

    Eudora Planner is installed at the destination you've specified.

Giving Users Access to the Workgroup Server

After you've set up the workgroup server, those users for whom you've created user accounts can connect to it, make it their home server, and begin sharing scheduling and contact information.

To connect to a workgroup server, each user must know the IP address for the server.

Have each user do the following to connect to the Eudora Group Planner server:

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

   The Edit Servers dialog box appears.

2. Click **Add Servers**.

   The Internet Server Information dialog box appears.

3. Have the user enter the server's IP address into the **Internet (IP) Address** box. In the **Update Interval** box, the user should enter the frequency with which he or she wants to receive updates from the server.

After users have logged in to a workgroup server, they can begin sharing Events and Contacts with other users. However, to take full advantage of group scheduling—to get meeting invitations and have their available time blocked by Events they are attending—they must designate a workgroup server as their *home* server. The home server tracks a user's schedule, noting which Events occupy the user's time, and broadcasts the user's availability to others who invite the user to a meeting.

Have each user do the following to assign or change the home server:

1. From the **Define** menu, choose **Servers**.

   The Servers dialog box appears.

2. Select a server from the list, then click **Make Default**.

   The server you've selected appears in bold.

3. Click **Done**.

   The server the user has selected is that user's home server.

Setting Server Update Preferences

Each user can set the frequency with which the Eudora Planner database on his or her computer receives updated Eudora Planner information from a workgroup server.

Users can force an immediate update from all servers by clicking the Update All Servers button on the toolbar.

To set the server update frequency:

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

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

2. Select the server for which you wish to change the update frequency.

The Internet Server Information dialog box appears.

3. In the **Update Interval** box, type the frequency, in minutes, with which you want your database to receive updates from the server.

4. Click **OK**.

    Eudora Planner now receives server updates from the workgroup server at the specified interval.

To force the update of a specific server:

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

    The Edit Servers dialog box appears, listing all the servers to which this user is connected.

2. Select the server for which you wish to force the update.

3. Click **Update Now**.

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

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

Accessing Workgroup Data

The final step in the process of sharing Events and Contacts is to have each user subscribe to categories of Events and Contacts that reside on the workgroup server. For information on these tasks, see the *Eudora Planner User's Guide*.

Appendix A
User Configuration Worksheets

This appendix contains two worksheets for you to use in planning your Eudora Group Planner installation. You can use these worksheets to collect details about each individual user and to set up user groups.

QUALCOMM grants you permission to make multiple copies of these worksheets.

Eudora Planner User Planning Worksheet

User Details

Name: _____   Home address: _____

Dept.: _____   _____

Title: _____   _____

Phone: _____   Home phone: _____

Fax: _____   Other information: _____

Mobile: _____   _____

Email: _____   _____

URL: _____   _____

Privacy Permissions Granted to Other Users/Groups

User/Group name: _____   Read ☐   Modify ☐   Delete ☐   Take Ownership ☐
                                     Modify Access (to Events and Contacts) ☐

User/Group name: _____   Read ☐   Modify ☐   Delete ☐   Take Ownership ☐
                                     Modify Access (to Events and Contacts) ☐

User/Group name: _____   Read ☐   Modify ☐   Delete ☐   Take Ownership ☐
                                     Modify Access (to Events and Contacts) ☐

User/Group name: _____   Read ☐   Modify ☐   Delete ☐   Take Ownership ☐
                                     Modify Access (to Events and Contacts) ☐

User/Group name: _____   Read ☐   Modify ☐   Delete ☐   Take Ownership ☐
                                     Modify Access (to Events and Contacts) ☐

User/Group name: _____   Read ☐   Modify ☐   Delete ☐   Take Ownership ☐
                                     Modify Access (to Events and Contacts) ☐

User/Group name: _____   Read ☐   Modify ☐   Delete ☐   Take Ownership ☐
                                     Modify Access (to Events and Contacts) ☐

User/Group name: _____   Read ☐   Modify ☐   Delete ☐   Take Ownership ☐
                                     Modify Access (to Events and Contacts) ☐

Eudora Planner Group Planning Worksheet

Group name: _____

Group members:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Group permissions: Read ☐   Modify ☐ Delete ☐ Take Ownership ☐
Modify Access (to Events and Contacts) ☐