



Eudora Planner™ **User's Guide**

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Introduction

What Is Eudora Planner?

Eudora Planner is a schedule and contact management tool for Macintosh that provides flexible portability and simple data sharing in a package that is easy to learn and 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
- Handheld 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 control-click an item to see a contextual menu that contains commands you can use on the item.



Used to indicate complimentary features in QuickAccess.

Chapter 1

Getting Started

This chapter provides an overview of the key elements and concepts of Eudora Planner, including a general description of its features and components, a list of system requirements, and a procedure for installation.

Eudora Planner Features

The following sections describe Eudora Planner's components and major features.

The Calendar

Eudora Planner's Calendar is an organizer you can use to 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 email addresses, Web site addresses, and graphics to Events, as well as create links to Contacts in your Address Book. Eudora Planner's Calendar also contains a to-do list in which you can easily view, modify, and organize your tasks and calls.

The Address Book

The Eudora Planner Address Book helps you manage information about the individuals and companies you interact 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 email addresses. Contacts can also contain notes, links to associated Web sites, and attached documents created in other applications. The Address Book is fully integrated with the Eudora Planner Calendar, so that Events related to particular Contact can be physically linked to and opened from within that Contact.

Categories

Eudora Planner helps you organize and identify your Calendar and Address Book information through the use of *categories*. When you assign a category to an Event or Contact, you give it a label that shows its relationship to similar Events and Contacts. For example, you might assign a Calendar categories called Holidays to all company holidays in your schedule. You could likewise assign an Address Book category called Personal to any Contacts for friends and acquaintances. Eudora Planner installs a number of Calendar and Address Book categories, which you can use or delete as your needs dictate. You can also create categories specific to your own need. If you then apply different text styles and colors to your categories, you can tell at a glance which category an Event or Contact belongs to.

You can assign one or more categories to individual Events and Contacts. For example, you could assign only one category called Family to the Contact for a relative, whereas you might assign two categories, Business and Personal, to the Contact for a business associate who is also a friend.

If you use Eudora Planner in a workgroup environment, you can use and create both *private* and *public* categories. Private categories reside only on your Macintosh and are not available to other users; public categories, however, reside on a workgroup server and can be shared with other Eudora Planner users connected to that server. Once you've connected to a workgroup server, you can assign the public categories on that server to your own Events and Contacts, thereby making those items available to other Eudora Planner users. For more details about using Eudora Planner in a workgroup environment, see Chapter 8, "Using Eudora Group Planner," on page 109.

Tabs

Just as related Events and Contacts can be grouped by categories, so too can related categories be grouped together in *tabs*. A tab is a feature of the Eudora Planner window tabs provide a visual way to demonstrate the relationship between categories that contain the same kind of information. For example, you can create a *Vacation* tab that shows Events in your private Vacation category and also those in the public Holiday category on your company's server. Then, when you select the Vacation tab, you see all vacation Events that apply to you.

A tab can contain multiple categories, but one of those categories must be designated the *default* for that tab. The default category is automatically assigned to any Event or Contact you create when viewing that tab. Each tab has its own default category.

You can also create unique visual styles for each of your tabs, so you can quickly recognize which tab you are viewing.

QuickAccess

The QuickAccess tools give you access to your Eudora Planner data without actually having to open Eudora Planner. Both tools, QuickDay and QuickContact,

provide easy access to Calendar and Address Book information from the Macintosh menu bar. You can use QuickDay to view your schedule and add new Events. QuickContact lets you search for names and phone numbers on the fly and create new Contacts. Each tool also lets you launch Eudora Planner right from the menu bar.

Group Scheduling

In addition to being a personal planner, Eudora Planner lets you share scheduling and Contact information with other Eudora 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 Planner in a workgroup environment, see Chapter 8, "Using Eudora Group Planner," on page 109.

Installing Eudora Planner

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

System Requirements

- Power Macintosh or equivalent
- System 7.6.1 or later
- Open Transport 1.2
- 16 MB of RAM

Installation

To install Eudora Planner, double-click the Eudora Planner installer icon, then follow the directions provided by the installer.

The Eudora Planner installer installs items into two different locations on your system. The *Eudora Planner Folder*, which contains the Eudora Planner application files, is installed in a location that you choose before installation. Eudora Planner also installs a system extension called *Planner Quick Menu* into the Extensions folder.

Uninstalling Eudora Planner

If you at any time need to remove Eudora Planner from your system, you can do so by dragging Eudora Planner items to the system trash.

To uninstall by dragging Eudora Planner items to the trash:

1. On your system, locate the folder called *Eudora Planner Folder*.
2. Drag *Eudora Planner Folder* to the system trash can.



This contains your Eudora Planner data files. If you want to preserve these files, remove the subfolder called Eudora Planner Data from the Eudora Planner Folder before you drag the latter folder to the trash.

3. Open the Macintosh's **System Folder**, then locate and open the **Extensions** folder.
4. Locate the extension called **Planner Quick Menu** and drag it to the trash. Then, close the **Extensions** folder.
5. In the **System Folder**, locate and open the **Preferences** folder.
6. Locate the folder called **Eudora Planner Preferences** and drag it to the trash. Then, close all open folders.
7. From the **Special** menu, select **Empty Trash**.

Eudora Planner is removed from your system.

use the Eudora Planner installer to uninstall Eudora Planner from your system. To do this, double-click the installer icon, then follow the installer's directions as if you are going to install. When you get to the **Install the following** window, select the **Remove Eudora Planner** option, then click **Uninstall**.

Starting Eudora Planner

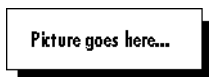
To start Eudora Planner, open the *Eudora Planner Folder*, then double-click the icon for the *Eudora Planner* application file. Eudora Planner launches, opening a document which name automatically contains the first name of your Macintosh's owner (which is entered in the Sharing Setup control panel). This document is not an actual data file that contains Eudora Planner data, but a viewer document that controls how you see and enter your data.

The actual data files are stored in a folder called *Eudora Planner Data*, which is also created in the *Eudora Planner Folder* the first time you launch Eudora Planner.

The Eudora Planner Window

Using the Toolbar

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



Navigating in Eudora Planner

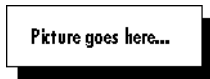
Both the Calendar and Address Book provide multiple views in which you can see and enter your Event and Contact information. Each view has a distinct layout and shows a different range of information and level of detail.

Calendar Views

Eudora Planner displays your Event information in seven different Calendar Views. Each view—Year, Day, Month, Week, Multi-Day, List, and Contiguous Day—shows a different range of dates and level of detail. The following sections describe the Calendar views and their features.

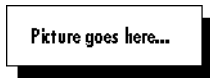
Year View

The Year View displays simple thumbnail calendars for each month of a selected year. Use the left and right navigation arrows to move backward and forward through the Calendar a year at a time. To open a specific Month View, double-click the month heading for that month. You can likewise double-click a specific date to see its Day View.



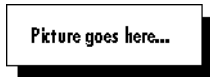
Month View

The Month View shows Events scheduled for an entire month. To create an Event, click anywhere in a day's cell to select that day, then select an Event type from the Insert menu. When you select a day cell, all the To-Dos and Calls scheduled for that day appear in the To-Do List. Within the day cell, you can scroll down through a day's Events to see Meetings and Special Events scheduled for that day. Clicking the left and right arrows moves you backward and forward through the Calendar one month at a time.



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.



Multi-Day View

The Multi-Day View shows a daily timeline of Events scheduled for a seven-day period. The cells in the Multi-Day grid can represent time increments from five minutes to one-half hour, depending on your preferences.

Meeting Events and Calls with a specific time appear 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.

Picture goes here...

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.

Use the left and right navigation arrows to move backward and forward through the Calendar a 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.

Picture goes here...

List View

The List View displays your Events in a list format. You can determine the date range that appears in the list and sort the Events by name, start date, and start time. The List View also contains a feature that lets you group and sort items by field.

Picture goes here...

To-Do List

The To-Do List appears to the right of the Calendar in all 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 control-clicking anywhere in the list, then selecting a filtering option 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.

Picture goes here...

Event Detail

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

Picture goes here...

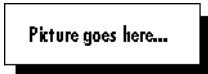
Address Book Views

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 clicking the field picker. To reposition a column in the List View, click its heading and drag it to the desired position. You can type directly into the List View by clicking the cell where you want to enter information.



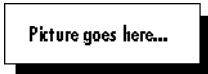
Detail View

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



The arrow buttons in the Detail View's button bar 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.



Setting Eudora Planner's General Preferences

The General preferences control Eudora Planner's login behavior and determine which Web browser and e-mail application Eudora Planner uses for its internet-related features.

To open the General preferences, from the **Define** menu, select **Preferences**. Then, click the **General** button.

Login

Select **Always log in as the owner of this Macintosh** to have Eudora Planner, upon launch, automatically log in to your personal database using the Macintosh owner name; or, select **Prompt me to log in each time Eudora Planner starts** to have Eudora Planner prompt you for a login name each time you launch it.

Internet Setup

Select your preferred World Wide Web browser from the **Browser** menu. The browser you choose here is launched when you click a URL icon displayed in the Detail View of an Event or Contact.

Select your preferred e-mail application from the **Mailer** pop-up menu. The application you choose here is automatically launched when you click an e-mail icon displayed in a Contact's Detail View.

If you are using the Internet Config program to point to your preferred browser and e-mail applications, you can click **Open Internet Config** to change Internet Config's preference settings.

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 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 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 Planner users.
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 Event Details dialog boxes.

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.
- Click an icon in Eudora Planner's toolbar to create a new Meeting, Call, To-Do, Banner, or Sticky Note in either the Calendar or Address Book.
- Click an empty area of any day in the Multi-Day or Day 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 any Calendar view, you can click an Event icon on the toolbar and drag it onto a date in the Calendar. An Event Details dialog box appears for the Event type you've chosen, where you can add any necessary information. You can also control-click anywhere on the Calendar, then select an Event type from the resulting contextual menu. The Event appears in the day block or time slot where you clicked.

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.

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 44.

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 within 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 a Contact” on page 56.

Use any QuickAccess component to create an Event without your having to open Eudora Planner. Events you create this are immediately saved to the Calendar. For more information on creating Events with QuickAccess, see “Creating Events with QuickDay” on page 102 and “Creating Events with QuickContact” on page 107.

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 Events and Contacts” on page 81.

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.

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, date and time, duration, reminder settings, and comments. For setting up Meetings outside your Eudora Planner workgroup or appointments for yourself, this is the only information you’ll need to enter.
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, email addresses, URLs, etc. Use this tab to make Event-related information available to yourself and your invitees.

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

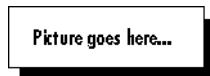
Scheduling a Meeting

In any Calendar view, you can create new Meetings by entering information into the Meeting Details dialog box.

To schedule a Meeting:

1. Open the Meeting Details dialog box. You can do this in a variety of ways, depending on the Calendar View you're using:
 - From the **Insert** menu, select **New Meeting**.
 - 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 using QuickDay or QuickContact, click the **New Meeting** button.
 - 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.



You can create a Meeting by control-clicking the Calendar, then selecting **New Meeting** from the contextual menu that appears.

2. Type or change the title of 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. You can do this by typing a date and time directly into each box or by clicking the **Date and Time Picker** button and selecting a date and time in the dialog box that appears.
4. If necessary, use the **Duration** options to change the duration of the Meeting.
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 this 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 84.*

6. If you want to be reminded of this Meeting, set a reminder (see "Using Reminders" on page 35 for more information on reminders). If this is a recurring

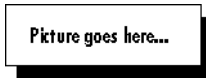
Meeting, you may want to set it up as a repeating Event (see “Setting Up Repeating Events” on page 35 for more information). If you are using Eudora Planner in a workgroup setting, select the **Show Time as Busy** option to have the Meeting block time in your schedule (see “Showing Your Time as Busy” on page 117 for more information).



*If you’ve turned on the **Remind me for all time commitments** option in the Calendar preferences, 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 48.*

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 other users to this Meeting, see “Using Group Scheduling” on page 116 for more information.

Setting Defaults for New Meetings

You can set preferences to determine what information is automatically entered into new Meetings when you create them.

To set defaults for new Meetings:

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

The Preferences dialog box appears.

2. Click the **Calendar** button.

The Calendar preferences appear, showing the Events tab as the active tab.

3. From the **Start at nearest** pop-up menu, select a unit of time to determine the default time for new Meetings that you schedule. For example, if you select **Current Time**, the Meetings you create will be automatically scheduled for the current time on the date you’ve chosen. If you select **30 Minutes**, your newly created Meetings will be automatically scheduled for the half-hour nearest the current time.

4. In the **Duration** box, enter a default length for the Meetings you create.

5. Select the **Alert if unavailable** option if you want Eudora Planner to alert you when you schedule a Meeting during a time which your are unavailable.

6. Select the **Auto-attend** option if you want your attendance to be automatically set for Meetings that you create.

7. Click **OK**.

Eudora Planner is set to automatically enter these defaults into new Meetings.

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 see their order of importance.

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 might 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 stay on the Calendar until you mark them as Complete. Dated To-Dos and Calls remain on the Calendar only 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 30.

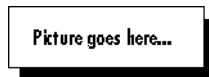
Scheduling To-Dos

Schedule a To-Do Event for 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 **New To-Do**.

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



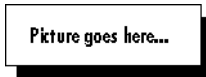
*You can create a To-Do by control-clicking anywhere on the To-Do List, then selecting **New To-Do** from the contextual menu that appears.*

2. In the **Title** box, type a name for the To-Do.
3. If you want this to be a dated To-Do, select the **Due** option, then enter a due date and start date.

You can do this by typing a date directly into each box or by clicking the **Date Picker** button and selecting a date in the dialog box that appears.

4. To set the To-Do's priority, select from the **Priority** pop-up menu.
5. Click the **Categories** button to assign categories to the To-Do.
6. Click **OK**.

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



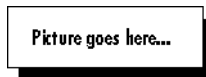
Scheduling Calls

Schedule Call Events for telephone calls you must make, 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 a Contact, 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 **New Call**.

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



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

2. If you want to attach a Contact to the Call, type a name into the **Name** box or click **Find Contact** to search your Address Book for a particular Contact. If not, go to step 3.

Once you begin to type a name into the Name box, 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. To assign priority and status to the Call, select from the **Priority** and **Status** pop-up menus. To assign Categories to the Call, click the **Categories** button.
5. Click the **Schedule** tab. If you want to change the date, time, or duration, or add a reminder for this Call, select the **Schedule at** option. The **Date**, **Time**, **Duration**, and **Reminder** boxes become available.
 - To change the date and time of the Call, type directly into the **Date** and **Time** boxes or click the **Date and Time Picker** button and select a date and time in the dialog box that appears.
 - Use the **Duration** options to change the length of the call.

6. If you want to be reminded to make this Call, set a reminder. See “Using Reminders” on page 35 for more information on reminders. If you are using Eudora Planner in a workgroup environment 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.

Picture goes here...

Tracking To-Dos and Calls

The To-Do List appears in every Calendar view and gives you a convenient way to log and track your To-Dos and Calls. Use the To-Do List to view, prioritize, and note the completion of To-Dos and Calls.

Viewing To-Dos and Calls

To determine which Events appear in the To-Do List, control-click anywhere within the list, then select from the options in the resulting contextual menu.

To choose which dated To-Dos and Calls appear in the To-Do List, select one of the following options from the contextual menu:

- Select **Today's To-Dos and Calls** to show just those To-Dos and Calls assigned to today; likewise, select **Next 7 Day's To-Dos and Calls** to display only items assigned to dates in the following week.
- Select **Selected Day's To-Dos and Calls** to see only those To-Dos and Calls for a selected date in the Calendar.
- Select **All Dated To-Dos and Calls** to display all your dated To-Dos and Calls, regardless of assigned due date, completion status, or overdue status.

In addition to the selection you make above, you can choose one or more of the following options:

- Select **Include Undated Items** to display your undated To-Dos and Calls.
- Select **Include Overdue Items** to display dated To-Dos and Calls that haven't been completed by their due dates and still remain incomplete.
- Select **Include Completed Items** to display all the To-Dos and Calls that you've already completed, no matter how long ago their completion dates.
- Select **Include To-Dos** to have To-Dos included in the selection you made above. If you deselect this option, no To-Dos appear in the To-Do List.
- Select **Include Calls** to have Calls included in the selection you made above. If you deselect this option, no Calls appear in the To-Do List.

Dated To-Dos and Calls also appear in the Multi-Day View's To-Do area, underneath

the date for which they are scheduled.

Picture goes here...

Tracking Priority and Completion of To-Dos and Calls

You can track the relative importance of your To-Dos and Calls by assigning priority labels to them. These labels enable you to sort the To-Do List by priority, so you can easily see which items are the most urgent. Eudora Planner supplies three default priority labels, but you can change the names of these and create up to ten of your own.

To create a Priority Label:

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

The **Preferences** dialog box appears.

Picture goes here...

2. Select the **Priorities** tab.
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 is assigned the default label.

4. Click **OK**.

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

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 control-clicking it, then selecting **Details** from the contextual menu that appears.*

2. On the **To-Do** or **Call** tab, click the **Priority** field 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.

When you create a To-Do or Call, it is by default labeled as incomplete. Incomplete To-Dos and Calls automatically forward daily in your Calendar. Once you've finished a To-Do or Call, you can mark it as 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 or Call as complete, on the **To-Do** or **Call** tab, click the **Status** field, then select **Complete**.



In the To-Do List, you can mark a To-Do or Call as complete by clicking once in the check box 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 its is complete. The Event will not appear on the To-Do List on subsequent days, unless you've set the To-Do List to display completed items.

Organizing the To-Do List

You can determine which Event fields appear in the To-Do List and the order in which they are displayed.

To add and reorder columns in the To-Do List:

1. Click anywhere within the To-Do List to select it. Then, from the **Define** menu, select **List Columns**.

The Event List Titles dialog box appears.

2. In the **All Columns** area, select the title of the To-Do field that you want to display as a column, then click **Add**.

The selected field title moves from the All Columns area to the Ungrouped list in Current Columns area. A corresponding column appears in the To-Do List.

3. To add more columns to the To-Do List, repeat step 2 as many times as needed.
4. To reorder the To-Do List columns, drag the items appearing in the **Ungrouped** list to different positions within the list.

The order of the To-Do List columns changes to reflect that of the Ungrouped fields.

5. Click **OK**.

Using Other Event Types

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

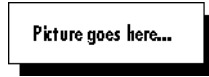
Scheduling Holidays and Special Events

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 associated with them, such as birthdays, anniversaries, conferences, or vacation days.

To schedule a Holiday or Special Event:

1. From the **Insert** menu, select **New Holiday** or **New Special Event**.

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



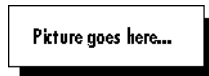
*To add a new Holiday or Special Event to your Calendar, control-click in any View, then select **New Banner** from the contextual menu that appears.*

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, type a start date into the box. You can also click the **Date Picker** button to select a date. If you need to select a different month, select one from the list or click the arrow buttons at the top of the month-view Calendar. Click the arrows above the list of month names to select a different year.

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 35 for more information on reminders.
6. Click **OK**.

The Event is saved and appears in your Calendar.



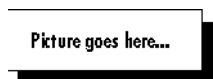
Adding Banners

For Events that span multiple days, such as conventions or vacations, you can 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 **New Banner**.

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

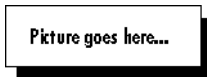


*You can add a Banner by control-clicking in any Calendar View, then selecting **Banner** from the contextual menu that appears.*

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 do this by typing a date and time directly into each box or by clicking the **Date and Time Picker** button and selecting a date and time in the dialog box that appears.
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 35 for more information on reminders.
6. Click **OK**.

The Banner is added to your Calendar.



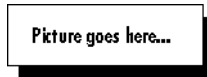
Using Sticky Notes

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, minimized, or collapsed 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 **New Sticky Note**.

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



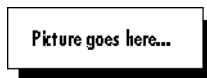
*You can create a new Sticky Note by control-clicking in any Calendar View, then selecting **New Sticky Note** from the contextual menu that appears.*

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 it. To resize it, drag the bottom right corner until you reach the desired size.



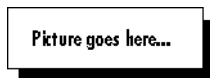
Setting Up Repeating Events

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, which is a good way to set up your regular, recurring meetings.

To schedule a repeating Event:

1. Double-click the Event to open the Event Details dialog box.
2. Click the **Repeating Event Options** button.

The Repeat Info dialog box appears.



3. Select a setting in **Repeat Options** section:
 - To have the Event repeat at a standard interval, choose one of the pre-defined settings in the top area of the section.
 - To have the Event repeat at an interval of your making, select one of the **Repeat every** options. Select the first option to set a specific interval of days between repeats. Select the second option to pick specific days of the week on which the Event repeats.
4. Enter a value into the **# of times to repeat** box to determine how many times the repeating Event occurs.
5. Click **OK**.

The Event now appears throughout the Calendar at the repeat interval you've specified.

Using Reminders

Eudora Planner can remind you of an upcoming Event—minutes, hours, or days before it occurs—by flashing the title of the Event in the menu bar, displaying a dialog box, playing a sound, 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.

If the Event is a Call, select the **Schedule** tab. Otherwise, select the tab with the

same name as the Event (for example, if the Event is a Meeting, select the **Meeting** tab).

2. Select **Reminder**.

The Reminder Info dialog box appears.



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

3. Select from among the **Minutes Before**, **Hours Before**, and **Days Before** options. Then, type a value into the box to determine the amount of time prior to the Event you want to be reminded.

4. Determine the type of reminder by selecting from among the following options:

- To have a sound to accompany the reminder, select **Play Sound**, then select a sound from the popup menu.
- To have Eudora Planner remind you by flashing the Event title in the menu bar, select **Flash icon in menu bar**.
- To have Eudora Planner remind you by showing an alert dialog box, select **Display dialog**.
- To have Eudora Planner remind you by launching another application, select **Launch Application**. For example, if the Event you are being reminded of requires that you type an e-mail message, you may want Eudora Planner to launch your e-mail application. To select an application, click the **Select** button.

Once you've made your selections, click **OK** to return to the Event Details dialog box. The Reminder box indicates the setting you've chosen.

Picture goes here...

5. Click **Save** 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 the reminder and not be reminded again. Or, select a **Snooze** option to have the Reminder appear again after a specified time interval.

Picture goes here...



If you set a reminder for a repeating Event, the reminder occurs each time the repeating Event appears on your Calendar. When you dismiss the reminder for one occurrence of the repeating Event, you dismiss only the Reminder for that particular day.

Setting Reminder Preferences

You can opt to have Eudora Planner automatically remind you of all your time commitments, saving you the trouble of setting a reminder for each Event that shows as busy time in your schedule.



When activated, this feature does not override any reminders you've specifically set for individual Events, so those Events still remind you at the times you've specified.

To set automatic reminders for all Events that show as busy time in your Calendar:

1. From the **Define** menu, select **Preferences**.
The Preferences dialog box appears.
2. Select the **Calendar** button, then make sure that the **Events** tab is active.
3. In the **Reminders** area, select the **Remind me for all time commitments** option. Enter a time value into the box, then select a unit of time from the pop-up menu.
4. To determine how Eudora Planner reminds you, select from among the **Flash icon in menu**, **Display dialog**, **Play sound**, and **Launch application** options. You can select any or all of these options.

Eudora Planner now automatically reminds you of all Events that show as busy time, even if you haven't set reminders for each of those Events.

Attaching Items to Events

You can add useful information to Events by linking them to related objects, such as Contacts in your Address Book, documents created in other applications, or document aliases. You can also create links to relevant email addresses and Internet URLs.

Attaching Contacts

When you schedule an Event that is in some way related to one of your Contacts, you can physically link that Contact to the Event. So, for example, if you schedule a conference call with three Contacts in your Address Book, you can attach all three Contact records to the Call. Those Contact names appear in the Call's Attachments area, where you can double-click them to see the Details dialog box for each. Likewise, the Call is recorded in the History section of each Contact's Details dialog box, where you can double-click its title to view its details.

To attach 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** box, start 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 area.

4. In the Matching Contact area, select the checkbox next to the name you want to attach to the Event, then click **Done**.

The selected Contact appears in the Event's Attachments area.



Picture goes here...

5. Click **Save**.

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



Picture goes here...

Attaching Files

There are two ways to attach a file to an Event: by either attaching the whole file or by attaching just an alias of the file. When you attach a file to an Event, the file is actually copied into your Eudora Planner database, where it is stored until you delete either the inserted file or the Event to which it is attached. When you attach a file alias, only a pointer to the file is stored in your database, minimizing the size of the database and saving space on your hard drive.

Both attached files and aliases appear in the Event's Attachments list, from which you can open the file in the application that created it.



Copying files into your database will increase its size. If you need to keep your database small, you should create aliases 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 aliases to files will no longer work, as the files themselves are no longer available.

To attach a file or file alias to an Event:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Click **Add File** or **Add Alias**, depending on what you want to attach.

An Open dialog box appears.

3. Locate and select the file you want to attach to the Event, then click **Open**.

The file or file alias is copied into your database, and the file name appears in the Attachments list. The Type field indicates that it is either a file or an alias. You can open the file by selecting it in the list, then clicking **Launch**.

4. Click **Save** to close the Event.

To remove an attached file or file alias from an Event:

1. In the Event Details dialog box, click the **Attachments** tab.
2. Select the file or alias in the Attachments list box.

The name becomes highlighted and the Remove button becomes available.

3. Click **Remove**.

The file or alias 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 alias deletes only the reference to the original file, and does not change that file in any way.

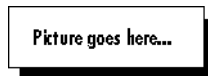
Attaching Web Sites and E-mail Addresses

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

To attach a Web site to an Event:

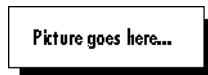
1. In the Event Details dialog box, click the **Attachments** tab.
2. Click **Add URL**.

The Attach URL dialog box appears.



3. Enter a name for the Web site into the upper box. Enter the URL of the Web site into the lower box.
4. Click **OK**.

The web site is added to the Attachments list. You can open the Web site with your browser by selecting its entry in the list, then clicking **Launch..**



5. Click **Save**.

To attach an e-mail address to an Event:

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

The Attach E-mail Address dialog box appears.

3. In the upper box, type the name of the person or company you want to associate with the email address. In the lower box, type the actual e-mail address.
4. Click **OK**.

The name associated with the e-mail address appears in the Attachments list. To use to send a message to this address, click its entry in the list, then click **Launch**. Eudora Planner opens your e-mail program, which automatically creates a new message addressed to the intended recipient.

Picture goes here...

5. Click **Save**.

Getting More Out of the Calendar

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

- Copying, pasting, and dragging Events
- Using Eudora Planner's search feature to find specific Events
- Changing the appearance of Events so that you can better organize your Calendar visually
- 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 dragging or pasting it to a new position on the Calendar.

Cutting, Copying, and Pasting Events

To cut and copy an Event, select it in any Calendar view, then select **Cut** or **Copy** from the **Edit** menu. To paste an Event, click to set the insertion point on the Calendar, then select **Paste**. All information in the Event remains the same except for its date and, possibly, time, if you're dragging in the Multi-Day or Day View.



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

Moving Events

You don't need to open the Event Details dialog box to reschedule an Event. Instead, simply drag it from one date and time to another. Use the appropriate view—Day, Week, or Month—depending on how far you want to move the Event.

Searching the Calendar

The Calendar has a variety of search features which let you perform searches If you

need to find a specific Event in your Calendar, you can search for it by title.

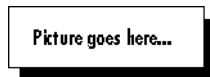
Using the Find Feature

The Find feature is most useful for locating a particular Event that appears in the active Calendar tab. When you search by this method, you enter a keyword to search for, then initiate the search operation. Eudora Planner looks for the keyword in the Title and Descriptions fields of each Event in the active tab. When a matching Event is found, Eudora Planner advances to the date of the Event and highlights it in the Calendar view. You can perform this type of search in any Calendar view.

To find an Event using the Find feature:

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

The Find Event dialog box appears.



2. In the **Find** box, type text from the Title or Description field of the Event you're searching for.
3. Click **Find**.

The Calendar advances to the first occurrence of the Event and highlights in the Calendar view. You can double-click the Event to view it. To find subsequent occurrences of the Event's matching the search criteria, select **Find Next** from the **Edit** menu.

Using the Find All Feature

The Find All feature lets you find multiple Events through a search based on information contained in one or more of the various Event fields. When you use this feature, you can enter the Event information you want to search for, select the specific Event fields and Calendar tabs to be included in the search for that information, then generate a list containing all Events that match your search criteria.

To use the Find All feature to search for Events:

1. From the **Edit** menu, select **QuickFind**.
The Find Events dialog box appears.
2. In the **Find** box, enter the Event information you want to search for.
3. In the **Search** area, select either **Current Tab** to search only the active tab or **All Tabs** to search every tab in the Calendar.
4. Click the triangle to expand the dialog box for more search options.
5. In the **Fields to Search** area, select the Event fields you want to include in the search. Choose fields that might contain the information you entered in step 2.
6. Choose a **Comparison** option:

- Select **Contains** to find any Events that have the information you entered in the Find box included somewhere within the text or number string of the fields you selected in step 5. For example, if you use this comparison method to search for any Events containing the word “budget” in the Title field, you would find Events entitled “Send Quarterly Budget to Tammy” or “Budgeting in the Nineties,” as well as those just called “Budget.”
- Select **Equals** to find only those Events containing a field that matches exactly what you entered into the Find box. If you use this comparison method, a search for the word “budget” will turn up only those Events called “Budget.” If you wanted to find all Events entitled “Send Quarterly Budget to Tammy,” you would have to type that exact title into the Find box.
- Select **Starts with** to find Events containing a field that starts with the text or number string you’ve entered into the Find box. For example, a search for the words “meeting with” would turn up any Events entitled “Meeting with Tammy” or “Meeting with Ken,” but would not turn up an Event called “Status Meeting with Tammy and Ken.”

7. Click **Find**.

A Find Results tab appears, displaying a List View that contains all Events matching your search criteria. To view the details for a found Event, double-click it in the list. You can save these search results as a new tab, as described in “Saving Your Find Results” on page 42.

Finding Events by Category

Use the Find Categories feature to perform a Calendar search based on Category.

To find Events by Category:

1. From the **Edit** menu, select **Find Categories**.
The Find Events with Categories dialog box appears.
2. In the **Categories** area, select the Categories you want to include in the search. To choose all Categories on a particular server, just select that server’s name.
3. Click **Find**.

A Find Results Tab appears, displaying a a list of Events containing the Categories you selected.

Saving Your Find Results

To keep the results of a search for future reference, save the Find Results tab as a new tab.

To save the Find Results tab as a new tab:

1. Click the floppy diskette icon next to the tab’s name.
The Save Results as a Tab dialog box appears.
2. Enter a name for the tab in the **Name** box.

3. Select the check boxes of the Categories you want to assign to the Events in this tab.
4. Click the **Assign Category to any new Contacts created in this tab** pop-up menu to select the default primary Category for Events you create in this tab.
5. Click the **Tab Color** pop-up menu to select a background color for this tab.
6. Click **OK**.

The new tab appears in your Calendar, showing any items associated with the Categories you selected in step 4. You can modify this tab as you would any other Calendar tab.

Enhancing the Appearance of Events

You can change the appearance of important Events to make them more eye-catching—and to give your Calendar more visual appeal. Eudora Planner lets you enhance individual Events by changing their text styles and colors or by attaching graphics to them.

Changing the Style and Color of Event Text

Events by default obtain their text style and color settings from their primary Categories; but if you want to make an important Event stand out on your Calendar, you can individually change its text settings. The style and color changes you make using the following procedure override the settings assigned by the Category.

To change the style of an Event:

1. In any view, click the Event to select it.
2. To change the Event's font characteristics, from the **Define** menu, select **Font, Size, or Style**, then select a font, font size, or font style from the resulting submenu.

Your font preferences are immediately applied to the Event.

3. To change the color of Event's title text, from the **Define** menu, select **Foreground Color**, then choose a color from the chart that appears. To change the Event's background color, from the **Define** menu, select **Background Color**, then choose a color from the chart.

The background color you select applies to Banners and Sticky Notes in any Calendar view, and to other Event types in the Multi-Day and Day views.

Adding Graphics to Events

You can make an important Event stand out by attaching a graphic to it. The attached graphic appears next to the Event's title.

To add a graphic to an Event:

1. Open either a Month or Week View containing the Event.
2. From the **Window** menu, select **Show Graphics Palette**.

The Graphics Palette window appears.

3. In the Graphics Palette, click on a graphic, then drag it on top of the Event. When the Event's title becomes outlined, release the mouse button.

The graphic is copied into the Calendar and appears next to the Event's title.

Using Event Templates

You may find that you often create Events that contain the same information or attachments as existing Events in your Calendar, such as irregularly recurring Meetings that always include the same invitees, location, and Categories. You can simplify the creation of such Events by using Event templates. An Event template is an Event Details dialog box that already contains a certain amount of information. The template is available from the Insert menu anytime you need to create a new Event containing that information.

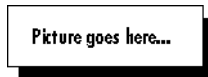
Creating Event Templates

You create an Event template using the same basic steps required 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 **Edit Templates** from the resulting sub-menu.

The Templates dialog box appears.



You can *create a new Event template by control-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. If necessary, select **Event Templates** from the pop-up menu at the top of the dialog box.
3. Click **New**.

The New Template dialog box appears.

4. Enter a name for the template. Then, click **OK**.

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

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

See “Adding Events to the Calendar” on page 24 for more information. You can also add Contacts, attachments, email addresses and links to web sites. To

learn more about these options, see “Scheduling Users, Rooms, and Resources for Meetings” on page 116. Click **OK**.

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

Creating Events from Templates

You can use your Event templates to create new Events that contain similar information and attachments. Once you’ve create a template-based Event, you can add to or modify it as needed.

To create an Events from a template:

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

The Event Details dialog box appears. All information and attachments that you’ve added to this template appear in the new Event.



*You can open an Event Template by control-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 **Save**.

The new Event appears in your Calendar.

Organizing the List View and To-Do List

This section explains how you can organize the List View and To-Do List to display the content and layout you prefer.

Adding, Removing, and Reordering Columns

The List View and the To-Do List display Event information in columns, with each column representing an Event field. You can select which Event fields appear as columns and change the order in which they are displayed.

To add, remove, and reorder List View and To-Do List columns:

1. Click in either the List View or To-Do List to select that area of the Calendar. Then, from the **Define** menu, select **List Columns**.

The Event List Titles dialog box appears. The Current Columns area shows the titles of Event fields that currently appear as columns in the List View. The All Columns area shows the titles of all available Event fields.

2. To add a column, select an Event field title in the **All Columns** area, then click **Add**.

The selected field title moves from the All Columns area to the Current Columns area. The field immediately appears as a column in the List View or To-Do List.

3. To remove a column, select an Event field title in the **Current Columns** list, then click **Remove**.

The selected field title moves from the Current Columns area to the All Columns area. The column immediately disappears from the List View or To-Do List.

4. To reorder the List View columns, drag the items appearing in the **Ungrouped** list to different positions within the list.

The order of the List View columns changes to reflect that of the Ungrouped fields.

5. Click **OK**.

Grouping Events

In the List View and To-Do List, you can group Events so that they appear in clusters according to a field, allowing you to quickly identify Events with a common variable in that field. For example, if you want to see what Events you have scheduled on each Friday for the next three months, you could group by day of the week, so that Events appear in the List View or To-Do List clustered under the name of the day on which they occur. The Friday cluster would show all Events occurring on that day for the next three months, regardless of Event type, Category, or other variables.

To group Events in the List View and To-Do List:

1. Click in either the List View or To-Do List to select that area of the Calendar. Then, from the **Define** menu, select **List Columns**.

The Event List Titles dialog box appears. The Current Columns area shows the titles of Event fields that currently appear as columns in the List View. The All Columns area shows the titles of all available Event fields.

2. To group Events in the List View by a field, in the **Current Columns** area, drag a field title from the **Ungrouped** list to the **Grouped** list.

In the List View, the title of the selected field moves from the List View column to a position within the list itself. The Events in the List View become grouped according to that field.



Picture goes here...

3. Drag more fields to the **Grouped** list as desired. You can reorder these as you see fit. The top field in the Grouped list determines the primary grouping; all other fields are secondary—subgroups within the primary group.



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4. Click **OK**.

The List View reflects the changes you made in the Event List Titles dialog box.

Handling Meeting Invitations

If you are using the Eudora Planner in a workgroup environment and another user invites you to a Meeting, Eudora Planner sends you a Meeting notification, and then automatically opens the Meeting Invitations dialog box so you can read details about the Meeting. You can then accept or decline the invitation.

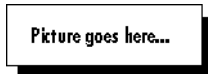
Responding to Meeting Invitations

Once you've received a Meeting notification, you can open the Meeting Notices dialog box, which shows the title, date, and time of the Meeting, the name of the Meeting's creator, and whether your attendance is required or optional. It is there that you accept or decline the Meeting invitation.

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. To respond to an invitation in the list, click to select it, then click the **Attend** or **Decline** button.

If you choose Attend, the meeting blocks time in your schedule. If you choose Decline, the meeting is deleted from your Calendar.

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

Your responses appear in each Meeting's Details dialog box. The user who created a Meeting can open the Meeting Details dialog box to see whether you've accepted or declined the invitation.

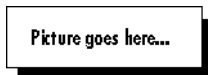
Setting Your Availability for Meetings

Eudora Planner lets you define the times during the day that you're available for other users' meetings. A user who invites you to a meeting outside those times will find that you're unavailable.

To set your availability for Meetings:

1. From the **Define** menu, select **Meeting Availability**.

The Meeting Availability dialog box appears, displaying your name.



2. Select the check boxes for 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.

3. For each day of the week you've selected, enter into the **From** and **To** boxes the range of time that you're available for that day. You can advance through these boxes by clicking the Tab key.
4. Select the **Unavailable During Lunch** box, if appropriate, and enter in your regular lunch time if different from the default of 12-1 PM.
5. 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

The Calendar contains a number of preferences that 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 **Preferences**. In the Preferences dialog box, click **Calendar** to view the options for the Calendar.

Picture goes here...

Events Tab

The Events tab contains preferences related to the creation of new Events and for the general reminder feature.

New Meetings

For details about these preferences, see "Setting Defaults for New Meetings" on page 27.

Reminders

For details about these preferences, see "Setting Reminder Preferences" on page 37.

Miscellaneous

To have Eudora Planner open the Event Details dialog box each time you create an Event, select **Show details for new events**. To receive a warning dialog box each time you delete an Event, select **Alert when deleting events**.

Select the **Block time by default** options to have Specials and Banners automatically set to occupy your time when you create them.

Select **Timestamp new Calls and To-Dos** to have a timestamp automatically inserted into Calls and To-Dos when you create them.

Priorities Tab

For details about the preferences on this tab, see “Tracking Priority and Completion of To-Dos and Calls” on page 31.

Chapter 3

Using the Address Book

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

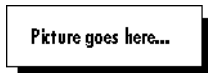
Creating Contacts

You can create a Contact whenever you need to record information about a person or organization. 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 Contact:

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

The Contact Details dialog box appears.



2. Enter 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 **QuickContact** checkbox.
4. Enter a home address, work address, or both. Select the type of address you want to enter by selecting either **Work Address** or **Home Address** from the pop-up menu above the address boxes.
5. To add telephone numbers, e-mail addresses, and URLs, select an item from one of the five connection field pop-up menus. In the box next to the field 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 **Save**.

The Contact is recorded in the Address Book and appears in the List View.



You might find that you often create Contacts that contain much of the same information as existing 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 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 their names, addresses, and phone numbers. Over time, a Contact detail can become a comprehensive record of your interaction with a person or organization, including specific personal information contained in custom fields, a history of related notes and Calendar Events, and links to relevant documents.

You can attach Calendar Events and free-form notes to each Contact's History list. The Attachments list can also store links to related documents, whether those documents reside on your computer, on your network, or on the Internet.

Picture goes here...

Using Custom Fields

You can create custom fields to store important data that can't be placed in standard fields such as those reserved for name, company, and addresses. Eudora Planner comes installed with a number of useful, sample custom fields, which appear in a Contact's Custom Fields area.

When you create a custom field, you give it a unique name, then specify the type of

data it's formatted to 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 that it contains only dates. You might also make a *Birthday Card* field, with a type of *Yes/No*, to indicate whether or not a particular Contact should receive a birthday card.

A custom field is assigned a specific field type to assure that the information in that field is in a consistent format throughout your Address Book, which in turn assures accuracy when you do searches and sorts based on that information.

Creating Custom Fields

A custom field is formatted to contain a specific type of information. When you create a custom field, you can specify the type of information you want the field to contain. You can choose from ten field types:

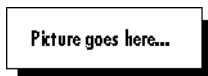
Field Type	Contains ...
Yes/No	A simple yes or no option
Date and Time	The date and time (timestamp)
Date and Time Range	Starting and ending dates and times
Date Only	A single date
E-mail	An e-mail address
Number	Any positive or negative number
Phone	A telephone number
Text	Plain text information
Time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

The Custom Fields dialog box appears.

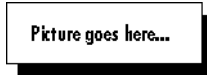


2. Click the **Server** pop-up menu to select the server where you want this custom field to reside.

A default server is already selected for you. If you're using Eudora Planner in a workgroup setting, you can select a workgroup server from the Server pop-up menu, thereby making the custom field available to other users connected to that server.

3. Click **New**.

The Custom Field 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** to close the Custom Field dialog box. Then, click **Done** in the Custom Fields dialog box.

The custom field appears in the Detail View of any Contact stored on this server. You can enter information into this field as you would any standard field. Custom fields saved to a workgroup server are available to other users on the network.

Changing Custom Field Names

Eudora Planner lets you change the names of custom fields any time.

To change the name of a custom field:

1. From the **Define** 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 **Edit**.
The Custom Field dialog box appears.
4. Type the new name into the **Name** box.
5. Click **OK** to close the Custom Field dialog box, then click **Done** to close the Custom Fields dialog box.
The custom field name is changed for all associated Contacts in your Address Book.



You can change the name of a custom field, but not its field type.

Deleting Custom Fields

You can delete any custom fields that you no longer need.



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

To delete a custom field:

1. From the **Define** 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** when you are prompted to confirm deletion of the custom field.
The custom field is removed from the Custom Fields area of any Contacts in your Address Book.

Using the General Comments Area

The General Comments area is a convenient place to type notes or comments about a Contact. Once you've typed information into the General Comments area, you can let it remain there, delete it, or save it as a titled, dated note that becomes part of the Contact's History. For information about notes, see "Attaching Notes to Contacts" on page 56.

To enter a comment into the General Comments area:

1. Double-click the Contact to which you want to add the comment.
The Contact Details dialog box appears.
2. Click the triangle to open the **General Comments** section, if necessary.
3. Type your comments.
The comments remain in the General Comments area until you delete them.

To save a comment as a note:

1. In the Contact Details dialog box, open the **General Comments** section by clicking the triangle, if necessary.
2. Click **Save Note**.
The Edit Note Attachment dialog box appears, displaying the information you typed into the General Comments section.
3. In the **Title** box, type a title for the note.
4. Click **Save**.
The note containing your comments appears in the Contact's History. You can double-click the note to view, add to, or alter the comments.

To clear the General Comments area:

1. In the Contact Details dialog box, open the **General Comments** section by clicking the triangle, if necessary.
The General Comments area appears.
2. Click the **Clear Comments** button.
A warning dialog box appears stating that the action cannot be undone.
3. Click **Yes**.
The comments are deleted from the General Comments area.

Using the Contact History to Track Events and Notes

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

Use the Contact History to keep a log of all Events and notes related to a particular Contact. The History shows the title of an attached Event or note and, where applicable, the priority, start date, start time, and completion status. To show or hide a particular type of item in the History, select or clear the appropriate **Display** check box.

Attaching New Events to a Contact

When you schedule an Event related to a Contact, you can attach the two items to each other to show their relationship. The Events that you attach to a Contact appear in that Contact's History, where you can open Events by double-clicking them.

Existing Events must be attached to Contacts from within the Event itself. For information, see "Adding Contacts to Events" on page 24.

To attach a new Event to a Contact:

1. If the Contact is not already opened, double-click it 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 for the Event type you selected appears.
3. Enter information for the Event. For details about entering information into the Event Details dialog box, see "Adding Events to the Calendar" on page 16.
4. Click **OK**.
The Event is saved to the Calendar and its name appears in the Contact's History.

Picture goes here...



*You can also attach an Event to a Contact by control-clicking the Contact in the List View, then selecting an Event type from the options displayed in the contextual 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.*

Attaching Notes to Contacts

Eudora Planner lets you create notes that you are attached to your Contacts. A note might contain any information that you cannot fit into the standard or custom Contact fields, such as personal memo about a Contact or a record of a meeting with that Contact. Attached notes appear in a Contact's History, where you can

double-click them to review, modify, or copy their contents.

To attach 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. Click the **New Note** button in the button bar.
The Note Detail dialog box appears.
3. In the **Title** box, type a title for the note.
4. Type your comments into the note.
5. Click **Save**.

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

Deleting Items from the Contact History

To reduce clutter and decrease the size of your Eudora Planner database, you can delete from the Contact History items that you no longer need.

To delete an Event or note from a Contact's History:

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

The item is removed from the Contact's History list. If you've selected an Event, it is deleted from the History, but not from the Calendar.



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

Attaching Documents to a Contact

Eudora Planner lets you attach documents created in other applications to Contacts in your Address Book. You can attach documents in two ways: either by attaching actual document files or by attaching aliases of documents. Both methods have advantages, depending on your preferences.

When you attach a full document to a Contact, the actual document is copied into your database. This has the disadvantage of increasing the size of your Eudora Planner database, but the advantage of guaranteeing that the document will always be available, at least until you delete it from the Contact. When you attach an alias, you copy only the small alias into your database, thereby minimizing the database's size. However, should you ever delete the original document or move your Eudora Planner database to another machine, the document will be unavailable from within the Contact.

Attached documents and aliases appear in a Contact's Attached 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 or document alias to a Contact:

1. Double-click the Contact to which you want to attach the document.
The Contact Details dialog box appears.
2. From the **Tools** menu, select **Attach**. Then, from the submenu that appears, select either **File** or **Alias**.
The Open dialog box appears, which you can use to navigate to find the document.
3. Click **OK**.
The name of the document appears in the Attached list of the Contact. You can view or edit the document by double-clicking it, which launches the application that created it.

Attaching Another Contact to a 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 another Contact to a 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.



Picture goes here...

3. From the pop-up menu, select **Found Contacts**, **All Contacts**, or **QuickContacts**.
 - The Found Contacts option lets you search your Address Book for a specific Contact.
 - The All Contacts option lists every Contact in your Address Book.
 - The QuickContacts option lists all those Contacts you've designated as Quick Contacts.
4. If you selected either the All Contacts or Quick Contacts option, go to step 5. If you selected **Found Contacts**, start typing a Contact's name into the **Find** box.
As you type, Eudora Planner searches your Address Book for Contact names that match the text you're entering. Matching names appear in the Matching

Contacts list.

5. Select the check boxes of any Contacts in the Matching Contacts list that you want to attach, then click **Done**.

The selected Contacts appear in the opened Contact's Attached list.

6. Click **Save**.

The Contacts you selected are attached to the opened Contact and appear in the opened Contact's Attached list. To view details about an attached Contact, double-click it in the Attached list.

Deleting Items from the Attached List

You can delete the documents, document aliases, and Contacts that you no longer need to appear in a Contact's Attached list.

To delete an item from the Attached list:

1. Double-click the Contact containing the attached document, document alias, or Contact you want to delete.

The Contact Details dialog box appears.

2. Click the **Attached** triangle.

The Attached list appears.

3. Select the item you want to remove, then press the **Delete** key.

The selected item is deleted from the Attached list. If the item was a document or Contact, only the attachment is deleted; the original item is not affected.



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

Selecting Primary Fields

Your Address Book might contain Contact records for a wide variety of people you interact with, such as your co-workers, 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 specific 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 for each Contact, whether it be the Work or Home address.

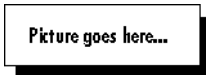
Primary fields function in the following areas:

- 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 the Details for a particular Contact.
- Three columns that can be displayed 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 you select.
- The phone field you select as primary determines which phone number appears for a Contact displayed in QuickContact.

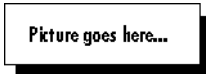
You can select primary fields by clicking field names in the Contact Details dialog box. The names of the primary fields appear underlined.

To select primary listing and address fields:

1. Double-click 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, select either **Work** or **Home**, depending on which address field you intend to make the primary.
4. Click **Street**.
The field name becomes underlined, indicating it is the primary field.

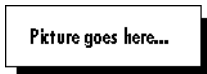



5. Click **OK**.
The field you've selected becomes the primary field for this particular Contact.

To select a primary connection field:

1. Double-click the Contact for which you want to select the primary connection field.
The Contact Details dialog box appears.

2. Click the pop-up menu next to the uppermost connection field.
A list containing each type of connection field appears.
3. From the pop-up menu, select the connection field you want to designate as primary.
4. Click **Save**.
The phone number you've selected to appear in the uppermost connection field appears in the Contact heading, indicating that it is the primary.



 *If the uppermost connection field is empty, then the uppermost connection field containing data becomes 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 Events and Contacts” on page 81.

Using Contact Templates

You may find that you often create Contacts that contain much of the same information and attachments as other Contacts 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 any field information, attached documents, notes and Events, and 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 a Contact Template

After you create a Contact template, Eudora Planner makes it accessible from the Insert menu.

To create a Contact template:

1. From the **Insert** menu, select **Contact from Template**, then select **Edit Templates** from the submenu that appears.
The Templates dialog box appears, displaying the Contact Templates option in the pop-up menu.
2. Click **New**.
The New Template dialog box appears.

3. Type a name for the template, then click **OK**.
The Contact Template 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 **Save**.
The template is saved and appears in a submenu whenever you select the **Contact from Template** command from the **Insert** menu.

Creating a Contact from a Template

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 a Contact based on a template:

1. From the **Insert** menu, select **Contact from Template**, then select a template name from the submenu that appears.
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 **Save**.
The new Contact appears in your Address Book.

Finding Contacts

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

The QuickFind 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 Address Book at once—including all custom fields—or narrow the search by having Eudora Planner search only selected fields.

The Find Categories feature generates a list of Contacts assigned a specific Category or group of Categories. The QuickFind button lets you do a one-click search for the Contacts associated with a single Category.

The following sections describe Eudora Planner's search features.

Using the Find Feature

The Find feature is most useful for locating a single Contact that appears somewhere in the active Address Book tab. When you search using this method, you enter the keyword you want to search for, then initiate the search operation. Eudora Planner looks for the keyword in the fields that appear as columns in the current tab, then advances you to the first Contact containing the word.



The Find feature only searches those fields displayed as columns in the current Address Book tab. You can widen the search parameters by adding columns to the tab. For details on how to do this, see . . .

To use the Find feature to find a Contact:

1. From the **Edit** menu, select **Find**.
The Find Item dialog box appears.
2. In the **Find** box, enter a keyword to search on.
This keyword can be a partial word. Eudora Planner will search for an instance of the keyword in any Address Book field displayed in the active tab.
3. Click **Find**.
4. Eudora Planner advances to the first Contact in the active tab that contains the keyword, then highlights the field column where the keyword appears.
5. To find another Contact containing the keyword, from the **Edit** menu, select **Find Next**.

Using the Find All Feature

The Find All feature lets you set the search criteria before you initiate a search for Contacts. You can select which Contact fields are searched, to find a specific Contact or a group of Contacts, type a name or keyword to search for and select the search criteria. This method is best for finding multiple Contacts, since Eudora Planner returns a list of all Contacts that match your criteria.

To use the Find All feature to find Contacts:

1. From the **Edit** menu, select **Find All**.
The Find Contacts dialog box appears.
2. In the **Find** box, enter a keyword to search for.
3. Select a **Search** option.
Select **Current Tab** to search only the active Tab. Select **All Tabs** to search every Tab in your Address Book.
To start the search, go to step 7. To change the search criteria before starting the search, go to step 4.
4. Click the triangle at the bottom left corner of the dialog box.

The Find Contacts dialog box expands to show more options.

Picture goes here...

5. In the **Fields to Search** area, select the fields to be included in the search.
6. Select one of the following **Comparison** options:
 - Select **Contains** to search for Contacts with fields 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 with fields having 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 **Find**.

The Find Results tab appears, listing all Contacts matching your search criteria. See "Saving Your Find Results" on page 65 for information on how to save the search results.


Finding Contacts by Category

The QuickFind feature lets you perform a search based on Category. You can use this feature to find all the Contacts associated with one or more Address Book Categories.


To find Contacts by Category:

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

The Find Contacts with Categories dialog box appears.

 *Clicking the **QuickFind** button on the toolbar returns search results for just one category. To search for multiple categories, you must initiate the search from the Edit menu.*

2. In the **Categories** list, select the check box next to each category that you want to find.

 *When you search with this method, Eudora Planner looks for Contacts assigned any one of the categories you select here. A Contact need not be assigned each selected category to be found during this search.*

3. Click **Find**.

The Find Results tab appears, containing Contacts in the Categories you chose to search. See "Saving Your Find 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 enables you to quickly scan your QuickContacts to remove obsolete names and organizations.

Saving Your Find Results

To keep the results of a search for future reference, save the Find Results tab as a new tab.

To save the Find Results tab as a new tab:

1. Click the floppy diskette icon next to the tab's name.
The Save Results as a Tab dialog box appears.
2. Enter a name for the tab in the **Name** box.
3. Select the check boxes of the Categories you want to assign to the Contacts in this tab.
4. Click the **Assign Category to any new Contacts created in this tab** pop-up menu to select the default primary Category for Events you create in this tab.
5. Click the **Tab Color** pop-up menu to select a background color for this tab.
6. Click **OK**.

The new tab appears in your Address Book, showing any items associated with the Categories you selected in step 4. You can modify this tab as you would any other Address Book tab.

Finding, Viewing, and Deleting Duplicate Contacts

You can eliminate redundant entries in your Address Book and reduce the size of your Eudora Planner database by finding and deleting duplicate Contacts.

To find, view, and delete duplicate Contacts:

1. From the **Define** menu, select **Show Duplicates**.
The Find Duplicate Contacts dialog box appears.
2. Select a **Search** option.
Select **Current Tab** to search only the active tab. Select **All Tabs** to search every tab in your Address Book.
3. Click the triangle to expand the Find Duplicate Contacts dialog box.
4. In the **Fields to Match** area, select the fields to be searched for duplicate information.
For Contacts to be considered duplicates of each other, there must be matching information in each of the selected fields.
5. Click **Find**.

A tab entitled Find Results appears, displaying all the Contacts meeting your duplicate criteria. You can double-click a Contact to view its details.

6. To delete a duplicate Contact, select it, then press the **Delete** key.

The Contact is deleted from your Address Book.

Dialing Contacts

Eudora Planner's dialing function streamlines communication with your Contacts by allowing you to telephone them directly from your computer. When you use the dialing function to call a Contact, a Call Event is automatically logged into the Contact's History and saved in your Calendar.

You can choose between two dialing methods: modem and speaker. To use modem dialing, your computer must be connected to a telephone through a modem. When you initiate a call, Eudora Planner addresses the modem, which in turn dials the phone number. When the other party answers, you can pick up the handset of your phone and begin speaking.

To use speaker dialing, hold the mouthpiece of your telephone as close as possible to your Macintosh's modem when you initiate dialing. In some cases, you may have to raise your system's sound to make the phone respond. As long as your outgoing line supports touch-tone dialing, your call will go through. Once dialing is complete, you can wait for the party to answer.

Setting the Dialing Preferences

Your dialing needs may vary according to your location or that of the person you are calling. For example, at work you may need to dial "9" to get an outside dial tone, while at home you can just dial the phone number. When making long distance calls, you might need to enter a calling card number or disable call waiting before dialing the phone number. The dialing preferences let you set up multiple configurations to accommodate all the situations you encounter when dialing.

To set up the dialing preferences:

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

The Preferences dialog box appears.

2. Click the **Address** button to display the Address Book preferences, then select the **Dialing** tab.
3. From the **Dial via** pop-up menu, select a dialing method.



You may have to set additional preferences specific to either modem or speaker dialing. For more details, see "Configuring Modem Dialing" on page 67.

4. In the **Local area code** box, enter your area code. Select the **Omit local area code** option to have Eudora Planner omit the area code when dialing local

phone numbers.

5. Select the appropriate options from the **Dial Tone**, **Prefix**, and **Suffix** pop-up menus.
6. In the **When dialing** box, enter the word or abbreviation you put before a phone extension in a Contact's Phone field (for example, you might use *ext.*, as in "(503) 555-1234 *ext.* 567"). Then, in the **replace with** box, enter how many seconds the dialing device should pause when it encounters your chosen word or abbreviation (one comma equals one second).
7. Click **OK**.

The dialing feature is configured to dial in the way you've specified.

Configuring Modem Dialing

Eudora Planner supports any Hayes-compatible modem that responds to industry standard modem commands. Because of variations between different makes and models of modems, you may need to adjust Eudora Planner's modem dialing preferences to accommodate your specific modem. To do this, on the **Dialing** preferences tab, click the **Expert Setup** button to open the Modem Dialing Setup dialog box. This dialog box contains the settings that affect the way Eudora Planner interacts with your modem. The following table describes the options available in the Modem Dialing Setup dialog box.



Consult your modem's user's manual for specific details about your modem and modem commands before changing any settings in the Modem Dialing Setup dialog box.

Use this option...	To...
Port	Indicate which Macintosh serial port your modem is connected to.
Baud Rate	Indicate the speed of your modem.
Data bits	
Stop bits	
Parity	
Initialization	Determine how Eudora Planner addresses your modem for dialing
Hangup string	Determine how your modem releases the telephone line when you cancel a dialing operation.
Dial prefix	Determine how Eudora Planner prepares the telephone for dialing; a "T" at the end of the prefix indicates touch-tone dialing, while a "P" indicates pulse dialing.
Dial suffix	Determines how your modem behaves during a call. A semicolon suffix keeps the modem in command mode, so that it can release the telephone line if the call doesn't go through.

Configuring Speaker Dialing

The following chart describes the options available in the Speaker Dialing Setup dialog box.

Use this option...	To...
Tone Duration	Determine the length of the dialing tones played through your Macintosh speaker, in 60ths of a second. If you have problems connecting when dialing through your speaker, try increasing this setting.
Pause between tones	Determine the length of silence between each dialing tone, in 60ths of a second. If you have problems connecting when dialing through your speaker, try increasing this setting.
Comma duration	Set the length of silence each comma represents when you use commas in dialing strings.
Volume	Change the speaker volume of your dialing tones.

To dial a Contact:

1. In the Contact Details dialog box or in the Address Book List View, click the phone icon next to the phone number you want to dial.
The Call Details dialog box appears, containing the name and phone number of the Contact you are calling.
2. Click the **Dial Phone** button.
Eudora Planner dials the phone number.
3. If you are dialing by modem, pick up your phone's handset when the other party answers.
4. If necessary, you can change the title of the Call in the **Title** field, and type notes in the **Description** area.
5. Click **Save** to close the Call.
The Call is both saved in the Calendar and attached to the Contact's History.

Using the Internet Features

Eudora Planner integrates with your Internet-based applications to give you greater access to the people and organizations in your Address Book.

Sending E-mail to Contacts

Eudora Planner's e-mail function lets you use your preferred e-mail application to send pre-addressed messages to your Contacts. To use this function, you need to set Eudora Planner to recognize your e-mailer. When you click an e-mail button in a Contact's record, Eudora Planner launches your e-mailer, which in turn opens a new message that already contains the Contact's name and e-mail address in the message header. You can then type the body of the message and send it to the

intended recipient. A note indicating the date and time of the message is logged in the Contact's History section.

Selecting Your Preferred E-mailer

Before you can use Eudora Planner's e-mail function, you must first set the preferences to recognize your preferred e-mail application. Eudora Planner directly supports many popular e-mail applications, and indirectly supports any e-mailer compatible with Internet Config.

To choose the e-mailer recognized by Eudora Planner:

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

The Preferences dialog box appears.

2. In the **Internet Setup** area, click the **Mailer** pop-up menu, then select an e-mail application from the list.

If you selected Internet Config, see "Setting Preferences for Internet Config" on page 70.

3. Click **OK**.

Eudora Planner is set to open the selected e-mail application when you click an e-mail button.

Sending E-mail Messages

Once you've set Eudora Planner to recognize your preferred e-mail application, you can send messages to your Contacts.

To send an e-mail message to a Contact:

1. Double-click the Contact to whom you want to send the e-mail message.

The Contact Details dialog box appears.

2. Locate the appropriate e-mail address in either a connection field or custom field, then click the envelope button next to that address.

Your e-mail application opens, displaying a new message already addressed to the Contact.

3. Type the body of your message, then send it as you would any other message.

A note containing the date and time of the e-mail message is logged into the Contact's History section. The full message is also logged into your e-mail program's "outbox" or "sent mail" list, if the program contains such a feature.

Opening Web Sites from Contacts

When you enter a Web site address into a Contact field formatted for URLs, Eudora Planner

To open a Web site from within a Contact:

1. Double-click the Contact for which you want to view the attached Web site.

The Contact Details dialog box appears.

2. Locate the Web site address in either a connection field or a custom field, then click the envelope icon located next to the field.

Eudora Planner launches your preferred Web browser, which searches for, then 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, email address, and white pages listing—even a map to his or her 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 use QuickNet:

1. Select a Contact in the Address Book List View.
2. From the **Tools** menu, select **QuickNet**. Then, from the resulting submenu, choose one of the following options to find information about the selected Contact:
 - Select **Find E-mail** to find an e-mail address for the Contact
 - Select **Find Phone Number** to find a phone number for the Contact
 - Select **Find Zip+4** to find a nine digit zip code for the Contact
 - Select **Get Street Map** to get a map to the Contact's primary address

Eudora Planner launches your Web browser, which opens an Infoseek Web page displaying the information you searched for.

3. If necessary, enter the found information into the Contact record.

Setting Preferences for Internet Config

Internet Config is a useful freeware utility that allows Internet-enabled applications, such as Eudora Planner, to integrate with Internet-based applications, such as an e-mailer or browser. We install this utility with Eudora Planner to accommodate e-mailers and browsers not directly supported by Eudora Planner. This section explains how to set Internet Config's preferences so that Eudora Planner recognizes your preferred e-mail or browser application.



Internet Config is a freeware utility for the Macintosh. Although we ship this useful tool with Eudora Planner, it is neither developed nor supported by QUALCOMM, Inc.

1. From the **Define** menu, select **Preferences** to open the Preferences dialog box. Then, select **General**.
2. To use Internet Config to point to a Web browser or e-mail program, click either the **Browser** or **Mailer** pop-up menu, then select **Internet Config** from the

resulting list.

3. Click **Open Internet Config** to open the Internet Preferences dialog box. Then, click **Helpers**.

The Helpers dialog box appears.

4. To choose your preferred Web browser, select the **http** option. To choose your preferred e-mail program, select the **mailto** option. Once you've made your selection, click **Change**.

The **Add Helper** dialog box appears.

5. Click **Choose Helper**. In the resulting Open dialog box, navigate to find the browser or e-mailer, select it, then click **Open**.

The name of the selected browser or e-mailer appears in the Helper area of the Add Helper dialog box.

6. Click **OK** to close the Add Helper dialog box. Then, click **Add** to close the Helpers dialog box.

7. From the **File** menu, select **Quit**.

Eudora Planner is configured to recognize your Internet Config selection as the preferred browser or e-mailer.

Using Mail Merge

Eudora Planner's Mail Merge feature lets you quickly and easily merge Address Book data with existing merge templates or document files created in Microsoft Word or WordPerfect. You can merge your Contact data into a new word processing document, a printout, or a document automatically attached to an e-mail message sent by 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.

Mail Merge supports Word versions 5.x and 6 and WordPerfect version 3.5.x. The mail merge command and toolbar buttons are only available if you have one of these applications installed.

Before you can use the Mail Merge feature, you must create a template document with which to merge, as described in the next section. To use the Mail Merge feature with the document you've created, see "Merging Contact Data with a Merge Template" on page 73.

Creating a Merge Template

To use the mail merge feature, you must create a template document that accepts merge data from your Address Book. How you do this depends on the word processor you are using.

To create a Word 6 merge template for use with Eudora Planner:

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, in 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.
4. Click the **Get Data** button on the Mail Merge Helper dialog box, then select **Open Data Source** from the list that appears.

A directory dialog box appears.

5. In the directory dialog box, select **All Files** from the **List Files of Type** drop-down menu. Navigate to *Eudora Planner Folder:EP Support:QuickMerge Templates:Word 6*, then select and open the *Field Names* document.
6. Click the **Edit** button under **Main Document** in the Mail Merge Helper dialog box.

The Mail Merge Helper dialog box disappears, allowing you to edit the merge template document.

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 "Merging Contact Data with a Merge Template" on page 73.

To create a Word 5.x merge template for use with Eudora Planner:

1. Create or open the Word document you want to use as a mail merge template. If you're creating a new document, type in its entire text and then save it before proceeding to step 2.

2. From Word's **View** menu, select **Print Merge Helper**.

Word displays a directory dialog box.

3. In the directory dialog box, navigate to *Eudora Planner Folder:EP Support:QuickMerge Templates:Word 5*. Then, select and open the *Field Names* document.

Word adds a data field to the top of the open document, and the Print Merge toolbar appears in the document window.

4. Delete the data field that Word added to the top of the document.
5. Insert merge fields into your document by placing the cursor where you want a

field to be, clicking the **Insert Field Name** pop-up menu on the Print Merge toolbar, and dragging in the drop-down list it displays to select the Contact field you want to appear in that location. When you've inserted all the merge fields you need, save the document.

Your document is ready to be used as a merge template with Eudora Planner, as described in "Merging Contact Data with a Merge Template" on page 73.

To create a WordPerfect 3.5.x merge template for use with Eudora Planner:

1. Create or open the WordPerfect document you want to use as a mail merge template. If you're creating a new document, type in its entire text, then save it before proceeding to step 2.
2. Click the **Merge** button at the top of the document window to display the Merge bar.
3. Click the **Field** button on the Merge bar.
WordPerfect displays the Merge Field Number dialog box.
4. Select the **Field Name** option, then click **Get Field Names**.
The Open Data directory dialog box appears.
5. Navigate to *Eudora Planner Folder:EP Support:QuickMerge Templates:WordPerfect*. Select and open the *Field Names* document, then click **Names**.
The Merge Field Number dialog box reappears with the first field name, *FirstName*, in the box next to the Field Name option. You can click the button next to this box and drag to change the field name selected.
6. Click **OK**.
7. Insert merge fields in your document by placing the cursor where you want a field to be, click the **Field** button on the Merge bar, and in the resulting Merge Field Number dialog box, selecting a merge field from the list next to the Field Name option, then clicking **OK**. 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 Contact 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 Contact data with a merge template:

1. In the List View, select the Contacts you want to merge with the merge template. If you intend to merge all those appearing in the List View, you don't need to select any Contacts.
2. From the **Tools** menu, select **Mail Merge**.

A directory dialog box appears.

3. From the **Merge Using** pop-up menu, select the type of word processor you are using.
4. Select the merge template you want to use for the merge, then click **Open**.
Another directory dialog box appears.
5. Click **Save** to save the data source document. This document contains the Contact data to be merged with your merge template document.

Eudora Planner launches the word processor program and merges the template and data source documents. Your word processor displays the results in a document window.



If you are using Microsoft Word version 5, Eudora Planner launches Word 5 with the merge template document opened. You must perform a few additional steps to specify how Word should complete the merge. Continue with step 6.

6. From Word's **View** menu, select **Print Merge Helper**.
7. Select the data source document you saved in step 5, then click **Open**.
Word 5 displays the data source document and merge template document in separate windows.
8. Click the **Merge into New Document** icon on the Print Merge toolbar.
Word displays the results of the merge in a new document window.

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 **Duplicate Item** 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 **Clear** from the **Edit** menu. If you're using Eudora Planner in a workgroup setting, you cannot delete public Contacts for which you don't have delete permission.

Sorting Contacts in the List View

Each column in the List View represents a Contact field. You can sort the list by one or more columns.

To sort Contacts:

1. Click any column heading to select a column.
The Roman numeral I 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 additional sort columns, hold down the Shift key and click the column headings.
Roman numerals 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.

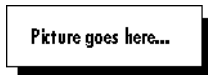
Setting Preferences for the Address Book

The Address Book preferences let you activate Eudora Planner's various data entry aids, choose your preferred software for faxing, emailing, Web browsing, and mail merging, and configure the contents of the Full Name field in the List View. You can change your Address Book settings by choosing **Preferences** from the **Define** menu, then clicking **Address** in the Preferences dialog box. Changes you make in this dialog box take effect after you click **OK**.

The Address Book Preferences dialog box contains tabs for Data Entry, Copy Contact, Dialing, and Miscellaneous preferences, each of which are described in the following sections.

Data Entry Preferences

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



Select **Data Entry Aids** to activate the automatic data entry features.

In the **Phone Formats** area, the **North America** and **International Phone Format** pop-up menus let you choose whether and how domestic and international phone

numbers will be automatically formatted when you enter them. If you need to create a custom format to suit your needs, select **Define** from the pop-up menu.

Immediately after you enter the company name for a new Contact, Eudora Planner's **Automatic address entry** 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 **Automatic address entry** check box to enable this feature.

Copy Contact Preferences

The Copy Contact feature lets you instantly copy a group of selected fields from a Contact to your Macintosh's clipboard. The Contact information can then be pasted to any kind of document.

Select a Copy Contact format from the **Format** menu to view, edit, or delete that format. The fields for that format appear in area below the menu.

To create a new format, click **New**. You can add a field to the format by clicking in the fields area, placing the cursor where you want the field to appear, then selecting a field name from the **Insert** menu.

To duplicate the selected format, click **Duplicate**. You can delete or rename the selected format by clicking either **Delete** or **Rename**.

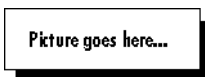
Select the **Copy short field labels** check box if you want abbreviated field names to appear with the information you copy using the Copy Contact feature.

Dialing Preferences

For information about setting the dialing preferences, see "Dialing Contacts" on page 66.

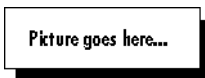
Miscellaneous Preferences

The **Full Name Style** preferences determine how a Contact's name appears in the Full Name field of the List View. Select **Salutations** and **Titles** if you want salutations and titles to accompany the name in the Full Name field.



Miscellaneous Preferences

The options on the Miscellaneous tab determine how field information appears in the Address Book's List and Detail views.



The **Date stamp** option determines the contents and format of date stamps you insert into Contacts.

The **Full Name** and **Listing** menus determine which Contact information appears in the Full Name and Primary Listing fields, respectively.

The **Date** menu the date format in the date stamps.

To have a log entry added to a Contact's History list each time you send them email, select the **Log email sent to contacts** check box.

The preferences in the **New Contacts** area determine the default settings of newly created Contacts. From the **Primary Address** and **Primary Connection** menus, select the default primary Address and Phone fields.

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 84.

Using Categories

Over time, as the amount of Eudora Planner data 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 in a workgroup setting, 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 **Define** menu, select **Categories**.

The Edit 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 Attribute dialog box appears.



Picture goes here...

4. In the **Name** box, type a name for the category.
5. To give the category a distinctive appearance, click the **Font** field to select a font. Specify the font size, style, and color, then select a **Justify** option. The

settings you select here will only affect Events having this category as their primary category (see “Changing the Primary Category” on page 83 for information about primary categories).

6. Click **OK**.

Eudora Planner adds the category to the Categories list. The category is available for you to assign to Events or Contacts, as described in the following section, or to Calendar and Address Book tabs, as described in “Assigning Categories to Tabs” on page 88.

Assigning Categories to Events and Contacts

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

Most often, you will assign or remove categories to and from individual Events and Contacts. However, Eudora Planner’s Address Book lets you add or remove categories to and from multiple Contacts simultaneously.

The following procedures describe the various methods involved.

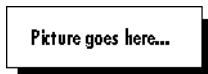
To assign categories to Events and Contacts:

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.



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 **Available 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** field and selecting a different category from the pop-up list.

4. Click **OK**.

The categories you select 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 **Available 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.

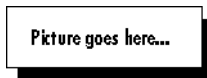
To assign a category to multiple Contacts:

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

- To select all Contacts on the current tab, from the **Edit** menu, choose **Select All**.
- To select a list of contiguous Contacts, 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, 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.



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. Choose the **Add the selected contacts** option.
5. Click **OK**.

The category is assigned to the Contacts you selected and appears 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. Choose the **Remove the selected categories** option.
5. Click **OK**.

The category is removed from the Contacts you selected and no longer appears 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—both those installed with Eudora Planner and 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 **Define** menu, select **Categories**.
The Edit Categories dialog box appears.
2. Click a category in the list, then click **Edit**.
The Modify Category 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 **Define** menu, select **Categories**.
The Edit 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 and is no longer available.



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

Using Tabs

Once you've added enough categories 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 tabs that display only those Events or 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 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 Contacts.

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

You can give a distinctive appearance to a tab when you select a style for it. See "Creating Tab Styles" on page 86 for more information.

Creating Tabs

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

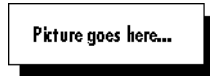
Creating Calendar Tabs

As you fill your Calendar with Events, you may want to better organize your information by creating Calendar tabs that display selected groups of categories. You can also create a Calendar tab that shows only Events that occupy time in your schedule, so that 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 **New Tab**.

The Tab Info dialog box appears.



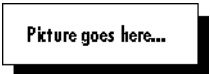
*You can create a new Calendar tab by control-clicking an existing tab, then selecting **New Tab** from the contextual menu that appears.*

2. In the **Name** box, type a name for the tab.
3. Click the **Style** field to select a style or, if desired, create and assign a new style.

For more information on creating styles for tabs, see “Creating Tab Styles” on page 86.
4. In the **Display events with these categories** list, select the Event categories you want to appear on the tab. To have this tab display all categories, click **Mark 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 **New Tab**.
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 86.
4. Check the **Display events that block time** box.
5. Click **OK**.

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

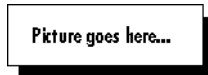
Creating Address Book Tabs

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 select which Contact fields appear in the List View.

To create an Address Book tab:

1. In the Address Book, from the **Tabs** Menu, select **Add New Tab**.

The Address Book Tab dialog box appears.



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

2. In the **Name** box, type a name for the tab.
3. In the **Display contacts with these categories** list, select the categories you want to appear on the tab.
4. 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 86.

6. 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.

The following sections describe how to assign tab styles to both Calendar and Address Book tabs.

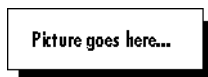
Creating Calendar Tab Styles

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 define a new Calendar tab style:

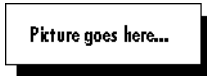
1. In the Calendar, from the **Define** Menu, select **Tab Styles**.

The Calendar Tab Styles dialog box 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:

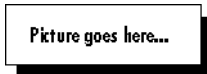
1. Open the Address Book. From the **Define** menu, select **Tab Styles**.

The Address Book Settings dialog box 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

This section explains how to give Calendar and Address Book tabs distinct

appearances by applying tab styles.

Assigning Styles to Tabs

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

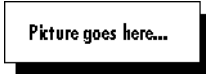
To assign styles to tabs:

1. Click the label of the Calendar tab to bring it to the front.
2. From the **Tabs** menu, select **Edit Tab**.
The Calendar Tab dialog box appears.
3. From the **Style Names** list, select a new style.
4. Click **OK**.
The tab's appearance changes to reflect the new style.

Assigning Categories to Tabs

You can specify which categories appear on Calendar and Address Book tabs. By creating tabs that show different sets of categories, you can create views of your Calendar and Address Book data for specific purposes.

To assign a category to tab:

1. Click the label of the tab to bring it forward. Then, from the **Tabs** menu, select **Edit Tab**.
The Tab Info dialog box appears. A check appears next to each category displayed on the tab.

2. In the **Display Events with these Categories** box, click the arrow next to the server containing the category you want to assign to the tab.
3. Click the checkbox of the category you want to include on the tab.
A check appears next to the category you selected.
4. Click **OK**.
The items associated with the category you select appear on the tab.

Chapter 5

Printing in Eudora Planner

Eudora Planner lets you print your Calendar and Address Book information to a wide 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 saving and reusing your print settings.

Selecting Print Settings

When you select the Print command from the File menu or toolbar, Eudora Planner displays the Print dialog box specific to the Calendar or Address Book—depending on whichever is currently active. You can select and save print settings specific to either the Calendar and Address Book. There, you can select the format to which you want

After you select a set of printing settings, you save it as a printing template to use in the future. To learn how to save your printing settings, see “Creating Print Templates” on page 95.

Printing from the Eudora Planner Calendar

Whether you need to print pages for a personal appointment book or create a simple calendar to be posted on a bulletin board, Eudora Planner provides you with many ways to print your Calendar information. You can print any of the Calendar views, including the To-Do List, to either standard-sized paper or to paper designed to fit into a personal organizer.

The following table describes the options available in the pop-up menus at the top of

the Print dialog box for the Calendar:

Use this menu	To...
Template	Select a print template, if you want to print using a set of preferences that you've configured previously.
Style	Choose the Calendar layout you want to print. There are different layouts available for each Calendar view, including the To-Do List. The style you choose here is applied to the paper type you select in the Paper menu.
Paper	Select the type of paper to which you want to print. You can choose to print to formatted paper designed to fit into an appointment book or personal organizer.

The following table describes the general options available in the tabs in the Print dialog box:

Use this tab	To...
Content	Set the date range of Events to print. The Form Preview area lets you see the style you've selected in the Style menu. If you are printing multiple pages, select the Print Empty Forms option to print dates, weeks, or months for which you have no scheduled Events.
Style Options	Select the font for Events in your printout. The options in this tab vary according to what you've selected in the Style menu.
Paper Options	Determine the margins of your printout, as well as the number of organizer pages you want to print to one sheet of paper. You can also select the option for double-sided printing.
Miscellaneous	Add a custom header and footer to your printout.



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, click either the **Day**, **Week**, or **Month** button, depending on the Calendar view you want to print. The selection you make here determines what options appear in the Style menu:
 - Select **Day** to see options for printing a Day View Calendar or To-Do List.
 - Select **Week** to see options for printing a Week or Multi-Day View Calendar.
 - Select **Month** to see options for printing a Month or Year View Calendar.
2. Click the **Style** pop-up menu to select the format of the printout; your selection appears in the Form Preview area. Then, click the **Paper** pop-up menu to select the type of paper to which you want to print.

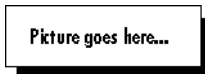
Eudora Planner prints directly to the formatted paper designed to be inserted into a number of popular personal organizers. Even if you are not printing to organizer paper, you can still select an organizer option here to create a printout that resembles the format of that particular organizer.

3. Select the **Content** tab to do the following:
 - To print Events within a standard range of dates, such as this week or this month, select **Standard**, then click the adjacent pop-up menu to select a range of dates.
 - To choose your own range of dates to print, select **Custom**, then enter a date range into the **From** and **To** boxes.
 - To include empty calendar pages in your printout, such as for those dates on which no Events are scheduled, select the **Print Empty Forms Also** option.
4. On the **Style Options** tab, select options to change text styles, if necessary. The options on this tab vary according to your selection in the Style pop-up menu.
5. Select the **Paper Options** tab to do the following:
 - To adjust the margins, change the settings in the **Margins** area.
 - To print a single calendar page across multiple sheets of paper, such as for a large calendar to be posted on a bulletin board, make adjustments in the **Print Across Sheets** area.
 - To print on both sides of paper, select the **Double-sided Printing** option.
6. Select the **Miscellaneous** tab to add a header and footer to the calendar pages.
7. Click **Print**.

Your Event information is printed according to the settings you specified.

Printing from the Address Book

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, Envelopes, or Labels—you can specify the following settings:

Use this menu	To...
Template	Select a print template if you want to print Contact information using a set of preferences that you've configured previously.

Use this menu	To...
Style	Choose the address book, envelope, or label layout you want to print. The selection you make here determines which Contact fields are printed and where those fields are positioned on the paper.
Paper	Select the type of paper to which you want to print. This can be plain sheets or formatted paper designed to fit into an appointment book or personal organizer.

The following table explains which options appear on each tab of the Print dialog box when you print Contact information:

Use this tab	To...
Content	Determine the range of Contacts to print. The Form Preview area lets you see the format you selected in the Style menu. When you print a paper address book, this tab also contains options that let you leave room for holes on the paper and to print empty pages.
Style Options	Select the font for the Contacts in your printout.
Paper Options	Set the margins of your printout when you are printing an, as well as the number of pages you want to print to one sheet of paper. You can also select the option for double-sided printing.
Miscellaneous	Add a custom header and footer to your address book pages.



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.

Printing a Paper Address Book

You can use the Eudora Planner Address Book to update and maintain the names and addresses in your a paper-based personal organizer. Eudora Planner can print your Contacts in formats that accommodate a variety of popular personal organizers.

To print a paper address book:

1. From the **File** menu, select **Print**.
The Print dialog box appears.
2. Click the **Style** pop-up menu to select an address book format.
3. Click the **Paper** pop-up menu to select the type of paper to which you want to print.
4. Eudora Planner prints directly to the formatted paper designed for a number of popular personal organizers. Even if you are not printing to organizer paper, you can still select an organizer option to create a printout that resembles the format of a particular organizer.

5. Select the desired options in the **Content**, **Style Options**, **Paper Options**, and **Miscellaneous** tabs.
6. If you want to save these settings as a template for future printouts, click **Save Template As** to give the template a name. For more information on printing templates, see “Using Print Templates” on page 95
7. Click **Print**.

Printing Envelopes

You can print your Contact information to various styles and sizes of envelopes.

To print an envelope:

1. From the **File** menu, select **Print** to open the Print dialog box. Then, click the **Envelope** button.
2. Click the **Style** pop-up menu to select an envelope format. The selection you make here determines how the Contact information is positioned on the envelope.

The format you select appears in the Form Preview area.

3. Click the **Paper** pop-up menu to select the type of envelope to which you want to print.
4. Select the **Content** tab, then choose one of the following options to determine the range of Contacts to print:
 - To print a standard range of Contacts, such as all in the Address Book or those currently selected, select **Standard**, then click the adjacent pop-up menu to choose an option.



*To print only those Contacts whose primary listing begins with a non-alphabetic character (such as a company name that begins with a number, rather than a letter), select the **Other** option.*

- To print a range of your choosing, select **Custom**, then enter a range in the adjacent boxes.
5. Select the **Style Options** tab, then select settings to determine the font characteristics of the information printed on the envelope.
 6. If you want to save these settings as a template for future printouts, click **Save Template As** to give the template a name. For more information on printing templates, see “Using Print Templates” on page 95
 7. Click **Print**.

The envelopes are printed according to the settings you’ve selected.

Printing Mailing Labels

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

To print mailing labels:

1. From the **File** menu, select **Print** to open the Print dialog box. Then, click the **Labels** button.
2. Click the **Style** pop-up menu to select a label format. This setting determines how the Contact information is positioned on the label.
The format you select appears in the Form Preview area.
3. Click the **Paper** pop-up menu to select the type of labels to print.
4. Select the **Content** tab. Then, in the **Contacts to Print** area, select one of the following to determine the range of Contacts to print:
 - To print a standard range of Contacts, such as every one in the Address Book or those currently selected, select **Standard**, then click the adjacent pop-up menu to choose an option.
 - To print a range of your choosing, select **Custom**, then enter a range in the adjacent boxes.
5. In the **Copies of each label** box, enter the number of label copies you want to print. Then, in the **Start printing with label on** boxes, enter the row and column where you want the first label to print.
6. Select the **Style Options** tab, then select settings to determine the font characteristics of information appearing on the labels.
7. If you want to save the settings you've made for future printouts, click **Save Template As** to create a printing template. For more information on printing templates, see "Using Print Templates" on page 95. Then, click **Print**.

The labels are printed according to the settings you've selected.

Previewing Your Printouts

Before you print from the Calendar or Address Book, you can use the print preview feature to inspect a printout for accuracy. If necessary, you can adjust the print settings, then preview again. Once you are satisfied with what appears in the preview, you can proceed to print.

To see a preview of a printout:

1. In the **Print** dialog box, select **Preview**.
The Print Preview dialog box appears, displaying an on-screen illustration of your printout.
2. If the printout has multiple pages, you can advance or backtrack through the pages by clicking the **Next Page** and **Previous Page** buttons.
3. To print the information displayed, select **Print**. To cancel the print operation, click **Cancel**.

Using Print Templates

To give your Eudora Planner printouts a consistent appearance, or to save time when you print new copies of your Event and Contact information, you can create print templates by saving particular settings you choose in the Print dialog box.

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

Creating Print Templates

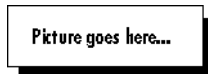
You can save a set of printing preferences if you want to reuse your printing settings, you can save them as a named template. After you save the template, you can have Eudora Planner reuse it when you want to print other Event and Contact information.

To save a print template:

1. Once you've specified your desired print options in the Print dialog box, click **Save Template As**.

A dialog box appears.

2. Type a name for the template.



3. Click **Save**.

Eudora Planner saves the template and makes it available from the **Template** pop-up menu. For details on how to use a print template, see the next section.

Printing from a Print Template

If you saved print settings, you can restore them to the Print dialog box by selecting them from the Template pop-up menu.

To print from a template:

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

The Print dialog box appears.

2. Click the **Template** pop-up menu to select a print template.

The Print dialog box changes to reflect the settings for that template.

3. Click **Print**.

Eudora Planner prints your Event or Contact information according to the settings of the print template.

Printing What Appears on the Screen

In either the Calendar or Address Book, you can bypass the Eudora Planner Print

dialog box to print exactly what appears on your screen.

In the Address Book, to print the current List View, select **Print Items** from the **File** menu. The generic print dialog box for your printer driver appears, where you can either adjust settings or just immediately click **Print**. Eudora Planner prints the Contacts that appear in the current tab. To print the Contacts on a different Address Book tab, select that tab to bring it to the foreground.

In the Calendar, the File menu command for printing the screen varies according to what Calendar view is displayed, or whether you've selected the To-Do List. For example, to print the Month View, display the Month View, then select **Print Month** from the **File** menu. To print the To-Do List, click somewhere in the list to select it, then choose **Print To-Dos** from the **File** menu.

Chapter 6

Importing and Exporting

Eudora Planner lets you import information from other calendar and contact management applications into your Calendar and Address Book. You can also import information from text files, and export your data to text files for use in other applications. This chapter explains how to get your existing data in and out of Eudora Planner.

Importing from Now Up-to-Date and Contact

If you are using the current, shipping versions of Now Up-to-Date and Contact, you can directly transfer your Event and Contact data into Eudora Planner. Eudora Planner will only import the Private data contained in your personal Up-to-Date and Contact databases. However, you can directly import public data from Up-to-Date and Contact server databases.

To import from 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.

A directory 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.

To import public data from Up-to-Date and Contact server databases:

1. From the **File** menu, select **Import**. Then, from the resulting submenu, select either **Public Event Database** or **Public Contact Database**.

A directory dialog box appears.

2. Navigate to find the Up-to-Date or Contact server database that you want to import, then select it.
3. Click **Open**.

Importing Events and Contacts from Text Files

Eudora Planner can import data from text files created by other applications. The import function lets you determine which fields to import and how those fields are mapped, and accommodates a variety of text delimiters.

To import Events or Contacts from text files:

1. From the **File** menu, select **Import**. Then, from the resulting submenu, select either **Events from Text** or **Contacts from Text**.

The Event Text Import or Contact Text Import dialog box appears, depending on the option you've selected.



Picture goes here...

2. In the **File Preview** area, select the check boxes for those fields in the text file that you want to import into Eudora Planner.
3. To map the fields in the text file to the appropriate fields in Eudora Planner, drag the field names in the **Import Fields** area to match them against the fields in the **File Preview** area.

You can add more fields to the **Import Fields** area by selecting a field title in the **Available Fields** area, then clicking **Add**.

4. In both the **Record** and **Field** areas, click the **Separator** pop-up menu to select the types of delimiters used in the text file.
5. Select the **Skip first record** and **Imported field values are quoted** check boxes as desired.
 - Select **Skip first record** to have Eudora Planner omit the first record in the text file when importing. You might choose this option if the first record contains unnecessary data, such as field titles from application that created the text file.
 - Select **Imported field values are quoted** if each instance of field data in the text file is enclosed by quotation marks. Choosing this option will cause Eudora Planner to omit those quotation marks when importing.
6. Click **Import**.

Eudora Planner imports the contents of the text file. The imported Events or Contacts appear in your Calendar or Address Book.

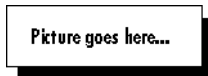
Exporting from Eudora Planner

You can transfer your Eudora Planner data to another application by exporting your Events and Contacts to a text file. Eudora Planner lets you determine exactly which fields to export, the order in which the fields are exported, and the text delimiters between fields and records. This flexibility allows you to tailor the text export for just about any other application that can import text data.

To export your Events and Contacts as text:

1. From the **File** menu, select **Export**. Then, from the resulting submenu, select **Events as Text** to export Events or **Contacts as Text** to export Contacts.

The Event Text Export or Contact Text Export dialog box appears, depending on which option you've selected.



2. Click the **Export** pop-up menu and select one of the following options:
 - If you are exporting Events, select **Local Events** to export only those Events that are local to your database, or **All Events** to export all Events that appear in your Calendar, including workgroup Events.
 - If you are exporting Contacts, select **Local Contacts** to export only those Contacts that are local to your database, or **All Contacts** to export all Contacts that appear in your Address Book, including workgroup Contacts.
3. To choose a field for export, select it in the **Available Fields** area, then click **Add** to move it to the **Export Fields** area. To change the export order, drag the fields in the Export Fields area to change their position in the order.
4. To determine how the text file is delimited (that is, how fields and records are separated from each other), in both the **Record** and **Field** areas, select an option from the **Separator** pop-up menu.



When importing, most applications expect text files to have Tabs between the fields within a record and Returns between the records themselves.

5. Select the **Export field titles as first record** and **Quote Fields** check boxes as desired.
 - Select **Export field titles as first record** to have field names export as the record in the text file.
 - Select **Quote Fields** to have quotation marks appear around each instance of field data in the text file.
6. Click **Export**.

A directory dialog box appears.
7. Enter a name for the text file, select its location, then click **Save**.

Your Eudora Planner data is exported to the text file, which is created in the location you selected. To inspect the contents of the text file, open it with a word processing application.

Chapter 7

QuickAccess

Eudora Planner's QuickAccess features give you access to your Calendar and Address Book information even when Eudora Planner isn't running. You can use these features to view, modify, and search your Events and Contacts without your having to Eudora Planner. QuickAccess consists of the QuickDay and QuickContact applets and their corresponding menu bar menus. This chapter describes the QuickAccess features in detail, including how to:

- Check your day's schedule and create or modify Events using QuickDay
- View, dial, e-mail, and create Contacts using QuickContact
- See and open Events and Contacts from the QuickDay and QuickContact menus

Using QuickDay

The QuickDay Menu

To view the QuickDay menu, click the **QuickDay** menu bar icon. A pull-down menu appears, containing the current day's schedule. The menu is divided into separate sections for each type of Event: Meetings appear at the top of the menu; To-Dos, in the middle; and Calls, at the bottom. The Meetings section is further broken down into two areas, where the top shows Meetings that occur before noon and the bottom shows those that occur after noon.

You can see the details for Event that appears in the QuickDay menu by selecting that Event's title in the menu. The Event Details dialog box appears, where you can modify the Event just like you would in Eudora Planner.

The commands at the top of the QuickDay menu let you open Eudora Planner and the QuickDay applet. For information about the QuickDay applet, see the following

sections.

The QuickDay Applet

QuickDay lets you view and navigate through your schedule without actually having to open Eudora Planner. By default, when you first open QuickDay, it displays the schedule for the current day. You can also use QuickDay to create new Events, attach reminders, documents, or Contacts to Events, and modify any fields in an existing Event. Any changes or additions you make in QuickDay are saved in Eudora Planner.

Picture goes here...

Viewing Events with QuickDay

You can use QuickDay to view Events scheduled on any day.

To view Events with QuickDay:

1. Click the **QuickDay** menu bar icon, then select **Open QuickDay** from the resulting menu.

The QuickDay window appears, displaying Events scheduled for the current date..

Picture goes here...

2. To see details for an Event, double-click it in the window.
The Event Details dialog box for that Event appears.
3. Click **Done** or **Cancel** to return to the QuickDay dialog box.
4. Use QuickDay's right and left arrow buttons to move backward or forward through your Calendar one day at a time.
5. Click the **Pick a date to view** button to see Events scheduled for a particular date.

The Choose Day dialog box appears with options that let you select a date. If necessary, you can select a different year by clicking the arrow keys adjacent to the year field. You can select a month by clicking a month name in the month list or by clicking the arrow keys adjacent to the header on the month-view calendar. Finally, to select a specific date, click a date in the month-view calendar. Once you've made your selections, click **OK**.

6. To close the QuickDay window, click **Done**.

Creating Events with QuickDay

You can use QuickDay to create any kind of Event. The Events you create here are saved to Eudora Planner and appear in your Calendar the next time you open it.

To create an Event with QuickDay:

1. Click the **QuickDay** menu bar icon to display the QuickDay menu. Then, select **Open QuickDay**.

The QuickDay window appears.

2. On the button bar at the top of the QuickDay window, click the button for the type of Event that you want to create.

An Event Details dialog box appears.

3. Enter details for this Event. For information on creating Events, see “Adding Events to the Calendar” on page 24.
4. Click **Save** to close the Event Details dialog box.

You are returned to the QuickDay window. Eudora Planner saves the Event, which appears in the Calendar and QuickDay.

Modifying an Existing Event with QuickDay

You can use QuickDay to modify existing Events.

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 necessary changes 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 are returned to the QuickDay window. Eudora Planner saves the changes you’ve made, which are reflected in the Calendar and QuickDay.

Creating Contacts with QuickDay

In addition to creating Events, you can also use QuickDay to create Contacts that are saved to 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 51.

3. Click **OK**.

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

Setting Preferences for QuickDay

You can set preferences for QuickDay from within Eudora Planner.

Setting the Display Preferences for QuickDay

You can control which Events appear in QuickDay by setting preferences based on category, Event type, and completion status.

To select what appears in QuickDay:

1. In Eudora Planner, from the **Define** menu, select **Preferences**.
The Preferences dialog box appears.
2. Click the **Calendar** button to view the Calendar preferences. Then, click the **QuickDay** tab.
The QuickDay preferences are displayed.
3. In the **Display Events with these Categories** area, select the Event Categories that you want to appear in QuickDay.
4. If you are using Eudora Planner for group scheduling, select the **Display Events that block my time** check box to have QuickDay display all Events that appear as busy time in your schedule.
5. To have QuickDay display To-Dos, select the **Display To-Dos** check box. Then, select the check boxes for the types of To-Dos that you want to be displayed.
6. To have QuickDay display Calls, select the **Display Calls** check box. Then, select the check boxes for the types of calls that you want to be displayed.
7. Click **OK**.
QuickDay is configured to display the Categories and Event types that you've selected.

Selecting a Default Category for QuickDay Events

You can select which category is automatically assigned to Events that you create with QuickDay.

To select the default category for the Events you create in QuickDay:

1. From the **Define** menu, select **Preferences**.
The Preferences dialog box appears.
2. Click the **Calendar** button to display the Calendar preferences. Then, select the **QuickDay** tab.
3. Click the **Assign Category to any new Events** pop-up menu to select a default Category.
4. Click **OK**.

The selected Category is set as the default primary Category for any Events you create in QuickDay.

Using QuickContact

QuickContact lets you have complete access to the information in your Address Book, even when Eudora Planner is closed. You can see a list of all your Contacts, find and view those Contacts that are most important to you, initiate phone calls and e-mail messages, and create new Contacts—all without starting Eudora Planner.



Picture goes here...

The QuickContact Menu

The QuickContact menu appears as a telephone icon in your Macintosh's menu bar and displays a menu that contains the Contacts that you've QuickContact lets you see 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 59). You can double-click a Contact in the list to open its details dialog box.

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

The QuickContact Window

Designating a Contact as a QuickContact

You can designate a Contact as a QuickContact from within the Contact Details dialog box.

To designate a Contact as a QuickContact:

1. In the Address Book, double-click the Contact you want to make a QuickContact.

The Contact Details dialog box appears.

2. Select the **QuickContact** check box.
3. Click **Save** to close the Contact.

The Contact is designated as a QuickContact and appears in the QuickContact menu.

Finding and Viewing Contacts in QuickContact

To find and view Contacts with QuickContact:

1. From the QuickContact menu, select **Open QuickContact**.
The QuickContact window appears.
2. To have QuickContact display either only the Contacts you've designated as QuickContacts or all your Contact

Creating Contacts with QuickContact

You can use QuickContact to 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 51.
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 email, 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 email 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 59, for more details.



*You can initiate a phone call to a Contact in QuickContact by control-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 messages to any Contact without opening your Address Book.

To email a Contact from QuickContact:

1. In the QuickContact window, select the Contact you want to email.



*You can send an email to a Contact in QuickContact by control-clicking that Contact, then selecting **Send Email** from the shortcut menu that appears.*

2. Click the **Send email to selected contacts** button.

Creating Events with QuickContact

QuickContact lets you create Meetings, To-Dos, and Calls without having to open your Calendar.

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 24.

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. Control-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.

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

4. Enter the appropriate information for the Event. For details on how to create Events, see “Adding Events to the Calendar” on page 24.

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

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

Chapter 8

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 workgroup 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 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 both to you and to 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 119 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 Group 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.



To log in to a workgroup server, you must know the server's IP address. 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 **Define** menu, select **Servers**.

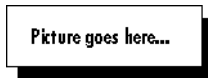
The Edit Servers dialog box appears.



Picture goes here...

2. In the Edit Servers dialog box, click **Add TCP/IP**.

The Internet Server Information dialog box appears.



3. Enter the IP Address of the server into the **Internet (IP) Address** field.
4. If necessary, change the value in the **Update Interval** field.
5. Click **OK**.

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 117.

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.

The first time you log into a workgroup server, you are prompted to set it as the home server. You should do so if it is the appropriate server. You can always change your home server later.

To change your home server:

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

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

2. Select the server you want to be your home server.
3. Click **Home Server**.

The selected server appears in bold, indicating that it is your home server.

4. Click **Done**.

This selected server becomes your home server.

Receiving Updates from the Server

Eudora Planner lets you specify how often your Macintosh 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 interval:

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

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

2. Select the server for which you wish to change the update frequency, then click **Change**.

The Internet Server Information dialog box appears.

3. In the **Update Interval** box, enter the desired interval, in minutes, between updates from the server.
4. 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 **Define** menu, select **Servers**.

The Edit 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.

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 Planner workgroup server, you must create a tab that subscribes to public categories

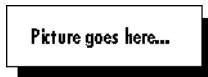
residing on that server. Also, if you configure the tab to have one of those public categories as its default category, then you can also use the tab to conveniently create your own shared Events and Contacts. Any Event or Contact created on such a tab automatically acquires that public category as its 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 **New Tab** from the **Tabs** menu.

The Tab Info 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 84 and “Creating Address Book Tabs” on page 85.

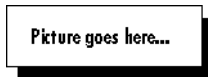


2. In the **Name** field, enter a name for the tab.
3. In the **Display Events with these Categories** area, select the public categories you want to appear on this tab. To automatically choose all the categories on a workgroup server, select the check box for that server.



4. Select a default category from the **Assign Category to any new Events/Contacts created on this tab** pop-up menu.
5. If this is a Calendar tab, select **Display Events that block my time** to have this tab show any Events that show as busy time in your schedule, regardless of their categories.
6. Click **OK**.

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



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 83.

Sharing Existing Events and Contacts

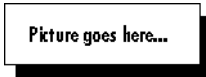
Even if an existing Event or Contact is presently residing on a tab that contains no

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 **Save**.

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

Creating Categories for a Workgroup Server

A Eudora Group Planner server usually contains a number of categories that are installed with the program, plus any categories created by the Eudora Group 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.

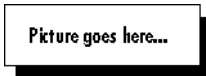


To create a category for a workgroup server, you must have Create permission for that server. Consult your Eudora Group Planner administrator to determine if you have this permission for categories.

To create a category for a workgroup server:

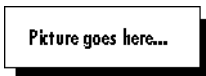
1. From the **Define** menu, select **Categories**.

The Edit Categories dialog box appears.



2. Select a server in the **Available Categories** area.
3. Click the **New** button.

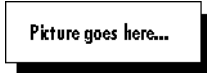
The Category dialog box appears.



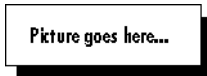
4. Type a name for the category in the **Name** box.


5. Change the font characteristics and background color, if necessary.
6. Click **OK**.

The category appears under the workgroup server's name in the Available Categories area.



The category also appears in the Assign Categories dialog box, which is opened 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 113.*

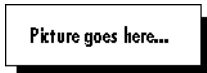
Creating Custom Fields for a Workgroup Server

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 **Define** menu, select **Custom Fields**.

The Custom Fields dialog box appears.



2. Click the **Servers** pop-up menu to select the workgroup server on which to store this 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.*

3. Click the **New** button.

The Custom Field dialog box appears.

4. Type 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 more information about field types, see “Using Custom Fields” on page 52.
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.

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.

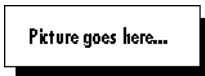
The first step in group scheduling is to create a Meeting Event. For details, see "Using Meeting Events" on page 25. Once you've created a Meeting, continue with the following section to add group scheduling information to that Event.

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:

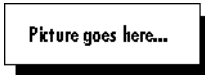
1. Double-click the Meeting Event to open the Meeting Details dialog box. Then, click the **Group Scheduling** tab.



*You can open a Meeting by control-clicking it in any Calendar view, then selecting **Details** from the contextual menu that appears.*

2. Click the **Invite** button.

The Invite dialog box appears.



3. To invite a user to the Meeting, select his or her name in the **Users, Rooms, etc.** 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.
4. Click **OK** 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.

Picture goes here...



If a user's time grid indicates that another Event conflicts with the meeting you're scheduling, you can view the conflicting Event by controlling 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.

5. 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 black) to a time when more people or resources are available. Or, to have Eudora Planner find a better time for you, click **Find Available**; 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.
6. On the **Meeting** tab, change the duration of the meeting in the **Duration** box, if necessary.
7. Click **Save**.

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. When another user tries to invite you to a Meeting that runs concurrently with the Event, the user will see that you are unavailable.



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 84.

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 119.

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 121.

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 122.

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 Group Planner

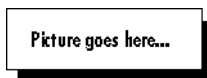
Before you can log in to a particular workgroup server, your Eudora Planner administrator must create a user account for you on that server. This user account consists of your user name and login password, the groups to which you belong, and your security profile—that is, the permissions you have for accessing, altering, and creating information and resources on the server. You are prompted to enter your user name and password when you first log in to a Eudora Planner workgroup 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 119.

To view the groups you belong to:

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

The Users and Groups dialog box appears.

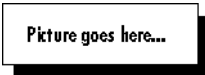


2. Click the **Servers** pop-up menu to display a list of servers to which you are connected, then select the server containing your user information.
3. In the **Users** (top) area, select your user name, then click the **Edit** button.

The Edit User dialog box appears.

4. Select the **Groups** tab.

The Member of area of this tab lists the name of each group of which you are a member.



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 six different types of security permissions.

Permission Type	When granted, lets you...
Create	Create new items on the server, including Contacts, Events, categories, and custom fields.
Delete	Delete items on the server.
Modify	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.
Change Privacy	Grant other Eudora Planner users permissions for your public information.
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 you and not to the original owner. When you take ownership of public Contacts and Events, you have full permissions for them, as if you had created them.



Security permissions created on a Eudora Planner server affect only those Events, Contacts, and categories 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 delete permission has been explicitly denied, you do not have delete permission on that server, even though you've been granted that permission as an individual user.

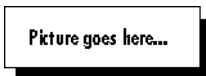
Conversely, if the Sales group has been granted delete permission, but you as an individual user have been denied that permission, then you do not have the ability to delete items on that server.

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:

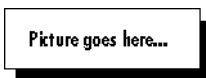
1. From the **Define** menu, select **Users and Groups**.

The Users and Groups dialog box appears.



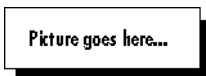
2. Click the **Server** pop-up menu to display the list of servers to which you are connected, then select the server for which you want to see your permissions.
3. In the **Users** (top) area, select your user name, then click the **Edit** button.

The Edit User dialog box appears.



4. Select the **Rights** tab.

This tab displays 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 **Done** to close the Edit User 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 122.

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 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 119 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 **Define** menu, select **Users and Groups**.
The Users and Groups dialog box appears.
2. Click the **Servers** pop-up menu to display the list of servers to which you are connected, then select the workgroup server on which you want to change permissions.

3. In the **Users** (top) area, select your user name, then click the **Edit** button.

The Edit User dialog box appears.

4. Select the **Privacy** tab.

This tab displays the name of every user or group that has permissions for your Events and Contacts and the particular permissions granted to each user.



Picture goes here...

5. Select a user or group for which you want to change permissions, then click the **Access** button.

The Permissions dialog box appears.



Picture goes here...

6. Choose the permissions that you want to grant the user or group. Select **Yes** to grant a permission or **No** 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.

7. Click **OK** to close the Permissions dialog box. Then, click **Done** to close the Edit User dialog box.

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.

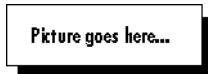
To set permissions for an individual Event or Contact:

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 dialog box appears, listing the names of user and groups that have permissions for this item and what particular permissions have been granted.



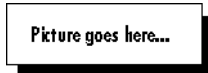
3. To give another user permissions for this Event or Contact, click the **Add** button.

The Users and Groups 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**.

The permissions you've granted to the user for this Event or Contact are reflected in the Object 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.

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, email 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, email 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 email message, or launch your Internet browser to open a Web page.

Messaging Application Programming Interface (MAPI)—The standard interface that allows email clients to pass information to an email messaging service. An email package must be MAPI-compliant in order to work with Eudora Planner’s email 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 email 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, email 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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