EXPLORING ORGANIZER

Lotus ORGANIZER

RELEASE 2.1

The Personal and Group Scheduling Standard

This manual was produced with Ami Pro.

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Chapter 1
Before You Begin

Welcome to Lotus Organizer® Release 2.1 for Windows®. This chapter lists the system requirements for using Organizer™. It also describes how to install and run Organizer for the first time, how to upgrade it from earlier versions, and how to start working with an Organizer file.

Ordering printed documentation

To order printed documentation for Organizer Release 2.1, call Lotus Customer Service and Information. In the U.S. call (800) 343-5414; in Canada, call (800) GO-LOTUS or (800) 465-6877.

Installing Organizer

The following information includes Organizer system requirements and step-by-step instructions for installing and using Organizer as a stand-alone application or as a networked application. If you are upgrading from Organizer Release 1.0 or 1.1 (Organizer 1.x), see “Upgrading and converting a file from Organizer Release 1.x,” later in this chapter, for instructions on automatically converting the files you created with these releases.

Note Organizer Release 2.1 includes new features for group scheduling on a local area network (LAN). You may need to contact your network administrator for special installation instructions for group scheduling.

System requirements

To run Organizer, you need the following:

- A 386-based computer that is certified for use with Microsoft® Windows 3.1 or later. A 486-based computer is recommended.
- A VGA monitor.
- A mouse, which is not required but strongly recommended.
- Microsoft Windows 3.1 or later.
- MS-DOS® version 5.0 or later.

- Random access memory (RAM) required with a minimum of 4MB; 6MB is needed for group scheduling with Lotus Notes®.
- Hard-disk space requirement is 8MB of available disk space on a stand-alone notebook (laptop) computer for a full installation.
- Hard-disk space requirement on a network file server is 8MB of available disk space for a full installation; installing Organizer to run from a network file server requires 2MB of available disk space on each user's desktop computer.

Note Each of the installation options also requires hard-disk space of approximately 2.5MB for files in a temporary directory. When installation is completed, these files are automatically deleted.

Before you start the Install program

Before you start the Install program, be sure you have the following:

- If you're installing Organizer as a stand-alone application, you need Organizer 2.1 Install Disks 1, 2, and 3 from your package.
- If you're installing Organizer to run on a network file server, you also need Organizer 2.1 Install Disks 1, 2, and 3. When you complete the file-server installation, users who have licenses to run Organizer can then install a network node from the file server.
- If you're an Organizer Release 1.x user and you want to convert your current 1.x files to Organizer Release 2.1 files, see "Upgrading and converting a file from Organizer Release 1.x," later in this chapter.

Note If you want to take advantage of the group-scheduling features, contact your network administrator or see Lotus Organizer Release 2.1 *Administrator's Guide* for special installation instructions.

Installing Organizer on a stand-alone computer

Before you can use Organizer, you must run the Organizer Install program to transfer the Organizer files to your hard disk. To install Organizer for the first time, or to return to Install later to add optional features or Help files you didn't install the first time, you must use the installation disks in your Organizer package. You must run Install from Windows 3.1 or later versions, and you must also be running MS-DOS 5.0 or later versions.

When you install Organizer as a stand-alone application on a notebook computer (laptop), the Install program stores the files Organizer needs on the hard disk of your computer. This takes up more disk space on your hard disk but it means that your Organizer files will always be available, even if you're not connected to the network.

Note The following procedure assumes you're starting Install from a high-density A drive. If you start Install from a different drive, substitute the letter of that drive in this procedure.

1. Insert the Install disk in drive A and close the drive door.
2. Open the Windows Program Manager and choose File - Run.
3. Type a:install in the Command Line text box and click OK.
4. Enter your name and company name and click Next, in the Welcome to the Lotus Organizer Install Program screen.

   Note The name you enter here will be recorded as the registered user for the software.
5. Install asks you to confirm that the names you entered are correct.
   - Click Yes to enter the names and display the next screen.
   - Click No to return to the previous screen in order to enter the names again.
6. Follow the instructions that appear on the screen.

   Install consists of a series of dialog boxes that are generally self-explanatory. If you need more information, use Help by clicking the Help button or pressing **ALT+H**.

Installing Organizer on a network file server

A network file-server installation should be performed by a network administrator or someone familiar with your company's or workgroup's PC network and with the right level of network access to create directories on a file server. If you are planning to install the Organizer 2.1 group-scheduling features, read the comprehensive installation instructions in Lotus Organizer Release 2.1 *Administrator's Guide.*

Note After you or a network administrator installs Organizer on a network file server, other licensed Organizer users must install a network node directly from the file server. Users can choose to either use the Organizer program, report, and layout files on the file server (which requires only 2MB of space on their computer's hard disk), or to fully install Organizer on their computer's hard disk (which requires 8MB of space) so they'll be able to use Organizer when their computer is not connected to the network.

To install Organizer on a network file server, you must run Install from Windows 3.1 or later versions and you must also be running MS-DOS 5.0 or later versions.

Note The following procedure assumes you're starting Install from a high-density A drive. If you start Install from a different drive, substitute the letter of that drive in this procedure.

1. Insert the Install disk in drive A and close the drive door.
2. Open the Windows Program Manager and choose File - Run.
3. Type a:install in the Command Line text box and click OK.
4. Enter your name and company name, in the Welcome to the Lotus Install Program screen.
5. Select Install on a file server.
6. Click Next.
7. Install asks you to confirm that the names you entered are correct.
   - Click Yes to enter the names and display the next screen.
   - Click No to return to the previous screen in order to enter the names again.

   Note The company name you enter here will become the company name that appears for all users installing from this file server.
8. Click Next to complete the file-server installation.

   You will be asked to supply additional information and make several configuration choices in the next set of Install screens to complete your network file-server installation. Follow the instructions that appear on the screen.

   If you need more information, use Help by clicking the Help button or pressing **ALT+H**.

Installing Organizer on a network node

Before you can use Organizer, you must run the Install program to transfer Organizer files to your hard disk. To install Organizer for the first time, or to return to Install later to add optional features or Help files you didn't install the first time, you must connect to the Organizer installation directory on your file server. If you don't know how to connect to the Organizer installation directory, ask your network administrator.

You must start Install from Windows 3.1 or later running with MS-DOS 5.0 or later.

When you install Organizer to run from a network file server on your PC or a notebook computer (laptop), you can choose to store all of the Organizer files on your computer's hard disk or use the Organizer files already installed on the network file server. Choosing the latter option takes up less than 2MB on your computer's hard disk, but you won't be able to use Organizer when your computer is not connected to the network.

1. Open the Windows Program Manager.
2. Choose File - Run.
3. Type x:\path\install in the Command Line text box and click OK.

   x:\path is the drive letter and path for the Organizer directory on your server. For example, type n:\org2\install to start Install from an Organizer directory named org2 on drive N.
4. Enter your name.
5. Click Next.

   The company name field will be filled in and dimmed, meaning you cannot change it.
6. Install asks you to confirm that the name you entered is correct.
   - Click Yes to enter the names and display the next screen.
   - Click No to return to the previous screen in order to enter the names again.
7. Follow the instructions that appear on the screen.

   Install consists of a series of dialog boxes that are generally self-explanatory. If you need more information, use Help by clicking the Help button or pressing **ALT+H**.

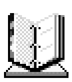
To convert files from a previous version of Organizer, see “Upgrading and converting a file from Organizer Release 1.x ,” later in this chapter.

Starting Organizer

Before starting Organizer, you must install it as described in “Installing Organizer,” earlier in this chapter.

Starting Organizer on a stand-alone computer

1. Start Windows and open the Windows Program Manager.
2. Open the Lotus Applications window (or the group window that contains Organizer).

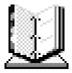


3. Double-click the Lotus Organizer 2.1 product icon.

   Organizer displays the program title screen briefly and then opens a new, untitled Organizer file to the current day in the Calendar section.

Starting Organizer when group scheduling is installed

1. Start Windows and open the Windows Program Manager.
2. Open the Lotus Applications window (or the group window that contains Organizer).



3. Double-click the Lotus Organizer 2.1 product icon.

   Organizer displays the program title screen briefly and, if you're using Organizer for group scheduling with Lotus Notes or cc:Mail, you may be prompted for your password. If you are a Notes user and you set a Notes user-ID password, you must enter your Notes user-ID password. If you are a cc:Mail user, you must enter your cc:Mail password.

   When you click OK, Organizer opens a new untitled Organizer file to the current day in the Calendar section.

   Note Organizer Release 2.1 group scheduling features require that you log in to your LAN before you start Windows. If you aren't logged in to your LAN, you can still run Organizer, but the group-scheduling features are disabled.

Creating, opening, and saving an Organizer file on a stand-alone computer

You can create a new file, open an existing or recently used Organizer file, and save a file on a stand-alone computer.

The first procedures listed, to create, open, and save Organizer files, are for users who are *not* installed for group scheduling. Later in this chapter, there are procedures to create, open, and save Organizer files for users who are installed for group scheduling.

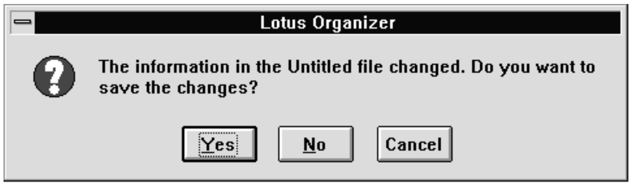
Note Organizer 2.1 has a new database format that uses the .OR2 default file extension. For information on opening and converting an Organizer Release 1.x file, see "Upgrading and converting a file from Organizer Release 1.x," later in this chapter.

Creating a new Organizer file on a stand-alone computer

When you first start Organizer, it automatically creates an untitled file that you can begin working in immediately.

However, you may want to create a new file. For example, you may want to create one file for your own Calendar, To Do entries, and Address entries and another file to track key events and milestones in a big project you and your team are working on.

1. Choose File - New.
   - If a file is already open and saved, Organizer closes the current file and opens a new untitled file.
   - If a file is already open and has not been saved, Organizer prompts you to save the open file before creating a new file.



2. Click one of the following:
   - Yes to save your changes to the file, close the current file, and then open the new file. If the file doesn't exist on disk, the Save As dialog box appears and lets you enter a file name.
   - No to close the current file without saving your changes and open a new file.
   - Cancel to return you to the current file.

Opening an existing file on a stand-alone computer

1. Choose File - Open.
2. Select the type of file you want to open from the List files of type drop-down box.

   For example, if the file is an Organizer 1.1 file, select Organizer Release 1.x (*.ORG). If the file is an Organizer 2.x file, select Organizer Files (*.OR2).
3. Select the file you want to open by doing one of the following:
   - Enter the file name in the File name text box.
   - Select the drive, directory, and file name of the file you want to open.
4. Click OK.

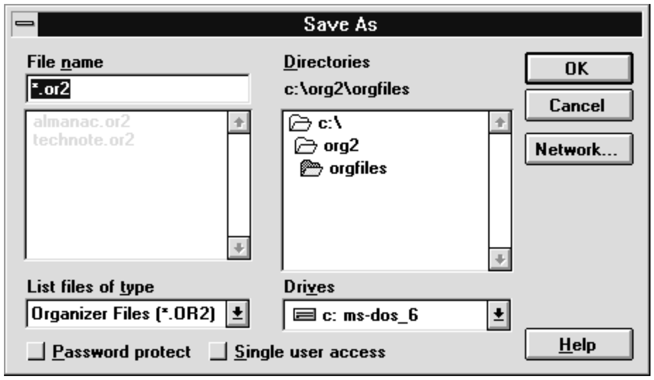
   Organizer opens the file.

Note If the file you want to open is an Organizer Release 1.x file, Organizer asks if you want to convert it to an Organizer Release 2.1 file. For detailed information on how to convert a file from a previous release of Organizer, see "Upgrading and converting a file from Organizer Release 1.x," later in this chapter.

Tip Organizer lists the five most recently used files at the bottom of the File menu. If you choose File and choose the file you want to open from the bottom of the File menu, Organizer saves the current file, closes it, and opens the most recently used file you selected.

Saving an untitled file on a stand-alone computer

1. Choose File - Save As.



2. Enter a new name in the File name text box.

   You can select different drives and directories in which to save the file using the Drives and Directories drop-down boxes.

3. Click OK.

4. If you enter a file name that already exists, Organizer asks whether you want to replace the existing file with the current file.

   - Click Yes to replace the existing file with your current file.
   - Click No to return to the Save As dialog box.

Tip To quickly save a file to its current name and directory, choose File - Save or click the File save icon.

Creating, opening, and saving an Organizer group-scheduling file

Organizer Release 2.x group-scheduling features let you invite other users on your network to group meetings as well as let you respond to meeting notices sent by others. After you are installed for group scheduling, you can create or open your group-scheduling file by using your network or e-mail name (for example, Joan Wagner) instead of opening an Organizer file by its file name (for example, JWAGNER.OR2).

Creating or opening a group-scheduling file

1. Choose File - Open.

The Open dialog box contains two tabs: File and Name, with the Name tab selected. To use the group-scheduling features, you must open your file by selecting your name from the list box.

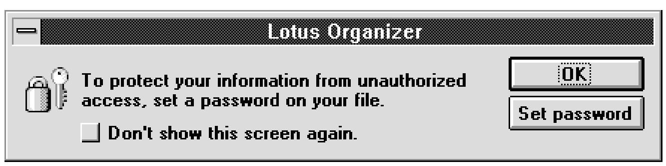
2. Select the appropriate user name or create a group-scheduling file by doing one of the following:

- Enter the user name (for example, your name) in the top text box.
- Scroll through the list of names until your name is selected.

3. Click OK.

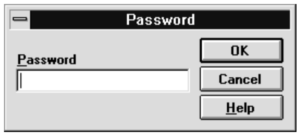
- If your group-scheduling file exists, Organizer opens the file.
- If your group-scheduling file doesn't exist, Organizer lets you convert an existing Organizer file to your group-scheduling file or create a new group-scheduling file. For information on how to convert an existing file, see "Upgrading and converting a file from Organizer Release 1.x, " later in this section.

If your group-scheduling file exists, but is not password-protected, Organizer lets you specify a password to protect your file from unauthorized access.



If you don't want to set a password and you don't want this screen to appear when you open the file again, select Don't show this screen again.

4. Click one of the following:
   - Click Set password to specify a password to protect the file.
   - If you click Set password, the Password dialog box appears.



   - Click OK to open the file without specifying a password.
5. Do one of the following:
   - Enter the password and click OK.
   - If you entered the password and clicked OK, the Verify Password dialog box appears.

   - Click Cancel to open the file without specifying a password.
6. Do one of the following:
   - Enter the password again to verify that you've entered it correctly, click OK, and click OK again to open the file.
   - Click Cancel to open the file without specifying a password.

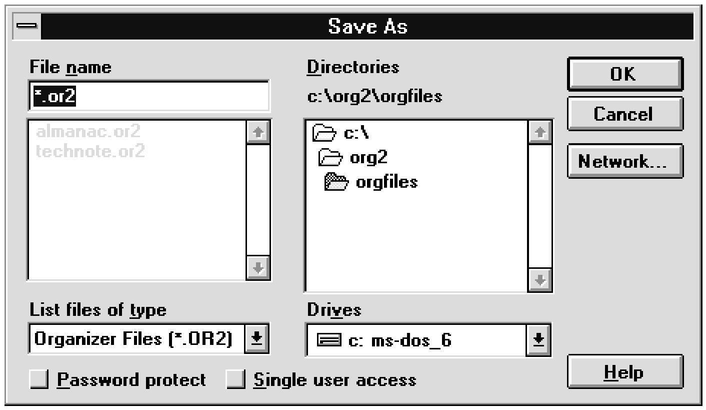
Note To open a file that is not used for group scheduling (for example, if your workgroup shares a file to track key events and milestones on a project), choose File - Open, click the File tab, and select the appropriate file.

For special information on converting .ORG files to Organizer Release 2.1 files, see "Upgrading and converting a file from Organizer Release 1.x," later in this chapter.

Saving an Organizer group-scheduling file

Organizer Release 2.1 automatically saves your group-scheduling file on the network after every change you make. However, you may want to copy your group-scheduling file to your notebook computer (laptop) in order to use it on a system not connected to the LAN, or you may want to copy your file to a diskette and use it with another computer (for example, at home).

1. Choose File - Save As.



Enter a new name in the File name text box.

You can select different drives and directories in which to save the file using the Drives and Directories drop-down boxes.

2. Click OK.

3. If you enter a file name that already exists, Organizer asks whether you want to replace the existing file with the current file.

- Click Yes to replace the existing file with your current file.
- Click No to return to the Save As dialog box.

Tip To quickly save a file to its current name and directory, choose File - Save or click the File Save icon.

Note If you make changes to a file on your computer and you aren't connected to the LAN, you can merge your changes into your group-scheduling file on the LAN by choosing File - Merge. For more information, see "Merging files," in Chapter 4.

Upgrading and converting a file from Organizer Release 1.x

Organizer Release 2.1 has a new file format and extension: .OR2. You can convert Organizer Release 1.x files to Organizer Release 2.1 files. When you convert a file, Organizer creates an Organizer Release 2.1 file and leaves the old file in its original format and location.

Note You don't need to convert Organizer Release 2 or 2.01 files. Organizer 2.1 automatically opens Organizer 2.x files.

In Organizer 2.1, when you open a file created in Organizer 1.x, you're automatically prompted to convert your file to the new file format. Organizer keeps the file information as it appears in the original version, except for the following:

- Address section information is converted into the new Street, City, State, and Country fields in Organizer 2.1 — if the Organizer 1.x information was entered in a standard format for US business addresses (for example, 55 Cambridge Parkway, Cambridge, MA 02142).
- All addresses without company names are converted to the home template (H tab) in Organizer 2.1. Addresses with company names are converted to the business template (B tab).
- Address-section information in an Organizer 1.x Type field is converted into the new Categories field.
- Phone log information is converted and inserted into the new Calls section.
- Organizer preferences (for example, Show Through settings) aren't converted, with the exception of the key in the Planner section.
- Repeating entries are converted as single, rather than repeating, entries.
- Anniversary entries are set to repeat annually on the same date.
- Included sections from other Organizer 1.x files aren't automatically included in the new Organizer 2.1 file. Only Organizer 2.x sections can be included in an Organizer 2.1 file.
- If your Organizer file included group meetings, Organizer 2.1 converts all your group meetings and maintains the list of chairperson and invitees to the meeting. You can then edit, cancel, or reschedule these group meetings as you need to.

Converting from stand-alone use of Organizer 1.x to Organizer 2.1 group scheduling

Organizer 2.1 has group-scheduling features that let you invite other users on your network to group meetings as well as let you respond to meeting notices sent to you by others.

Group Scheduling is available only if your network administrator has installed and configured Organizer 2.1 for group scheduling. After network installation, and node installation are complete, you can invite others to meetings and respond to meeting notices when you open your group-scheduling file. For specific steps on opening and converting an Organizer file from a stand-alone to a group-scheduling file, see “Creating or opening a group-scheduling file,” earlier in this chapter.

If the Organizer file you’re converting contains personal appointments, you will be able to create new personal appointments, as well as edit existing personal appointments to make them group meetings after you convert your file.

When you convert an Organizer Release 1.x file to an Organizer 2.1 file, the file size will increase. This change is due to the new file format that Organizer uses to provide a multiple-user, multiple-access database, so users, such as an assistant and manager, can share calendars and edit the same Organizer file simultaneously.

Instead of being locked out of a file until another user releases it, two people can work on the same file at the same time. For more information, see ‘‘Sharing sections from other Organizer files,’’ in Chapter 4.

To expedite the conversion process and ensure that Organizer 2.1 is working with a streamlined file, follow the procedure below.

Converting your Organizer 1.x file to Organizer 2.1

To convert your current Organizer 1.x file to Organizer 2.1, you must do the following:

1. Remove any included sections from the file.

   (See “Removing included sections,” below, for instructions on how to do this.)

2. Use Organizer 1.x Utilities to check and compress the file.

   (See “Checking and compressing your Organizer 1.x file,” later in this chapter, for instructions on how to do this.)

3. Open and save the file in Organizer 2.1.
4. Use Organizer 2.1 to archive any information you don’t need on a daily basis.

Note If you are currently using cc:Mail group scheduling in Organizer Release 1.x, you should make sure that your system administrator has updated your entry in the cc:Mail post office and hasn't made any changes to your file name.

Additionally, you must process all Organizer 1.x meeting notices that are in your cc:Mail inbox before you convert your file to an Organizer 2.1 file. Any meeting notices that remain or are delivered to your cc:Mail inbox after you convert from Organizer 1.x to Organizer 2.1, will need to be manually updated or entered into your Organizer 2.1 file.

Removing included sections

Included sections are sections that you share with other users. For example, you might have a To Do section in your current file that you share with an assistant or manager.

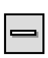
1. Start Organizer 1.x and open your file.
2. Make sure you are not currently in an included section. You can't remove an Organizer section if you are open to that section.
3. Choose Options - Customize.
4. Select an included section and click Remove.
5. Click Yes to confirm the deletion.
6. Repeat steps 3 - 5 for any other included sections.
7. When you are finished removing included sections, click OK.

Checking and compressing your Organizer 1.x file

You use Organizer Release 1.x Utilities to check and compress a file. If you can't find Organizer Utilities or have already deleted the files in your Organizer Release 1.x directory, call Lotus Technical Support at (508) 988-2500.

Note The procedure below explains how to start Organizer Utilities from within Organizer 1.x. You can also use the Windows Program Manager to start Organizer Utilities. From Program Manager, choose File - Run and select ORGUTILS.EXE in your Organizer 1.x directory.

1. Start Organizer 1.x.
2. Choose File - Close to close all open Organizer files.



3. Click the System menu in the top left corner of the Organizer window.
4. Choose Run.
5. Select Organizer Utilities and click OK.
6. Click Open and select your file.
7. Click OK.

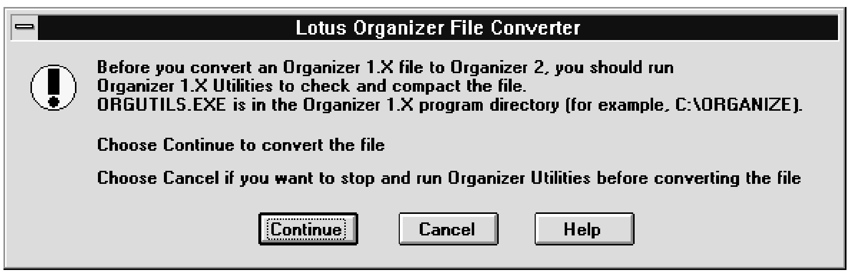
8. If Organizer finds any errors, click Yes to repair the file and then click OK to continue. If Organizer doesn’t find any errors, click OK to continue.
9. If Organizer prompts you to compact the file, click Yes. Click OK when the file compression is complete.
10. Click Save and then click Close.
11. Click Exit to leave Organizer Utilities.

Note By default, Organizer 2.1 displays files with the .OR2 extension in the File name list box. You may need to click the List files of type drop-down box and select Organizer 1.x (.ORG) to display your file.

Opening and saving the file in Organizer 2.1

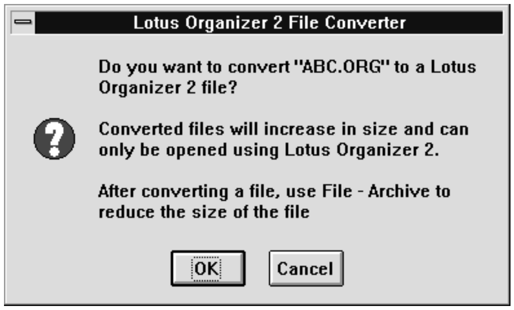
1. Start Organizer 2.1.
2. Choose File - Open.
3. If necessary, click the File tab.
4. Select Organizer 1.x (.ORG) from the List files of type drop-down box.

   You can also select different drives and directories in which to save the file using the Drives and Directories drop-down boxes.
5. Select your file.
6. Click OK to open the file.

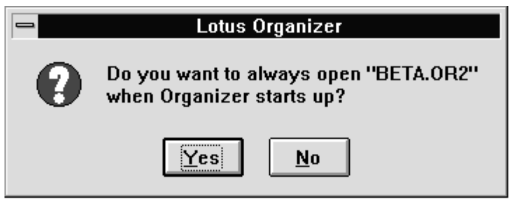


   Organizer reminds you to run Organizer 1.x Utilities to check and compact the file.
7. Click Continue.

Organizer asks if you want to convert the file to an Organizer 2.1 file.



8. Click OK to confirm that you want to convert the file.
9. Organizer converts the file and asks if you always want to open this file when Organizer starts up.



10. Click Yes if you want to open this file automatically every time you start Organizer. Click No if you don’t want to open this file automatically.
11. Choose File **-** Save.

For more information on opening a file in Organizer 2.1, choose Help - Contents, then click How Do I?, and select Using Organizer Files — by clicking the green text. Then, select Opening and saving files.

When you convert a file, Organizer changes the file extension from the Organizer 1.x extension (.ORG) to the Organizer 2.1 extension (.OR2). You *cannot* use this converted .OR2 file with Organizer 1.x. After conversion, your Organizer 1.x file still exists in its original format and location, however.

Archiving information

Organizer 2.1 lets you archive any information in your file that is not needed on a daily basis, for example, a previous year’s appointments or To Do tasks. You still have access to archived information; however, it is stored in a separate file. Archiving streamlines your Organizer file.

For more information on archiving information, choose Help - Contents, click How Do I?, and select Using Organizer Files — by clicking the green text. Then, select Managing files and then Archiving information.

Note Information from an Organizer 1.x phone log is converted to the Organizer 2.1 Calls section. If you used the autodialer feature, you may have a large amount of information that can be archived or deleted from the file.

For Organizer 1.1 users with cc:Mail group scheduling

If you are currently using the group-scheduling features Organizer 1.x with cc:Mail, you can convert your current group-scheduling file to an Organizer 2.1 group-scheduling file after you receive information from your network administrator on how to install Organizer 2.1, and after you get confirmation that you are configured as a group-scheduling user.

If your Organizer 1.x file included group meetings, Organizer 2.1 converts all your group meetings and maintains the list of meeting attendees. You can then edit, cancel, or reschedule these group meetings as you need to.

Note You must process all Organizer 1.x meeting notices that are in your cc:Mail Inbox before you can convert the file to an Organizer 2.1 file. Any meeting notices that remain or are delivered to your cc:Mail Inbox after you convert from Organizer 1.x to Organizer 2.1, will need to be manually updated or entered into your Organizer 2.1 file.

Ending an Organizer session

When you end an Organizer session, Organizer closes the active file and redisplays the Windows Program Manager window or returns you to another open Windows application.

Choose File - Exit Organizer. If you saved all changes to the current file, Organizer closes.

If you try to exit Organizer without saving your changes to a file, Organizer will ask you if you want to save your changes.

Chapter 2
What's New in Organizer Release 2.1

Organizer 2.1 offers major enhancements to its core personal information management features as well as new group-scheduling and shared-calendaring features for Lotus Notes and cc:Mail users.

This chapter lists the new features. For detailed information on these features, see Organizer Help. For information on how to use Help, see "Using Help," in Chapter 3.

Organizer 2.1 files use the .OR2 extension. When you open your Organizer 1.x file after installing Organizer 2.1, you will be prompted to convert the file. For information on converting files, see "Upgrading and converting a file from Organizer Release 1.x" in Chapter 1.

Calendar

You can now do the following in Calendar:

- Display and print a monthly view.
- Create conflicting and overlapping appointments.
- Create tentative appointments.
- Share a Calendar section with multiple users who can simultaneously access the same Organizer file.
- Merge Calendar changes to synchronize two different copies of your Calendar.

Group scheduling

You can now use the group-scheduling features to do the following:

- Choose group meeting attendees from the cc:Mail post office directory (cc:Mail users) or the Notes Name & Address Book (Notes users).

  Note If you don't use cc:Mail or Notes, you can still use group scheduling features with the single-server option, which creates its own directory of group scheduling users.

- View available free time by person or by group when you set up a meeting.
- Designate required or optional attendance for invitees.
- Attach a file to a meeting notice in a mail-based group-scheduling file, such as a group-meeting agenda.
- Respond to meeting notices (invitations, rescheduled meetings, and so on) in Organizer.
- If other cc:Mail users in your department or workgroup currently use Organizer Release 1.x for Windows or Lotus Organizer Scheduling for the Macintosh® Release 1.1, you, as an Organizer 2.1 user, can view free time and busy time, and schedule group meetings between any of these Organizer Release 1.x users and other Organizer 2.1 users.

Note If you're new to group scheduling, your Organizer group-scheduling file is maintained on your network. Open this file using your e-mail or network name. For more information on opening a file that you can use for group scheduling, see "Creating or opening a group-scheduling file," in Chapter 1.

To Do

You can now do the following in To Do:

- Enter a task without specifying a start date.
- Display tasks by priority, category, status, or date. For example, if you assign specific tasks to project categories, you can display your tasks grouped by project.
- Set alarms for tasks, including a snooze-alarm feature that lets you play the alarm again at a time you specify.
- Specify a completion date for tasks.
- Create tasks that automatically repeat at intervals you specify. For example, you can create a task that repeats every week.

Address

You can now do the following in Address:

- Enter business and home addresses for each person.
- Rename the field labels for the Address fields.
- Transfer Address information by using DDE with other applications.

Calls (new Organizer section)

You can now do the following in the new Calls section:

- Manage contacts by tracking incoming and outgoing calls.
- Display Call entries by status, date, company, category, or name.
- Automatically select names from your Organizer Address book to track incoming and outgoing calls.
- Create links to other entries.

Planner

You can now do the following in Planner:

- Change duration and move events by dragging and dropping them.
- Block off time in Calendar for Planner events.
- Display yearly and quarterly views.
- Automatically unfold the page when you turn to the Planner section.

Notepad

You can now do the following in Notepad:

- View pages by page number, creation date, or alphabetically by title or category.
- Customize page numbering and table of contents display.

Anniversary

You can now do the following in Anniversary:

- Create links to other entries.
- Set alarms.
- Create anniversaries that repeat once on the same date each year (for example, a birthday), or on different dates each year (for example, a holiday that falls on the fourth Thursday in November).
- Display anniversaries by year, month, category, or zodiac sign.

Selecting, entering, and editing information

You can now do the following to more easily select, enter, and edit infomation:

- Select single or multiple entries.
- Insert a new entry in any section, no matter what section is open. You can choose from the menu or click SmartIcons® to create entries.
- Edit entries directly on the Organizer page.

Navigating

You can now do the following to more easily move around in Organizer:

- Use either the mouse or keyboard to create entries, navigate sections, and so on.
- Use Edit - Go To to find a specific date in the Calendar section or name in the Address section quickly.

General

You can now use the following features in all Organizer sections:

- Use the new Lotus standard context menus. For example, when you're using Calendar, Appointment is a main menu choice; when you are using To Do, Task becomes a main menu choice, and so on.
- Press the right mouse button to display context-sensitive menus that offer shortcuts specific to the location of the mouse pointer and to the Organizer section that is open.
- Give controlled access to your file by maintaining the User Access List. For example, if you add your assistant's name to the User Access List and give that person assistant-level access, your assistant can schedule appointments and meetings for you. You can also use passwords to protect access to your file.
- Print professional-looking output that combines information from several sections. For example, print your Calendar appointments and To Do tasks in a trifold printout.
- In addition to the Calendar section, create repeating entries in the To Do, Calls, Planner, and Anniversary sections.
- Assign categories to any entry. For example, you can categorize several tasks on your To Do list under one project name.

- Set alarms or cost codes for appointments, tasks, calls, or Planner events.
- Specify your start-up preferences, such as automatically opening your Organizer file to today's date in Calendar.
- Customize your binder colors and designs.
- Customize your SmartIcons.
- Display a subset of entries by creating a filter.
- Archive information by date from individual Organizer sections.
- Merge local changes made in any section of a local Organizer file to the network version of that Organizer file. For example, you can copy your group-scheduling file to your notebook computer (laptop), make changes to your Calendar and / or To Do section, and then merge those changes into the Organizer file on the network file server.

Chapter 3
A First Look at Organizer

This chapter serves as a guide to explore Organizer. It is designed to encourage you to try various Organizer features. Use this chapter to

- Understand how to use each of the Organizer notebook sections and try out each one.
- Get ideas about how Organizer can help you in your own work.
- Learn a number of ways to use Help.

Note Help is a comprehensive source of online information that provides detailed instructions on all Organizer tasks.

What is Organizer?

Organizer uses the metaphor of a notebook to help you manage tasks you do every day, such as keeping track of appointments, scheduling meetings, making lists of things to do, and tracking phone calls. It's like a paper-based day planner you may already use to manage your time and work — in an electronic notebook with a tab for each section and pages you can turn.

It also lets you do things that you can't do with a paper-based planner. For example, it lets you create links that cross-reference information from one section to another. You can link entries in your Calendar to entries in your To Do list, or link entries in your To Do list to notes on projects and people. With Organizer, you can also share important information with co-workers across your local area network (LAN) and control when and if other users can access this information.

The Organizer notebook contains the following sections:

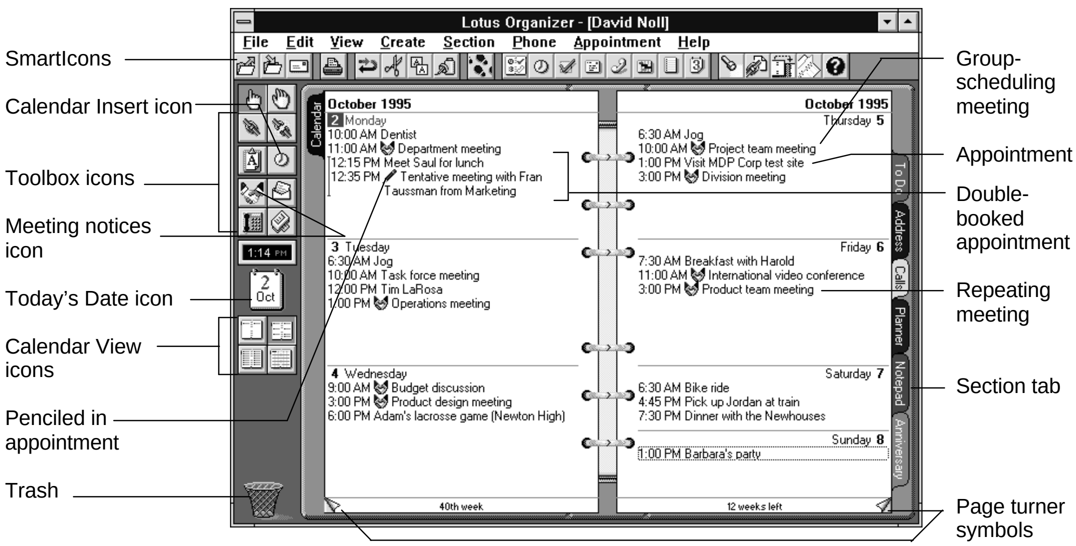
- *Calendar* to manage your time and view your appointments and meetings at a glance.
- *To Do* to track what you want to do and when you need to do it.
- *Address* to track names, addresses, and phone numbers as well as other important business and personal information.
- *Calls* to track important information on conversations with people, such as notes about the conversation, and time, duration, and status of the call.
- *Planner* to plan long-term projects and view them by year or quarter.

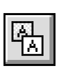
- *Notepad* to create notes, lists, reminders, memos, or anything you usually write on a piece of paper. You can also include graphics, such as charts, diagrams, and company logos.
- *Anniversary* to create a list of all the important dates you need to remember every year, such as birthdays and wedding anniversaries.

Besides using Organizer to stay on top of your personal appointments, tasks, and phone calls, you can also use it to make your assistant or work group more productive by sharing calendars, task lists, address books, and other critical pieces of information across your LAN.

Managing appointments

- You use Calendar to manage your time and view your appointments at a glance.





- SmartIcons — Provide one-click shortcuts to perform common Windows and Organizer functions and commands, for example, the Copy icon copies information to Clipboard.
- Calendar Insert icon — Click to create an appointment. You can also double-click any empty space on the Calendar page or press **INS** to create an appointment.
- Toolbox icons — Click to perform the most commonly used Organizer functions and commands.
- Meeting notices icon — Click to view meeting notices you've received.

- Today’s Date icon — Click to display the Calendar page for the current day.
- Calendar View icons — Click to display Calendar pages by single days, a week, 2 weeks, or a month.
- Penciled in appointment — Indicates a tentative appointment.
- Trash — Drag and drop any entries to the trash to delete them.
- Group-scheduling meeting — A meeting scheduled using Organizer’s group scheduling which can automatically schedule group meetings for two or more people working on the same LAN or connected LANs. For information on group-scheduling, see “Scheduling and responding to a group meeting,” later in this chapter.
- Double-booked appointments — Indicates two appointments created for the same time (for example, you can double-book appointments when you’re not sure which one you’ll attend).
- Repeating appointment — An appointment that repeats on a regular basis.
- Section tab — Click to open a notebook section.
- Page turner symbols — Click to display the previous or next page in the Organizer notebook.

Creating an appointment

To explore Calendar, enter your appointments for the week. Start by adding today’s appointments, then add the rest of your weekly appointments. If today’s date isn’t currently displayed, click the Today’s Date icon.

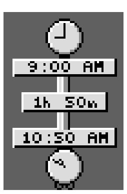
1. Click the empty space under the day you want to enter your appointment.

A list of times appears. To see other times, click the scroll arrows or press ↑ or ↓ on your keyboard.

2. Double-click the time you want to make the appointment.

The Create Appointment dialog box appears.

3. Enter a time or select the Time drop-down box to use time tracker to choose a time.



You can also enter a duration or click + (plus) to increase or - (minus) to decrease the duration time.

For more information on how to use time tracker, see “Setting the time and duration of an appointment using time tracker,” below.

4. Under Description, enter your description of the appointment.

5. Select the following options, if appropriate:

Option	*Result*
Warn of conflicts	Warns you when there’s a conflict with the appointment and another appointment or meeting.
Pencil in	Marks the appointment with a pencil icon.
Confidential	Makes the appointment confidential so others who have access to your file can’t view it.

6. Click Add.
7. Add more appointments by repeating steps 4 - 7.
8. Click Close.

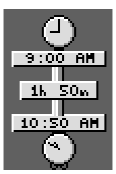
Moving to a specific date

1. Click the Calendar tab.

   The calendar for the current year appears with today’s date outlined.
2. Double-click the date you want to turn to.

Note To display the calendar for a different year, click the year Sort tab to the left or right of the current year calendar.

Setting the time and duration of an appointment using time tracker



You can use time tracker to change the start and end times of an appointment or to control the appointment’s duration.

1. Create an appointment or double-click an appointment you already created.

   The Create Appointment or the Edit Appointment dialog box appears.
2. Click the Time drop-down box to view time tracker and do one of the following:

To	*Do this*
Change the start time of an appointment	Drag the top clock of time tracker up or down.
Change the end time of an appointment	Drag the bottom clock of time tracker up or down.
Move the entire appointment to another time slot that day	Drag time tracker from the duration time (the bar that appears in the center).
Show times that are not currently in view	Click the black time tracker arrows at the top or bottom of the drop-down box.

Note When the time you select conflicts with another appointment, the green bar (which represents the duration of a meeting) turns red.

Creating a repeating appointment

Many of the appointments you make repeat on a regular basis. Organizer lets you enter appointments and specify when appointments repeat. Then Organizer creates all the repeating appointments automatically. For example, you can set an appointment to repeat every other week on Thursdays.

Use the steps below to create a repeating appointment that you attend on a regular basis, such as a weekly staff meeting or a regular lunch date.

1. Enter a new appointment or double-click an existing one.
2. Enter a description or change the existing description for the appointment.
3. Click Repeat.
4. Under Repeats, select how often your appointment repeats.

   For example, you can set an appointment to repeat weekly on Monday or every third Tuesday.

   Tip To set appointments that repeat regularly, but at different intervals, for example, a weekly meeting that meets on a different day each week, select Custom in the Repeats drop-down box, enter a date or select one in the Custom dates drop-down box, and click Add. Select another date and repeat the steps until you include all the dates for the repeating appointment.
5. Under Duration, select the following options, if appropriate:

Option	*Result*
Until	Indicates through what date the entry will repeat.
For	Selects a specific number of days, weeks, months, and years for the entry to repeat.

   Under Your selection, Organizer displays a full description of the repeating options you selected.
6. Click OK.
7. Click OK.

Tip To set the default duration for your appointments, as well as the start and end times for your work day, choose View - Calendar Preferences to select options. (To navigate to Calendar Preferences, you can also move the mouse pointer to the Calendar tab, click the right mouse button and choose Calendar Preferences.)

Setting an alarm

You can set an alarm to alert you when an appointment is coming up. The alarm plays a tune. Organizer can also display a message or launch a program when the alarm goes off. For example, you can set an alarm to play five minutes before the appointment, display a message reminding you to bring some information, and automatically open a word-processing file that contains the information you may need at a specified time.

Note To hear an Organizer alarm and display a message — even when you're using a program other than Organizer — leave the Organizer program open on your desktop.

To set an alarm

1. Enter a new appointment or double-click an existing one.
2. Click Alarm.
3. Under When, select the date and time for the alarm.
4. (Optional) For Message, enter a message you want to appear when the alarm goes off.
5. (Optional) Select the tune you want the alarm to play, from the Tune drop-down box.
6. Select the following options, if appropriate:

Option or command button	*Result*
Launch	Lets you specifiy the path and file name of the program to open when the alarm goes off.
Display alarm	Displays the message you entered in the Message text box when the alarm goes off.
Browse	Lets you search for the directory and file name of the program to launch when the alarm goes off. When you enter the file name, Organizer automatically enters it in the Launch text box.
Play	Plays the tune for the alarm that you selected from the Tune drop-down box.

7. Click OK.
8. Click OK.

Deleting entries

You can delete a single entry or a group of entries in Calendar or any other Organizer section by dragging and dropping them to Trash.

1. Select the appointment or appointments you want to delete.
   - To select a group of adjacent entries, select the first entry, press and hold **SHIFT** and select the last entry.
   - To select a group of entries that are not adjacent, press and hold **CTRL**, and select the entries you want to delete.

2. Drag and drop the entry to Trash or press **DEL**.

   Note Drag and drop means to click the entry, hold down the mouse button, drag the item to the desired location and release the mouse button.

   If you select more than one entry, you only need to drag and drop one of the items to Trash. Organizer deletes them all. If you're deleting a repeating entry, Organizer asks which of the repeating dates you want to delete.

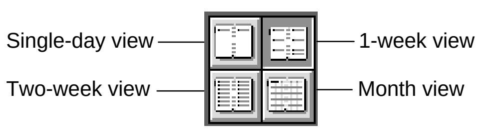
Tip To undo many actions you perform in the Calendar or other Organizer sections, such as copying, pasting, or deleting an entry, choose Edit - Undo or click the Undo icon. When you click Edit - Undo, the last action you performed appears after the word Undo in the command. For example, if you edited an appointment, the command is Undo Appointment Edit.

Exploring other things you can do with Calendar

Experiment with some of these additional tasks.

Displaying Calendar views

To display Calendar entries as a single day on each page, a one-week spread across two pages, a week on each page, or a month spread across two pages, click the Calendar View icons.



Editing an entry

To edit any Organizer entry, double-click the entry and change the information in the dialog box that appears.

To edit an entry directly on the page, select the entry and click the text area. When the blinking cursor appears, edit the entry.

Moving entries

To move an appointment to another day in your current Calendar view, drag and drop the appointment to the day you want to move it to. If it is a repeating appointment, you can select whether to change any of the other repeating appointments, too.

To move an appointment to another page, click the Pick up icon and select the appointment. The pointer turns to a hand holding a calendar. Go to the page you want to move the appointment to, and click where you want to move the appointment.

Booking conflicting appointments

If you created two appointments at the same time, Organizer warns you of the conflict and lets you change the appointment information in the Conflicting Appointment dialog box. If you decide to enter the appointment and a conflict still exists, Organizer displays them both with a red line to the left of the conflicting entries.

Changing how your Calendar looks

To select how your Calendar looks and how information appears, go to the Calendar section and choose View - Calendar Preferences. Organizer displays the Calendar Preferences dialog box. Use it to change how you want to display Calendar (by selecting options, under View), select what you want to appear with your appointments and meetings (by selecting options, under Show), or change the appearance and function of your Calendar (by selecting options, under Options). For example, you can select an option to display the end times for all your appointments.

For more detailed information

For detailed information on Calendar, choose Help - Contents, then click How Do I?, and select Appointments, Schedules, and Anniversaries — by clicking the green text.

Using Help

Although *Exploring Organizer* should give you a good start at learning how to use Organizer, it only touches on its capabilities. For comprehensive online information, you can use Organizer Help.

There are several ways to use Help.

Displaying Bubble Help

Bubble Help is the quickest way to get Help. When you move the mouse pointer over Organizer screen items, such as SmartIcons, Toolbox icons, or any place on the Organizer notebook, Bubble Help displays one-line descriptions of the item or gives you an instruction on how to use the item.

Note Bubble Help is available if you use a mouse but isn't available when a dialog box appears. Bubble Help is available for SmartIcons whether you turn on Bubble Help or not.

To turn on Bubble Help

1. Choose Help - Bubble Help, click the Bubble Help icon, or press **CTRL+F1**.
2. Move the mouse pointer to screen items, such as the SmartIcons, Toolbox icons, or a Calendar page.

   After a short delay, Organizer displays a bubble with help about the screen item.

To turn off Bubble Help, choose Help - Bubble Help, click the Bubble Help icon, or press **CTRL+F1** again.

Getting context-sensitive Help

Organizer provides Help based on the function or menu you're using. For example, if you're working in the Calendar section, you can go to a Help topic about using Calendar.

To get context-sensitive Help for Calendar

1. Click the Calendar tab.

2. Press **F1** or click the Help icon.

   Organizer displays Help for Calendar.

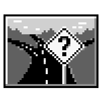
Getting Help on specific tasks

Choosing an item from the Help menu is most useful when you're not sure where to find the information you need. Help displays a series of pop-up menus that lead you from a general topic of information to more specific ones.

To use the Organizer Help menu, assume you need Help on how to create a Calendar entry.

1. Choose Help - Contents.

   Organizer displays icons that represent all the major Help topics. The How Do I? icon gives you Organizer topics with step-by-step procedures for each one.



2. Click the How Do I? icon.

3. Select Appointments, Schedules, and Anniversaries — by clicking the green text.

   Help displays the following window:

4. Under Calendar, select Making and changing appointments — by clicking the green text.
5. Select Making an appointment — by clicking the green text.

   Organizer displays Help on making an appointment.

Searching for Help using keywords

When the Help window is active, you can use the Search button to list Help keywords in Organizer to Help you search more quickly for a topic you select.

To do a keyword search, assume you need help on editing a To Do task.

1. Choose Help - Search or click the Help icon.
2. Click Search.
3. Type editing entries.
4. Organizer highlights “Editing entries” in the keyword list.
5. Double-click the topic Editing entries in the keyword list or click Show Topics.
6. Double-click Editing a To Do task.

   Organizer displays the topic Editing a To Do task.

Exploring other things you can do with Help

Experiment with some of these additional tasks.

Getting context-sensitive Help on dialog boxes

To get context-sensitive Help on each dialog box, click the Help button in the dialog box.

Using Help while you work with Organizer

You can display and work in your current Organizer file while a Help window is open. You can also resize and move the Organizer window or the Help window to make it easier to display and follow Help procedures while you are also looking at your Organizer file.

Printing Help topics

To print the current Help topic, click the Print icon at the top of the topic's Help window.

For more detailed information

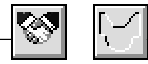
For complete information on how to use Help, choose Help - Using Help, or choose Help - Contents and click Using Help.

Scheduling and responding to a group meeting

Organizer's Calendar section can also assist you in automatically scheduling group meetings for two or more people working on the same or connected LANs. The process of scheduling a group meeting lets you view the free time of others you want to invite and choose a free time slot convenient for everyone.

You can also reserve a conference room, set up a repeating meeting, or even send file attachments, such as an agenda or a budget spreadsheet, along with the meeting invitation. When you receive a meeting invitation you can accept, decline, delegate it to someone else, or send a proposal for rescheduling the meeting to a more convenient date and time.

To schedule group meetings, be sure Organizer is set up to send out and receive group meeting notices. If you're not sure whether you have this capability, see your network administrator. One easy way to check if you are installed for group scheduling is to look for the Meeting notices icon in Toolbox. If the Meeting notices icon shows a pair of shaking hands, then you are ready to use the group-scheduling feature. If the Meeting notices icon doesn't show the shaking hands, then you should see your network administrator to set you up for group scheduling.



To open or create a group-scheduling file, see “Creating, opening, and saving an Organizer group-scheduling file,” in Chapter 1.

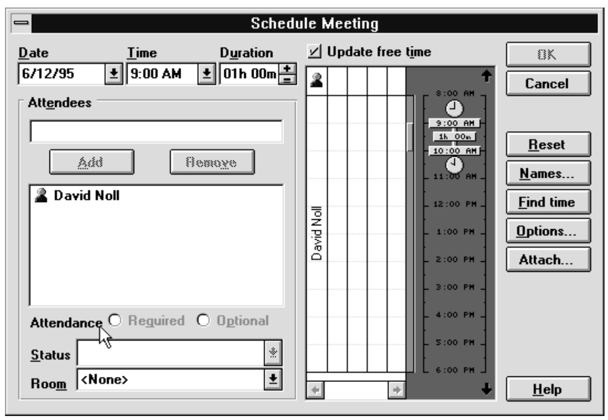
Scheduling a group meeting

When you schedule a group meeting, you become the chairperson of the meeting.

1. Click the Calendar tab and double-click the date for the group meeting.
2. Create an appointment.
3. Under Date and Time, enter the date and start time.

   If necessary, under Duration, enter the duration of the meeting.
4. Enter a description.
5. Click Invite.

   Organizer displays the Schedule Meeting dialog box.

   You’re listed as the chairperson because you initiated the meeting.

   Note If the Invite button is dimmed, you don’t have access to Organizer’s group-scheduling features. Contact your network administrator to make sure you’re properly set up. See “Creating or opening a group-scheduling file,” in Chapter 1, for information on opening a file for group scheduling.
6. Under Attendees, enter the people you want to invite to the group meeting, or click Names.

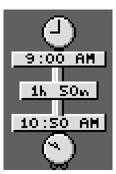
   If you’re using Organizer with cc:Mail or Notes and you click Names, Organizer displays a list of names. This is the same list you’re familiar with when you address an e-mail message in cc:Mail or in Notes. Select the name of each person you want to attend the meeting and click Add until you add all the names you want. When you finish adding names, click Close.

You can also select a cc:Mail mailing list or a Notes group name from the Names list box. You will be prompted to expand the list or group; if you answer Yes, all the people on the list or in the group will be added as invitees to the meeting. If you answer No, all the people on the list will receive only an e-mail notifying them of the meeting.

As you add attendees, Organizer displays attendee names in vertical time bars and displays information about each attendee's free and busy time. The time bar colors represent the following information:

Color	*Meaning*
Blue	Shows a person's busy time.
White	Shows a person's free time.
Gray	Indicates a person's free and busy time is unavailable or the person you selected is not an Organizer group-scheduling user.
Green	Indicates that the proposed meeting time is free for all required attendees.
Red	Indicates that at least one of the required attendees is not free at the proposed time.

7. (Optional) Select a room for the group meeting from the Room drop-down box.
8. If your meeting creates conflicts as you add attendees or specify a room, you may need to find another time slot. To find an appropriate time slot, you can



   - Scan the time bars for a time that's free for all attendees, then move the meeting there by dragging time tracker.
   - Change the date if there's no suitable time on the day you choose.
   - Click Find time to make Organizer find the next available time for all the attendees. If you don't like the time that Organizer finds, click Find time again or click Reset to revert to the original time and date of the meeting.
9. Click OK.
10. Click OK.

    Organizer sends an invitation to the attendees, requesting that they attend your meeting.

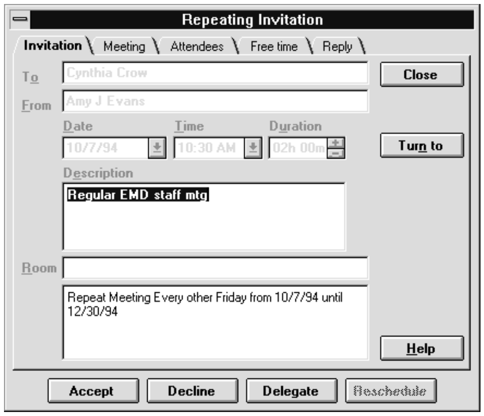
Tip For mail-based group-scheduling, you can attach a file to your meeting invitation. For example, you can attach a word-processing file with an agenda or a spreadsheet to a budget meeting. To attach a file, click Attach in the

Schedule Meeting dialog box, and enter the name of the file to attach, including the drive and directory if necessary.

Accepting an invitation

The hands in the Meeting notices icon move up and down to alert you when you receive meeting notices or to indicate that you haven't read all your meeting notices.

1. Choose File - Meeting Notices or click the Meeting notices icon.
2. Under Notices, double-click a group meeting to open it.



3. Review the details of the group meeting.

   Click the tabs to see additional information about the group meeting.

   - To specify the way the meeting appears in your Calendar only, click the Meeting tab. For example, under Description, you can enter personal information you want to include for this group meeting. This description is stored in your Calendar and will not be delivered to other attendees or the chairperson.
   - To see the names of the other people invited to the group meeting, click the Attendees tab.
   - To display the free and busy time of people invited to the group meeting, click the Free time tab.
   - To send a message to the chairperson with your acceptance, click the Reply tab.
4. Click Accept to put the meeting on your Calendar.
5. Click OK.
6. When you're done processing meeting notices, click Close.

Organizer automatically posts the group meeting to your Calendar and sends your acceptance to the chairperson, along with any message you entered.

Declining an invitation

1. Choose File - Meeting Notices or click the Meeting notices icon.
2. Under Notices, select a group meeting.
3. Click Open.
4. (Optional) Click the Reply tab.
5. (Optional) Enter a reply message.
6. Click Decline.
7. Click OK.

Organizer sends your response to the chairperson, along with any message you entered.

Assigning an assistant to schedule and respond to your group meetings

You can assign rights and responsibilities to an assistant when you schedule group meetings and process meeting notices. By granting Assistant access to someone, an assistant will have read and write access to your file. However, assistants can’t view or change entries that you mark as confidential, and assistants can’t make changes to the User Access List for your file.

1. Choose File - Organizer Preferences - User Access.

   The User Access dialog box appears.
2. Begin entering the name of the person who will act as your assistant in the text box.

   Organizer displays the full name when it recognizes it. To select a name from the list of network or e-mail users, click Names and select a name.
3. Select Assistant as the access level.
4. Click OK.

   Organizer tells you that you need to close and re-open the file for the changes to take place.
5. Click OK.

Tip When you have access to someone else’s file, you can include that person’s Calendar section(s) in your Organizer file. If the owner of the file gives you Assistant access privileges, you can make changes to the included section that Organizer automatically makes in the owner’s file. For more information on including a section from someone else’s file, see “Sharing sections from other Organizer files,” in Chapter 4.

Scheduling group meetings as an assistant

You can schedule a group meeting for someone else if you have Assistant access to the other person’s Organizer file. For information on access privileges, see “Assigning an assistant to schedule and respond to your group meetings,” in the previous section.

To schedule a group meeting for someone else, make sure you have Assistant access to that person’s file.

1. Choose File - Open.
2. Under Name, select the name of the person for whom you are scheduling the meeting.
3. Click OK.

   Organizer displays the Calendar section of the person for whom you are scheduling the meeting.
4. Schedule the meeting.

   See “Scheduling a group meeting,” earlier in this chapter.
5. Choose File - Open to return to your own Organizer file.
6. Select your name.
7. Click OK.

The meeting notice Organizer sends to attendees will include your manager’s name first, as the chairperson for the meeting, and your name in parentheses.

Responding to meeting invitations as an assistant

You can respond to a meeting for someone else if you have Assistant access to the other user’s Organizer file.

1. Choose File - Open.
2. Under Name, select the name of the person you are responding for.
3. Click OK.
4. Choose File - Meeting Notices or click the Meeting notices icon and respond to the invitations.

   For information on how to accept and decline invitations, see “Accepting an invitation” and “Declining an invitation,” earlier in this chapter.
5. Choose File - Open to return to your own Organizer file.
6. Select your name.
7. Click OK.

The response you send will include your manager’s name first and your name in parentheses.

Exploring other things you can do with group scheduling

Experiment with these additional tasks.

Sharing information with an assistant or a workgroup

With Organizer, an assistant can enter or change appointments for a manager — even while the manager is also making changes to appointments or entering other information. To give one or more users access to your Organizer file, choose File - Organizer Preferences - User Access and under People or groups, enter the names of those users you want to give access to.

Each user can be assigned one of the following access levels:

Access level	*Access privileges*
Owner	Full access rights, including read, write, customize and free-time access. Owners can access confidential entries, set or change passwords, and set the user-access level for other users. Owners can also delete a file.
Trustee	In addition to assistant rights, trustees can also customize the file. Trustees can't view or change confidential entries or set the user-access level for other users.
Assistant	Read, write, and free-time access. Assistants can schedule and respond to meetings in your file and change preferences. Assistants can't view or change entries that are confidential or set the user-access level for other users.
Reader	Read only access and free-time access.
Free time	Free-time and busy-time view of your Calendar for group-scheduling purposes; individual appointment details can't be viewed by others.
None	No access to your file.

When you can't attend a meeting

When you can't attend a meeting, Organizer lets you choose from a number of alternatives, such as delegating a meeting to someone else, proposing that the meeting be rescheduled, and so on. For information on these alternatives, choose Help - Contents; click How Do I?; and select Appointments, Schedules, and Anniversaries; then, select Responding to meeting invitations.

Checking how an attendee has responded to a meeting

As chairperson, you can check how an attendee has responded to a meeting by opening the meeting, clicking the Status button and looking at the symbol that appears next to their names.

Symbol	*Description*
	Chairperson of the meeting.
	Attendee was sent an invitation to the meeting.
	Attendee accepted an invitation to the meeting.
	Attendee declined an invitation to the meeting.
	Attendee penciled in the meeting.
	Attendee delegated the invitation to an appointee.
	Appointee was sent an invitation (another attendee delegated the invitation to this appointee).
	Appointee accepted an invitation to the meeting.
	Appointee declined an invitation to the meeting.
	Invitation was sent to a group.

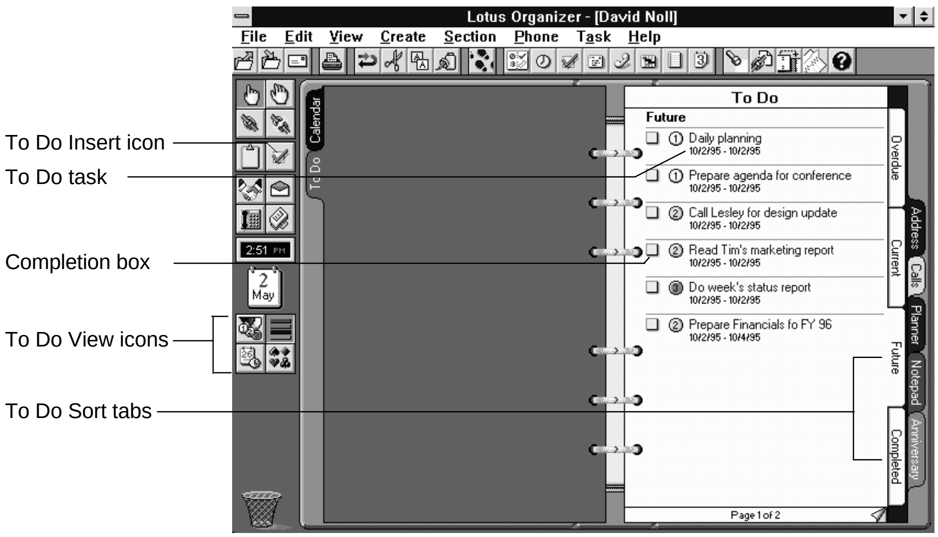
For more detailed information

For detailed information on other group-scheduling features (such as delegating a meeting to someone else or proposing a meeting change), choose Help - Contents; click How Do I?; and select Appointments, Schedules, and Anniversaries — by clicking the green text.

Creating To Do lists

The To Do section helps you track what you want to do and when you need to do it. As your ideas and projects evolve, you can add, update, or delete tasks to reflect your changes. As you proceed, Organizer tracks current, overdue, future, and completed tasks. It also tracks tasks by priority, date, status, and category.

The following illustration shows tasks sorted by status:



- To Do Insert icon — Click to create a task. You can also double-click any empty space on the To Do page or press **INS**.
- To Do task — By default, current tasks appear in green, overdue tasks in red, future tasks in blue, and completed tasks in black.
- Completion box — Click the box to indicate you completed the task. Organizer displays a check mark.
- To Do View icons — Click to display tasks by priority, status, date, or alphabetically by category.
- To Do Sort tabs — Depending on the View icon you select, click to display entries sorted in each view. For example, if you're viewing your To Do tasks by status, the Overdue, Current, Future, and Completed Sort tabs appear.

Creating To Do tasks

When you create a task, you can give it more than just a description. You can assign categories to group tasks by project, person, and so on. You can also give each task a priority, or specify start and finish dates. To use To Do, enter some tasks you need to complete.

1. Click the To Do tab.
2. Double-click any empty space on the To Do page.
3. Under Description, enter a description of the task.
4. Enter a start and due date for the To Do task or click the Start and Due drop-down boxes to select dates.
5. Select the following options, if appropriate:

Option	*Result*
Category	Assigns a category to a task. For example, you can enter “Administrative” as a category for a task, such as doing status reports. When you add a category to any Organizer section, it becomes available to use as a category in other Organizer sections, too.
Priority	Lets you select the priority rating 1, 2, 3, or No priority.
Confidential	Lets you keep others from seeing your To Do tasks if they have access to your file. For information on how to give other users access to sections of your Organizer file, see “Sharing information with an assistant or a workgroup,” earlier in this chapter.

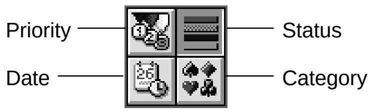
6. Click Add.
7. Add more tasks by repeating steps 3 - 6.
8. Click Close when you finish adding tasks.

Exploring other things you can do with To Do

Experiment with some of these additional tasks.

Displaying your To Do list in different views

To view To Do tasks by priority, status, date, or category, click the appropriate View icon. Then, click the sort tabs to see how the tasks are listed. For example, select the Priority View icon, and then click the 2 sort tab, to see your priority 2 To Do tasks listed.



Creating repeating tasks

To list tasks that repeat at regular intervals, such as a status report you must write every Monday, create a task or double-click an existing task, enter a start and due date, and click Repeat. Enter the repeating pattern in the same way you entered a repeating appointment in “Creating a repeating appointment,” earlier in this chapter.

Quickly paging through tasks

To page through To Do tasks one page at a time, use the Page turner symbols. Organizer skips blank pages — where there are no entries.

Displaying completed tasks with a line through them and a date

To display completed tasks with a line through them, go to the To Do section, choose View - To Do Preferences, and under Options, select Show completed tasks (if it’s not already selected) and select Strikeout. To display the date you completed the task, under Show, select Completed date.

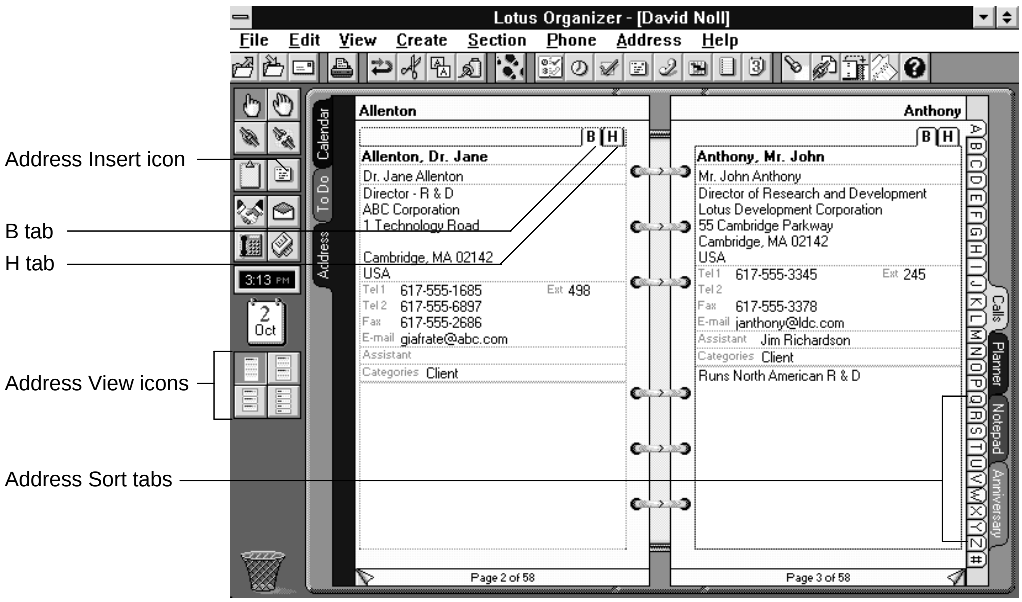
For more detailed information

For detailed information on To Do, choose Help - Contents, click How Do I?, and select To Do Lists and Notepad Pages — by clicking the green text.

Creating an address book

You can use the Address section to track and quickly retrieve people's names, addresses, phone numbers, and other related information. You can enter the address for each person's entry by using the home (H) and business (B) Address tabs.

The following illustration shows address information you can enter for a person in the Address section:



- Address Insert icon — Click to create an address entry. You can also double-click any empty space on the Address page or press **INS**.
- B tab — Click to see business information.
- H tab — Click to see home information.
- Address View icons — Click to display all, address, contact, or phone number information.
- Address Sort tabs — Depending on the sort order you select (last name, company, category, and so on), click to display Address records sorted in each view (alphabetically or by number). For example, if you're viewing your Address records by last name, click the N Sort tab to display all records with last names starting with N.

Creating an Address record

You create an Address record the same way you create entries in other sections. You can enter business and home addresses, multiple phone numbers, business and home fax numbers, e-mail addresses, notes, spouse and children's names, and so on.

1. Click the Address tab.
2. Double-click any empty space on the Address page.
3. Click the Business tab to enter business or the Home tab to enter home information.
4. Enter information in the fields that are appropriate for your entry.

   To move quickly from one field to another, press **TAB**. To move backward, press **SHIFT+TAB**.
5. Click Add.
6. Add more Address records by repeating steps 3 - 5.
7. Click Close when you finish entering information.

Tip If you have more than one contact at the same company, you can automatically copy information from that contact's Address record to another, so you don't have to re-enter the same information over and over.

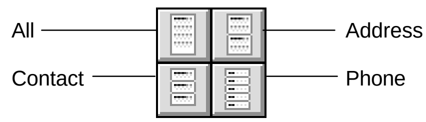
To copy the information, press **TAB** after you enter the company name. When the Similar Address Found dialog box appears, select the company you want, and click OK. Organizer automatically fills in the street address, city, country, zip or postal code, phone, and fax fields for the new Address record. Click OK to enter the Address record.

Exploring other things you can do with Address

Experiment with some of these additional tasks.

Displaying Address records in different views

To view Address records by all information associated with the Address record, or by address, contact, or phone number, click the appropriate View icon. Then, click the appropriate Sort tab to see how the addresses are listed. For example, click the Address View icon, and then click a Sort tab, to see address information for the people whose last name begins with the letter you selected.



Sorting Address records by different fields

To sort Address records by zip or postal code, country, category, and so on, choose View - Address Preferences, and select one of the options under Sort by. To change sort fields, Under Sort by, click the drop-down box and select a different field. For example, select Zip code and then click the Zipcode Sort icon. Organizer then sorts addresses by Zip code.

Renaming fields

To rename the default fields, choose View - Address Preferences and click Fields. Under Fields, select the field whose name you want to change, and enter a new name, under Label. For example, you can change Unused 1 to ID number. When you change a field name, it changes that field for all Address records in your current Address section. If you created other Address sections, this field change won't appear in the other Address sections.

For more detailed information

For detailed information on Address, choose Help - Contents, click How Do I?, and select Names and Addresses — by clicking the green text.

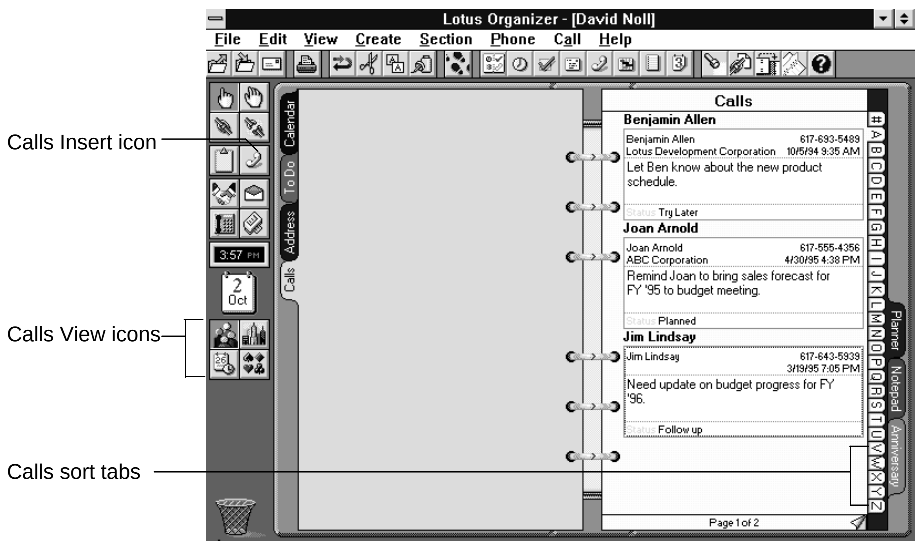
Tracking your calls

The Calls section lets you track your phone calls. You can

- Record both your incoming and outgoing phone calls, including information on who the call was from or to, the duration of the call, and any notes on the call.
- Track the status of all calls.
- Schedule calls to make at a future date and time.
- Set an alarm to remind you when to make a call.
- If you have a modem and can connect a phone cable from your modem to your telephone, then Organizer can automatically dial any phone number that appears in the Calls section.

The Calls section is integrated with the Address section. When you create a Calls entry, you can access name, company, and phone number information that already exists in your Address section. This information will be automatically entered in your new Calls entry.

The following illustration shows Calls entries sorted by person:



- Calls Insert icon — Click to create a Calls entry. You can also double-click any empty space on the Calls page or press **INS**.
- Calls View icons — Click to display Calls information by person, company, date, or category.

- Calls Sort tabs — Depending on the View icon you select (by person, company, date, or category, and so on), click to display Calls entries sorted in each view. For example, if you're viewing your Calls entries by company, click the L Sort tab to display all your Calls entries with companies that begin with L.

Creating a Calls entry

To create a Calls entry, you record information from a call you recently made.

1. Click the Calls tab.
2. Double-click any empty space on the Calls page.
3. Enter a date or select one from the drop-down box.
4. Select the duration of the call.

   To specify the duration of the call, enter a number for Duration, or click the Time drop-down box and drag the top and / or bottom clocks on time tracker to set the start and end times of the call. You can also move the duration bar, in the center, to change the beginning and ending time of the call without changing the duration. For information on using time tracker, see "Setting the time and duration of an appointment using time tracker," earlier in this chapter. When you select the time using time tracker, Organizer indicates the duration of the call in the Duration box.
5. Enter a name, company name, and phone number for the call.
6. Under Notes, enter a description of the call.
7. Select the following options, if appropriate:

Option	*Result*
Status	Lets you specify the type of call (planned, answered, incoming, and so on).
Stopwatch	Keeps track of the call's duration. Click the watch to start the stopwatch. Click it again to stop it.

8. Click Add.
9. Add more Calls entries by repeating steps 3 - 8.
10. Click Close when you finish entering calls.

Exploring other things you can do with Calls

Experiment with some of these additional tasks.

Recording follow-up calls

To record a follow-up call, double-click anywhere on a Calls entry and click Follow up. Enter information in the Create Follow Up Call dialog box. When you click OK, Organizer displays a follow-up call entry as a new entry in the Calls section.

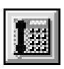
Setting an alarm

To set an alarm to remind you of a call you need to make, create the call or double-click an existing call and click Alarm. Enter the alarm in the same way you entered an alarm in “Setting an alarm,” earlier in this chapter.

Dialing a call automatically

To dial a call automatically, create a new call or open an existing one, select a phone number from the Numbers drop-down list, and click Dial. Organizer dials the number.

Note To dial a phone number automatically, you must have a modem and a phone cable that connects your modem directly to your telephone.



For more information on dialing calls, choose Help - Contents, click How Do I?, and select Phone Calls, or click the Phone icon and click Help.

Creating a To Do task from a Calls entry

To create a To Do entry from a Calls entry, for example, if a call generates a task you need to do, drag and drop the Calls entry to the To Do tab. Organizer moves the Calls entry from the Calls section and enters it as a To Do task.

Quickly logging an incoming call

To quickly log an incoming call, choose Phone - Incoming Call. Organizer displays the Create Call dialog box and automatically marks the status of the call as Incoming.

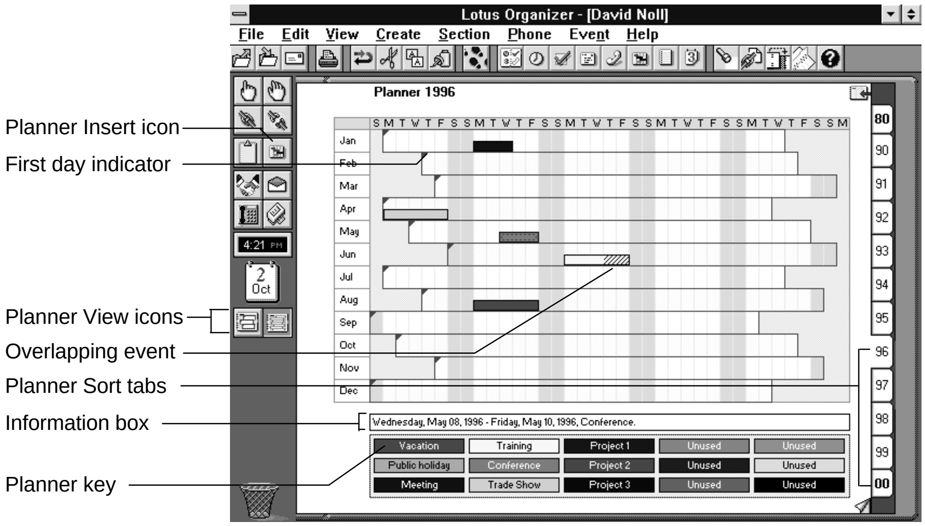
For more detailed information

For detailed information on Calls, choose Help - Contents, click How Do I?, and select Phone Calls — by clicking the green text.

Tracking events in Planner

Planner helps you to schedule and prepare for events that last all day or for more than one day. With Planner, you can designate blocks of time for a particular activity, such as a vacation, an off-site meeting, or a conference. Planner looks just like a project planner wall chart where you mark events, or milestones with color blocks or strips. Planner helps you mark important events that already happened, and schedule and prepare for important events that will happen later in the current year or in years ahead.

The following illustration shows some of the basic Planner components:



- Planner Insert icon — Click to create a Planner entry. You can also double-click any date on the Planner page or choose a date and press **INS**.
- First day indicator — Marks the first day of each month.
- Planner View icons — Click to display Planner by year or quarter.
- Planner Sort tabs — Depending on the View icon you select, click to display Planner entries sorted in each view. For example, if you are viewing your Planner entries by quarter, four Sort tabs appear for each quarter in the year you select (namely, Q1 1995, Q2 1995, Q3 1995, Q4 1995).
- Information box — Move the mouse pointer over the Planner chart to see the dates change here. If you insert an event, the name of the event appears with the date. If you move the mouse pointer over a Planner key, the event description and the total number of days for this event appear.

- Planner key — Displays a color key with event descriptions, such as a vacation or trade show. To change the description, double-click a key and enter the new description.

Creating a Planner event

To use Planner, enter a vacation as an event.

Entering an event

1. Click the Planner tab.
2. Click the event type (or key name) in the Planner key, for example, Vacation.
3. Move the mouse pointer to the date you want to start the event.

   The mouse pointer changes to a pen tip.
4. Press and hold the mouse button while pointing to the start date for your event and drag the pen tip to the date where you want the event to end. When you release the mouse button, the date your pointer is on will be your end date.

   Organizer draws the event color strip on the Planner.

Tip To enter more information than just the date and event type, double-click the event (or color strip) and enter the additional information in the dialog box as you did in other Organizer sections.

Booking Planner events in your Calendar

To help prevent conflicting events and meetings, you can specify that Organizer books a full-day appointment in your Calendar during every day of an event you schedule. Anyone attempting to invite you to a meeting during the time of the event will see that your time is booked.

1. Click the Planner tab.
2. Insert or edit the Planner event.
3. Select Book free time.
4. Click OK.

Note Booking free time only affects the display of your free time during group scheduling. Organizer won’t warn you of a conflict if you insert an appointment during the booked time, nor will the Planner event appear in your Calendar. To specify that Planner events appear in Calendar, choose Section - Show Through. For more information on Section - Show Through, see “Displaying entries from another section in Calendar,” in Chapter 4.

Exploring other things you can do with Planner

Experiment with some of these additional tasks.

Changing key names

To change the key name for an event type, move the pointer to any key name and double-click. The pointer changes to the I-beam. Edit the keyname.

Quickly changing an event duration

To quickly change the duration of the event, place the mouse pointer on the event's border. When the mouse pointer turns to a double-sided arrow, press and hold the mouse button and drag the arrow to the left or right to increase or decrease the duration of the event.

Displaying overlapping events

To display an event that overlaps with another, select an event you want to create in the Planner key, place the pen over the portion of the event with which the two events overlap, and drag the pen tip to the date on which you want the new event to end. Organizer indicates the overlapping portion of the event with a cross-hatching pattern in the color strip.

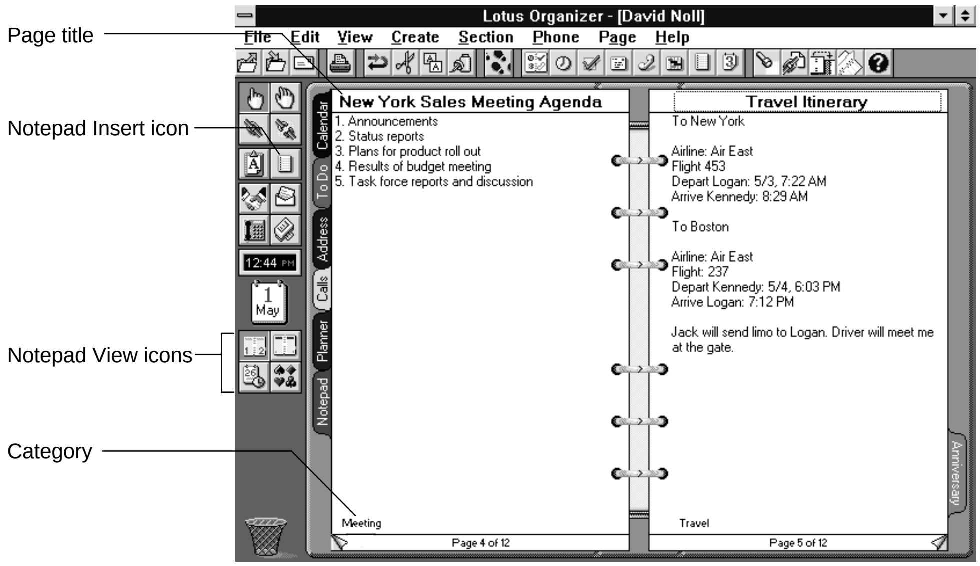
For more detailed information

For detailed information on Planner, choose Help - Contents, click How Do I?, and select Appointments, Schedules, and Anniversaries — by clicking the green text.

Keeping notes in the Notepad

The Notepad section acts like a paper notepad. However, this electronic notepad helps you quickly organize notes, lists, reminders, memos or anything you'd usually write on a piece of paper. You can display diagrams, organizational charts, maps, or graphical logos on Notepad pages. You can also bring in financial information from sources, such as spreadsheets, e-mail messages, and sales charts.

The following illustration shows some of the basic Notepad components:



- Page title — Double-click here or on the page itself to edit the page.
- Notepad Insert icon — Double-click to create a Notepad entry. You can also double-click any empty space on the Notepad Contents page or press **INS**.
- Notepad View icons — Click to display a Notepad by page number, alphabetized by page title, date the entry was created, or category.
- Category — A label you can use to view and find entries. When you enter a category for an entry it appears here. To see Notepad entries organized by category, click the Category view icon.

Creating a Notepad page

To create a Notepad entry, enter information, such as meeting notes, a daily journal entry, or travel itinerary, on a Notepad page.

1. Click the Notepad tab.

   Organizer displays the Notepad Contents page.
2. Double-click any empty space on the Notepad Contents page.
3. Enter a title for the Notepad page.

   For example, type Meeting Notes for a meeting.
4. Under Notes, enter the information you want to display on your Notepad page.

For example, you can add specific information that occurred during a meeting.

5. Select the following options, if appropriate:

Option	*Result*
Categories	Categorizes the Notepad page. For example, you can enter "Travel" as a category for a travel itinerary. When you add a category to any Organizer section, it becomes available to use as a category in other Organizer sections.
Page number	Determines the order in which this page appears in the Notepad section. To manually order Notepad pages, enter the page number you want by entering the number in the Manual text box, under Page number. For example, if Notepad has five pages and you type *3*, Organizer puts this page between pages 2 and 4. To automatically place pages in Notepad in the order you create them, select Automatic.

6. Click Add.
7. Add more Notepad pages by repeating steps 3 - 6.
8. Click Close when you finish adding pages.

Tip To enter text directly on an already created Notepad page, select the page and click where you want to edit the text.

Displaying a picture in Notepad

You can include pictures on Notepad pages, for example, graphics, charts, or company logos. Notepad can display two formats of graphical data: bitmaps (files with the extension .BMP), and Windows Metafiles® (files with the extension .WMF).

Note When you include a picture, you can't enter text on the page; however, you can enter text in the Notes text box of the Create Page and Edit Page dialog boxes.

1. Click the Notepad tab and insert or edit a Notepad page.
2. Click File.
3. Select a drive and path name from the Directories and Drive drop-down boxes.
4. Click the List files of type drop-down box to select a metafile or bitmap file type and select the file name from the File name drop-down box.
5. Click OK.
6. Click Page.

7. Under Picture sizing, select one of the following options:

Option	*Result*
Original size	Maintains the original size of the file's picture (default).
Fit to page	Enlarges the page to fit within the Notepad margins.
Fill entire page	Enlarges the picture to fit the entire length and width of the Notepad page.
Percentage	Displays the picture reduced or enlarged by the size you specify in the text box. (100% is the default.)

8. Click OK.
9. Click OK.

Tip To create a fold-out page, create or edit a Notepad page, click Page and then under Style, select Folded. The Fold Out icon appears in the top right corner of the page. Click it to fold out or fold in the page. This is particularly useful for displaying large graphics.

Tip To align a picture on the page, double-click a Notepad entry and click Align. Under Horizontal, click Left to align the picture to the left side of the page, Center to center it, and Right to align it to the right. Under Vertical, select Top to place the picture at the top of the page, Center to place it in the center, and Bottom to place it on the bottom.

Exploring other things you can do with Notepad

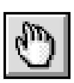
Experiment with these additional tasks.

Going to an existing page

To go to an existing Notepad page, click the Notepad tab. Organizer displays the Contents page. This is much like a Table of Contents in a book. Double-click the title of the page you want to go to. Alternatively, you can page through Notepad pages by clicking the Page turner symbols.

Reordering pages

To quickly reorder Notepad pages, click the Notepad tab to display the Notepad Contents. Select the entry you want to move, and drag and drop it above the entry where you want it to appear. For example, if you titled pages Meeting Notes, Agenda, and Shopping List, and you drag and drop Shopping List to Meeting Notes, Shopping List will appear before Meeting Notes.



To move an entry to a contents page that is not visible in the current view, click the Pick up icon**,** select the entry you want to move, turn to the Contents page where you want to insert it, and drop it in the new location.

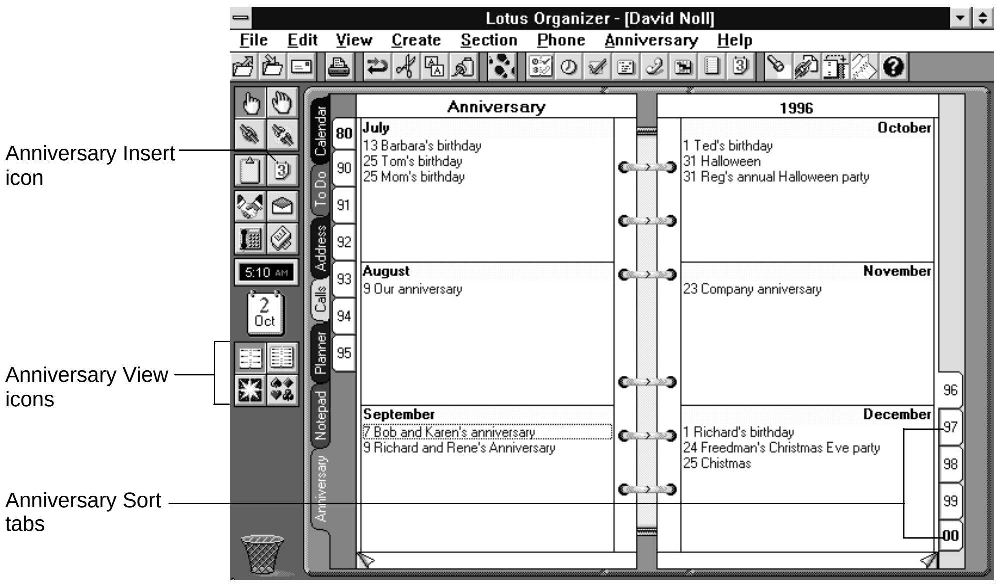
For more detailed information

For detailed information on Notepad, choose Help - Contents, click How Do I?, and select To Do Lists and Notepad Pages — by clicking the green text.

Keeping track of anniversaries

You can use the Anniversary section to create a list of all the important dates you need to remember every year. An Anniversary entry can be a birthday, wedding, or a special day for which you want to be reminded. You can enter as many anniversaries as you like. You can sort and view anniversaries by year, month, category, or zodiac sign, and set an alarm for them.

The following illustration shows some of the basic Anniversary components:



- Anniversary Insert icon — Click to create an Anniversary entry. You can also double-click any empty space on the Anniversary page or press **INS**.
- Anniversary View icons — Click to display Anniversary by month, year, zodiac sign, or category.
- Anniversary Sort tab — Depending on the View icon you select, click to display anniversaries sorted in each view (by a six-month period, year, zodiac sign, or category). For example, if you're viewing your Anniversary entries by Zodiac, click the Pisces zodiac sign on the Sort tab to view March entries.

Creating an Anniversary entry

To create an Anniversary entry, enter a date, such as a birthday or holiday, that takes place on the same date every year.

1. Click the Anniversary tab.
2. Double-click any empty space on the Anniversary page.
3. Under Description, enter a description of the anniversary.

   For example, type My birthday. Organizer records the date and year automatically.
4. Enter a date or specify one from the drop-down box.
5. Click Add.
6. Add more anniversaries by repeating steps 3 - 4.
7. Click Close.

Exploring other things you can do with Anniversary

Experiment with these additional tasks.

Creating repeating anniversaries that occur at irregular intervals

Organizer lets you enter an anniversary, such as a holiday, that is based on historical, religious, or cultural events as a custom date. To set a custom date, double-click any empty space on the Anniversary page and click Repeat. Select Custom in the Repeats drop-down box. Click the Custom dates drop-down box, select a date, click Add, and repeat this procedure until you add all the dates.

Setting an alarm

You can set an alarm to remind you of an anniversary, for example, an alarm that will go off several days ahead of a birthday that reminds you to buy a card. To set an alarm, create or edit an anniversary, and click Alarm. Enter the alarm for an anniversary in the same way you entered an alarm in “Setting an alarm,” earlier in this chapter.

For more detailed information

For detailed information on Anniversary, choose Help - Contents; click How Do I?; and select Appointments, Schedules, and Anniversaries — by clicking the green text.

Chapter 4
Tying It All Together

Now that you've explored some of the features available in each Organizer section, use this chapter to try other features available across all Organizer sections and get a feel for Organizer's power as an integrated, easily-customizable productivity tool. For example, you can

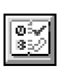
- Display To Do tasks, Calls entries, Planner events, and Anniversary entries with your appointments and meetings.
- Select from two dozen print layouts and print your information from each section.
- Determine how your Organizer sections look and how information appears.
- Customize Organizer by adding or removing sections, and changing section names.
- Maximize the size of your Organizer desktop so you use the entire screen to view and edit information.
- Cross-reference information by linking entries in one section to another.
- Share sections with others in your workgroup.
- Merge entries from two Organizer files.

Displaying entries from another section in Calendar

One of Organizer's most powerful features helps you organize your day from your Calendar. You can use the Show Through feature to display entries you created in other sections into your Calendar.

For example, you may want to see the tasks from your To Do section along with your appointments. This is handy if you want a reminder of which tasks are due on a particular day. In this way, you can more easily see how to manage both your time and your tasks. To see how this works, show some To Do tasks through to Calendar.

Note Before you begin, be sure there are entries in your To Do section.



1. From any Organizer section, choose Section - Show Through or click the Show through icon.

2. Click the Show into drop-down box and select Calendar.
3. Under From, select To Do.
4. Click Preferences.
5. Under Preferences, select whether you want the entries to show above or below your appointments.
6. Under Show, select First line only if you want to show only the first line of the entry.

   If you don't select this option, the entire entry will show through.
7. Click OK.
8. Click OK.

   Entries from the To Do section now display in the Calendar on the dates you selected.

Tip You can also show Calendar entries in the Planner section in the same manner. For more information on showing Calendar entries in the Planner section, choose Help - Contents, click How Do I?, and select Cross-Referencing Information in Organizer and then select Displaying entries in more than one section — by clicking the green text.

Printing Organizer information

You can print information from any Organizer section using a large selection of layouts. For example, you can print Calendar entries in daily, weekly, monthly, or trifold layouts. You can use Organizer's predefined layouts or customize your own.

1. Choose File - Print or click the Printer icon in Toolbox.
2. Click the Section drop-down box to select the section you want to print.
3. Click the Layouts drop-down box to select the layout you want.
4. (Optional) To see a preview of this layout, click Layouts and select a layout from the Layout drop-down box and then click OK to return to the Print dialog box.
5. Click the Paper drop-down box to select the paper type and size you want.

6. Under Range, select one of the following options:

Option	*Result*
All	Prints all information in the selected section.
From	Selects the first entry to print.
To	Selects the last entry to print.
Selected entries	Prints the entries you selected before you chose File - Print.

7. Click OK.

For detailed information on print layouts, refer to Lotus Organizer 2.1 *Print Layout Guide* in your Lotus Organizer box.

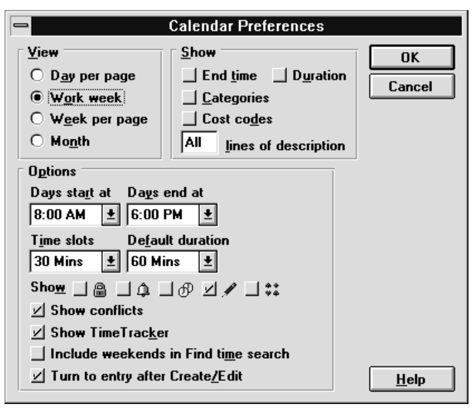
For more detailed information

For detailed information on printing, choose Help - Contents, click How Do I?, and select Printing Your Work — by clicking the green text.

Setting preferences

Organizer preferences let you change settings for each section or for the entire file across all sections. You can design your Organizer notebook so that it looks the way you want it to look and suits the way you do your work. For example, preferences for the Calendar section let you select what view Organizer displays when you first open the section, what information you see on the Calendar page, or certain Calendar options, such as whether to display end times for appointments or the default duration of meetings.

For example, when you choose View - Calendar Preferences you see the following dialog box:



You can also choose File - Organizer preferences to set up Organizer preferences that affect the entire file. For example, you can set up who can access your file if you're using Organizer on a network, how often Organizer saves your file, or options for meeting notices if you schedule group meetings.

Setting section preferences

Preferences for each Organizer section determine how the section looks and how information appears.

1. Click an Organizer Section tab.
2. Choose View - [*section name*] Preferences.

   [*section name*] is replaced with the section you're in. For example, if you're in the Calendar section, you'll see the menu command View - Calendar Preferences.

   For detailed information on preferences for each section, choose Help - Contents, click How Do I?, and select Customizing Organizer — by clicking the green text.

Setting global preferences

You can also set preferences that apply to *all* Organizer sections. For example, you can set your preferences to open a particular file when you start Organizer or customize the SmartIcons.

To set preferences that affect your entire file, choose File - Organizer Preferences and choose a command from the menu.

Command	*Sets up*
Organizer Setup	Preferences that are in effect each time you use Organizer, such as what section opens when you start Organizer or how often Organizer saves your file.
Printer Setup	Default printer settings, such as the name and location of your printer, the paper orientation (portrait or landscape), and paper size.
Meeting Notices	The way Organizer processes meeting notices sent to you, such as automatically processing meeting invitations and entering them in your Calendar.
SmartIcons	Preferences, such as what icons appear in the Organizer window, where they appear, and what size they appear in.
User Access	Access privileges you can assign to your file for other users.
Dialer	The communications settings you can set for your modem to dial phone numbers.

Customizing Organizer

Organizer comes with seven standard sections to help you manage your work: Calendar, To Do, Address, Calls, Planner, Notepad, and Anniversary. You can add more sections and rename sections as you like. For example, you can create one Notepad section for meeting notes and another for travel information, or you can create separate To Do lists, one for work and one for home.

You can also use Organizer sections to build complete books of information that are specific to your work. For example, you can create a corporate manual called "Policy" that's accessible to all employees, or a personal journal that contains your personal goals and strategies. You can create each book as a separate file: one called POLICY.OR2; the other called JOURNAL.OR2.

Tip See the ALMANAC.OR2 file in the org2/orgfiles subdirectory for an example of a customized Organizer notebook.

You can also reorganize sections to adapt to your changing needs. You can add, remove, reorder, or rename sections so you can more quickly find and customize your own information.

Adding a section

You can add many new sections to your Organizer notebook. Other section tabs in Organizer will automatically make room for the tabs you add.

1. Choose Section - Customize.
2. Click Add.
3. Click the Section type drop-down box and select a section type.
4. Enter a name for the section in the Section name text box.

   For example, you can call a new Notepad section "Conference" because you want to collect all the information about a conference you're planning.
5. Click OK to confirm your change.

   Your new section appears in the list of sections under Tab in the Customize dialog box.

You can identify the type of section you want by the symbols before the section name.

Symbol	*Section*
	Calendar
	To Do
	Address
	Calls
	Planner
	Notepad
	Anniversary

6. Click OK.

Removing a section

1. Choose Section - Customize.

2. Under Tabs, select the section you want to remove.

3. Click Remove.

Organizer warns you that the section will be removed, its contents deleted, and asks if you want to continue.

4. Click Yes to remove the section; click No to return to the Customize dialog box without removing the section.

5. Click OK.

Changing a section name

1. Choose Section - Customize.

2. Under Tabs, select the section you want to rename.

For example, to personalize your Notepad section as the section to store your meeting notes, rename it Meeting Notes.

3. Click Rename.

4. For New name, enter a new name for the current section.

5. Click OK to confirm your change.

6. Click OK.

Changing notebook characteristics

1. Choose Section - Customize.

2. Under Binder, click the Color drop-down box to select a binder color.

3. Under Binder, click the Texture drop-down box to select a texture for the binder.

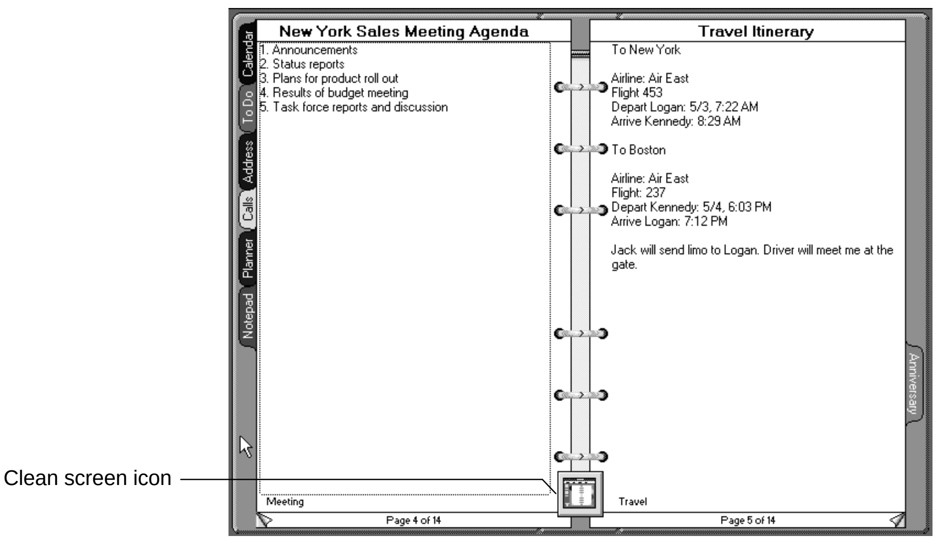
4. Under Tab preferences, select Size to name to make the tab only as large as the section name.
5. Click OK to confirm your changes.

For more detailed information

For detailed information on customizing Organizer, choose Help - Contents, click How Do I?, and select Customizing Organizer — by clicking the green text.

Maximizing the size of your Organizer notebook

You can maximize your Organizer desktop to see more of each Organizer section by hiding the Organizer window controls from the screen. When you choose to do this, Organizer temporarily removes the following window controls: the title bar, the main menu, SmartIcons, and vertical and horizontal scroll arrows. This lets you view the Organizer notebook as a maximized screen in which to see and edit your work more closely.



To maximize and then restore your Organizer notebook to its original size

1. Choose View - Show Clean Screen or press **F11**.

   Organizer is maximized. The title bar, menus, SmartIcons, and Toolbox icons disappear. The Clean screen icon appears at the bottom of the screen.

You can continue to work in any Organizer section using both the mouse and keyboard. For example, you can access the File commands on the menu by pressing **ALT+F**, the Edit commands by pressing **ALT+E**, and so on.

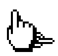
2. To redisplay the Organizer window controls, click the Clean screen icon or press **F11**.

Cross-referencing entries

Organizer lets you cross-reference or link discrete pieces of information to help you access related material.

You can set up links between the information within your Organizer file and quickly turn to the entries you cross-referenced. You can create links between pieces of information in different Organizer sections or between entries in the same section. For example, you can link an appointment in your Calendar to a person in your Address section to quickly access that person's phone number. You can also link the same appointment to some business information in your Notepad, such as notes you want to take to the appointment.

1. Click the Link icon in Toolbox.
2. Move the mouse pointer to the entry you want to link.



When you move the pointer to this entry, it changes to a hand with a partial link.

3. Click the entry.

When you select this entry, the pointer changes to a hand with a complete link.

4. Point to the entry you want to link your first link to and click.

When you select the entry you want to link to, Organizer places the Link icon next to each entry you clicked.

Note Before you select the entry you want to link to, you can turn pages or click a Section tab to move to another Organizer section. When you do, the mouse pointer changes back to a hand. When you move the mouse pointer to the other entry, it changes to a hand with a complete link.

5. Repeat steps 1 - 4 until you finish linking entries.

Note To see the links you created, click the Link icon next to the entry. Organizer displays a list of the entries that this entry is linked to called a Link menu.

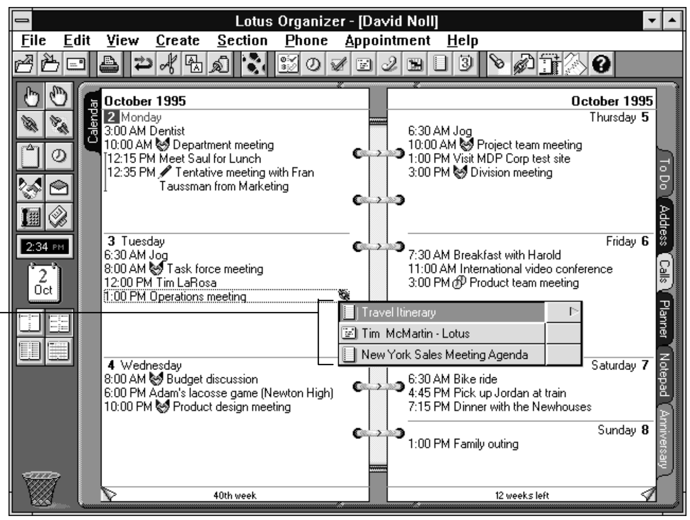
Navigating to linked information

A link displays the information it's linked to in a Link menu. You use Link menus to navigate to linked information.

1. Move the mouse pointer to the Link icon and click.

A list of entries to which this entry is linked appears. This list is the Link menu.

Link menu



The link's description is preceded by an icon that indicates the type of section for the linked entry. For example, a link to a Calls entry is preceded by the Calls icon. For a table that shows these symbols and the sections they represent, see "Adding a section," earlier in this chapter.

2. To go to the linked entry, click the appropriate item in the Link menu.

If an arrow appears at the end of a link description, the linked entry contains additional links. For example, you may have linked a scheduled meeting to a To Do task and then linked the task to an

Address entry. Click the arrow to display the additional links and click the Link menu item you want.

Deleting a link

You may want to break or delete a link between entries because the link is no longer relevant. For example, you may have linked a Notepad page containing information on your biggest customer to a contact name in the Address section. If your key contact leaves the company, you'll want to delete the link and create a new link to the new contact now entered into your Address section.

1. Click the Broken link icon in Toolbox.
2. Go to the entry you want to unlink.

   The pointer changes to a hand with a broken link.
3. Click the Link icon to the right of the entry.

   The Link menu appears.
4. Click the link you want to break.

   Note Organizer deletes only the links you select, not the information associated with the links.

For more detailed information

For detailed information on linking, choose Help - Contents, click How Do I?, and select Cross-Referencing Information in Organizer — by clicking the green text.

Sharing sections from other Organizer files

If you have access rights to another user's file, you can include sections from that user's file in your Organizer file so that each time you open your own file, it includes the other user's section. For example, if you're an assistant, you may want to include your manager's To Do section along with your own Calendar section.

1. Verify that the person whose section you want to include has given you Reader, Assistant, or Trustee access to his or her file.

   For information on how to set access levels, see "Assigning an assistant to schedule and respond to your group meetings," in Chapter 3.
2. Choose Section - Include.
3. For From, enter the name of the Organizer file from which you want to include a section. If you want to include a section from a file used for group scheduling, you must open the file by the person's user name.

4. (Optional) Click Browse to select a file or use the Names command button to select a person whose file is set up for group scheduling and click OK.
5. For Section, select the section you want to include.

   For example, you could include your manager's Calendar section in your file.
6. For Tab name, enter the name you want to appear on the tab for the included section.

   Note This only changes the tab name in your file. It doesn't change the tab name in the source file.
7. Click OK.

Note You can make changes to an included section if the owner of the Organizer file has given you Assistant, Trustee, or Owner access privileges. If the information in an included section changes, you'll see the change in the included section of your Organizer file the next time you turn to that page.

Merging files

If you take your Organizer file with you when you leave the office, for use on a home computer or on a notebook computer (laptop) when you're traveling, then you'll want to update the network file by using Merge when you return to the office. With Organizer, you can make changes to your file at home or on the road and then merge those changes back into the copy of your Organizer file at the office.

The merge process merges changes from the local file into the LAN file. If you make changes while you're away from the office and your assistant also makes changes to the file maintained on the network, you need to merge the files so that the LAN file now contains all changes.

Note If you want to make changes to your Organizer file on a notebook computer (laptop) when you're away from the office, you must choose File - Save As to copy your network file to the hard disk of your notebook computer (laptop) before you leave the office. To make this notebook (laptop) file the same as the merged LAN file, when you return to the office, after you've done the Merge, choose File - Save as again and save the file on your hard disk.

1. Choose File - Open.
2. Select the file into which you want to merge the changes and click OK.

   Group-scheduling users must open the group-scheduling file on the LAN, first. Then, merge the local copy of the Organizer file that was changed when you were away from the office into the group-scheduling file.
3. Choose File - Merge.
4. Select the changed file to merge into the open file.
5. Under Automatically accept, select whether to accept edits, additions, and / or deletions from the changed file automatically.
6. Click OK.

   If you aren't automatically accepting edits, additions, and deletions, Organizer displays a dialog box that lists, under separate tabs, each edit, addition, and / or deletion. You can look through these edits, additions, and / or deletions, select the ones you want to merge into the open file, or de-select the edits, additions, and / or deletions you don't want to merge into the open file.
7. Click OK when you finish selecting changes.
8. Click OK.

For more detailed information

For detailed information on merging files, choose Help - Contents, click How Do I?, and select Using Organizer on a Laptop — by clicking the green text.

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