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Using Help

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Overview of Lotus Organizer Administration 2.1 for single-server scheduling



Single-server scheduling uses a common message file that contains a separate table of meeting notices for each user. With single-server scheduling, all users share this message file and there is no scheduling agent. Typically, single-server scheduling is for small workgroups who share Organizer files on one file server without Notes or cc:Mail.

Lotus Organizer Administration 2.1 is a Microsoft Windows application for managing Organizer group-scheduling files. Lotus Organizer Administration 2.1 lets you do the following:

- Display entries for Organizer users, rooms, and resources.
- Create, configure, and maintain entries for users, rooms, and resources.
- Select a single entry or multiple entries.
- Select entries that match specific criteria.
- Edit and delete entries for users, rooms, and resources.
- Reset a password for a user's Organizer file.
- Display errors and informational messages on the screen, in a log file, or both.
- Assign access rights to Organizer files.
- Compact Organizer files.

The Lotus Organizer Administration window



When you successfully start Lotus Organizer Administration 2.1, the Lotus Organizer Administration window appears. Entries Lotus Organizer Administration receives from the ORGNAMES.BOX file, along with any Organizer scheduling information currently associated with the entries, appear in this window. The file's directory is pointed to by the MessageBox entry in the [Scheduling] section of the ORG2.INI file.

The following sections include details about areas of the Lotus Organizer Administration window.





Columns for Organizer entries

The Lotus Organizer Administration window arranges scheduling information for Organizer entries in columns.

Column	Displays
Name	Name of the entry (user, room, or resource)
File server	The server name and volume name associated with the Organizer file
Directory	The directory within which the entry's Organizer file is stored
File name	The entry's Organizer file name

Icons for Organizer entries

Each Organizer entry type has an icon associated with it (except any Organizer users who have not created their Organizer files). The following table summarizes these icons:

Icon	Description
	A user with an Organizer file for group scheduling
	An Organizer file set up as a room
	An Organizer file set up as a resource
	A volume alias (Lotus Organizer Scheduling for Macintosh Release 1.1 entries only)

Status bar



The status bar consists of two areas and a button that display information about the Lotus Organizer Administration window.

Program status text area

Displays prompts that help you use menus and commands.

Access area

The access area in the bottom right corner of the status bar displays one of the following icons:

Icon	Description
	Indicates read-write access to the ORGNAMES.BOX file.
	Indicates read-only access to the ORGNAMES.BOX file.

Address Book button

Lists Single Server Address Book.

See also

[Resizing columns](#)

Resizing columns



When a column is too narrow to display an entire field, Lotus Organizer Administration displays only the part of the field that fits in the column where it is displayed. To increase your column width for more data, you can widen the column. All columns but the icon column are resizable.

1. Move the mouse pointer to the right border of the column name.
The mouse pointer changes to a black two-headed horizontal arrow.
2. Drag the pointer to the right until the column is the width you want.

Overview of naming Organizer files



When you create an Organizer entry for a user, room, or resource, Lotus Organizer Administration provides the following methods for naming the Organizer (.OR2) file:

- First initial and last name
- First name and last name
- Specific name you enter

Organizer file-naming algorithm

Lotus Organizer Administration uses an algorithm to guarantee unique Organizer file names in each ORGNAMES.BOX file. By default, Lotus Organizer Administration uses first initial and last name when it first creates the .OR2 file name. For example, Daniel Rosa's Organizer file would be DRosa.OR2 by default.

If you later add an Organizer user whose first initial and last name already exist in the ORGNAMES.BOX file, Lotus Organizer Administration appends *n* to the existing file name, where *n* is a number starting with 1. (*n* increases in increments of 1.) For example, after Daniel Rosa's file (DRosa.OR2) is created, Dorothy Rosa's .OR2 file name would be DRosa1.OR2, David Rosa's .OR2 file name would be DRosa2.OR2, and so on.

When generating unique file names, Lotus Organizer Administration may convert certain characters that are not valid MS-DOS file name characters (for the current code page in use) to similar characters or to the _ (underscore). If you don't like the name Lotus Organizer Administration generates, use the Specific option in the Edit Selected dialog box to rename the .OR2 file. (You get there by choosing Edit - Edit Selected.) Remember, .OR2 file names must be unique in the specified directory.

When you select first name and last name, Lotus Organizer Administration uses as many characters in the first name as it can, followed by as many characters in the last name until it reaches the DOS eight-character limit for file names. With this naming scheme, Judy Hersh's .OR2 file name would be JudyHers.OR2, Timothy Wood's .OR2 file name would be TimothyW.OR2, and Caroline Rosa's .OR2 file name would be Caroline.OR2.

If the .OR2 file name can't fit within the DOS, eight-character file name limit, Lotus Organizer Administration truncates characters from the name when it creates the .OR2 file name. For example, Mike Greenwood's .OR2 file name would be MGreenwo.OR2. If necessary, the .OR2 name is further truncated to guarantee unique .OR2 file names. For example, Marcia Greenwood's .OR2 file name would be MGreenw1.OR2, Martin Greenwood's .OR2 file name would be MGreenw2.OR2, and so on.

When you enter a specific name for the .OR2 file, you are restricted only by DOS file-naming conventions and the current .OR2 names.

Setting preferences



You can determine how Lotus Organizer Administration reports errors and informational messages: on the screen, in a log file, or both.

1. Choose File - Preferences.
2. To display errors and informational messages on the screen, under Interactive error message boxes, click the Detail drop-down box and select the type of messages you want to display: Normal (errors and warnings) or Verbose (errors, warnings, and status).
3. To display errors and informational messages in a log file, under Log file, click the Detail drop-down box and select the type of messages you want to log: Normal (errors and warnings) or Verbose (errors, warnings, and status).
4. If you select Log file, enter a new file name in the text box.
Lotus Organizer Administration creates the default log file, named ORGADMIN.LOG, and places it in the directory from which you're running Lotus Organizer Administration. You can use a text editor to open the log file and view it.
5. Click OK.

Lotus Organizer Administration creates initialization entries for the choices you make in the Preferences dialog box in the [Org Admin] section of the ORG2.INI file. See "Maintaining the ORG2.INI file," in Chapter 5 of *Lotus Organizer 2.1 Administrator's Guide*, for more information.

Starting Lotus Organizer Administration



You must complete a file server installation and then complete a node installation on the same system before starting Lotus Organizer Administration.

1. Start Windows and display the Program Manager window.
2. If necessary, open the group window that contains the Lotus Organizer Administration 2.1 program icon.
3. Double-click the Lotus Organizer Administration 2.1 program icon.



Ending Lotus Organizer Administration



Choose File - Exit or press ALT+F4.

Selecting a single entry



To work with an entry, you must select it. When you select an entry, it is highlighted. You can select a single entry and then use Lotus Organizer Administration to act on the entry you select.

Move the mouse pointer to the entry you want to select, and click the left mouse button.

You can also use the following keys to select an entry:

Press	To select
↑ or ↓	An entry above or below the current selection
END	The last entry in the list of entries
HOME	The first entry in the list of entries
PG UP	The entry at the top of the current window
PG DN	The entry at the bottom of the current window

Selecting multiple entries



Selecting multiple entries is useful when you want to perform one task on multiple entries at a time. You can select entries that appear in sequence or out of sequence.

To select multiple entries in sequence

1. Click the first entry you want to select.
2. Drag to the last entry you want to select.

You can also click the first entry and press and hold SHIFT while you click the last entry you want to select.

To select multiple entries out of sequence, press and hold CTRL while you click each entry.

Deselecting a single entry or multiple entries



When you deselect an entry the entry is no longer highlighted.

To deselect a single entry, select another entry.

To deselect multiple entries, press and hold CTRL while you select each entry.

To deselect all selected entries, choose Edit - Deselect All.

Selecting entries that match specific criteria



Selecting entries that match criteria you specify is useful when you want to perform one task on multiple entries at a time. For example, you may want to select several Organizer users on a file server and change the name of their directory.

1. Choose Edit - Select Specific.
2. Select the type of entry (Organizer user, room, or resource).
3. Enter the desired information in the Select Specific dialog box.

For example, you could select all entries that have a specific directory by entering its name in the Directory text box.

4. Click OK.

Lotus Organizer Administration deselects all current selections and selects all entries that meet the desired criteria.

Options for the Select Specific dialog box

Option	Result
Type of entry to select	Lets you limit the search to a specific type of Organizer entry.
Server\volume	Restricts the search to entries whose Organizer files are on the specified server and volume.
Directory	Restricts the search to entries whose Organizer files have the specified directory.

Note Lotus Organizer Administration displays "Server\volume" for Novell NetWare and "Server\resource" for LAN Manager and MS-Net compatible networks in the Organizer file location list box.

Going to a specific entry



1. Choose Edit - Go To.
2. Enter the first few letters of the entry you want to go to.
For example, if you type lind and click OK, Lotus Organizer Administration goes to the first Organizer entry whose name begins with these four letters).
3. Click OK.

You can also go to an entry by entering the sequence of characters quickly in the Lotus Organizer Administration window.

Creating an entry for an Organizer user



1. Choose Create - Organizer User.
2. Enter the name of the user in the User name text box.
For example, Erin Crow.
3. Enter the data for your Organizer network in the Server\volume text box and the Directory text box for this user.
4. Select a method for naming the user's Organizer file or enter a specific Organizer file name.
For example, ERINC.OR2.
Lotus Organizer Administration uses the default (first initial and last name) when naming Organizer files.
5. Select Create scheduling file if it is not selected.
If you are upgrading an Organizer Release 1.1 or Release 2 PIM user to single-server scheduling, deselect the Create scheduling file option to guarantee that Lotus Organizer Administration reserves a unique file name for the user. When the user tries to open Organizer PIM files, Organizer will display a dialog box asking whether or not to convert the file to an .OR2 file.
6. Click OK.

See also

[Overview of naming Organizer files](#)

[Assigning access rights to an Organizer file](#)

Creating an entry for an Organizer room



Organizer 2.x has different entry types for rooms and resources. Rooms in Organizer 2.x are meeting or conference rooms, and resources are items like company vehicles, computers, and audio visual equipment. In Organizer 1.1, there was only one entry type for rooms and resources.

1. Choose Create - Room.
2. Enter the name of the new room in the User name text box.
When naming rooms, enter the conference room number, followed by its capacity in parentheses: for example, Conf. Rm. 109 (12).
3. Enter the data for your Organizer network in the Server\volume text box and the Directory text box for this room.
4. Select a method for naming the room's Organizer file or enter a specific Organizer file name.
The default .OR2 file name for Conf. Rm. 109 (12) is C(12).or2.
5. Select Create scheduling file if it is not selected.

If you are upgrading an Organizer Release 1.1 resource for a conference room to an Organizer Release 2.x room, deselect the Create scheduling file option to guarantee that Lotus Organizer Administration reserves a unique file name for this room. Then you need to start the Organizer client and convert the .ORG file for this room to an .OR2 file.

6. Click OK.

After creating a room entry, you may want to edit the entry's access rights to give the room administrator special access to the Organizer file.

See also

[Overview of naming Organizer files](#)

[Assigning access rights to an Organizer file](#)

Creating an entry for an Organizer resource



Organizer 2.x has different entry types for rooms and resources. Rooms in Organizer 2.x are meeting or conference rooms, and resources are items owned by the company, for example, cars, computers, and audio visual equipment. In Organizer 1.1, there was only one entry type for rooms and resources.

1. Choose Create - Resource.
2. Enter the name of the new resource in the User name text box.
For example, Overhead Projector.
Users, rooms, and resources are grouped together and sorted separately in the ORGNAMES.BOX file.
3. Enter the data for your Organizer network in the Server/volume text box and the Directory text box for this resource.
4. Select a method for naming the resource's Organizer file or enter a specific Organizer file name.
The default .OR2 file name for Overhead Projector is OProject.or2.
5. Select Create scheduling file, if it is not selected.
If you are upgrading an Organizer Release 1.1 resource to an Organizer Release 2.x resource, deselect Create scheduling file to guarantee that Lotus Organizer Administration reserves a unique file name for this room. Then you need to start the Organizer client and convert the .ORG file for this room to an .OR2 file.
6. Click OK.

After creating a resource entry, you may want to edit the entry's access rights to give the resource administrator special access to the Organizer file.

See also

[Overview of naming Organizer files](#)

[Assigning access rights to an Organizer file](#)

Editing a single entry



Before you edit an entry, you must select it.

1. Double-click the entry you want to edit.
You can also edit an entry by selecting it and pressing ENTER.
2. Make necessary changes to the Organizer file location and Organizer file name in the appropriate text boxes.
When you edit an entry, Lotus Organizer Administration uses the Keep previous name option, which is the default, for the Organizer file name.
3. Click OK.

See also

[Overview of naming Organizer files](#)

Editing multiple entries



Lotus Organizer Administration lets you edit multiple entries at one time. Editing multiple entries is useful for tasks that involve a large number of entries. For example, you might want to move only 25 out of 50 users on a directory named o:\lotus\org2\orgfiles to t:\lotus\org2\orgfiles. The procedure below demonstrates how to edit the directory name for multiple Organizer user entries.

1. Choose Edit - Select Specific.
2. In the Select Specific dialog box, select the entries you want to edit.
3. Click OK.
4. (Optional) In the Lotus Organizer Administration window, deselect those entries that you don't want to change.
5. Choose Edit - Edit Selected.

Lotus Organizer Administration displays the number of selected Organizer entries, the entry type (if all the entries are the same), and the scheduling information that the entries have in common (server and volume, and directory).

6. Make necessary changes to the directory name.
7. Click OK.

See also

[Selecting entries that match specific criteria](#)

Clearing and deleting an entry



Clearing Organizer information from an entry

When you clear an Organizer entry, Lotus Organizer Administration removes the entry's Organizer scheduling information from the ORGNAMES.BOX file. Clearing an entry does, however, physically retain it. You can clear multiple entries.

1. Select the entry you want to clear.
2. Choose Edit - Clear.
3. (Optional) The Delete Organizer file option is available only when at least one selected entry has an Organizer file associated with it. If you select this option, the Organizer file for this user is erased from the file server.
4. Click OK.

Deleting an entry in the ORGNAMES.BOX file

When you delete an Organizer entry, Lotus Organizer Administration removes the entry from the ORGNAMES.BOX file and you can't retrieve it. You can delete multiple entries.

1. Select the entry you want to delete.
2. Choose Edit - Clear.
3. Select Delete Entry.
4. (Optional) The Delete Organizer file option is available only when at least one selected entry has an Organizer file associated with it. If you select this option, the Organizer file for this user is erased from the file server.
5. Click OK.
6. Click Yes.

Compacting Organizer files



You should compact Organizer files periodically to reduce their file size. Depending on your users and the size of their .OR2 files, you can choose to compact .OR2 files on a weekly or monthly basis. You can compact files while you are using Lotus Organizer Administration 2.1, or, in Batch mode. The following procedures describe both methods for compacting files.

Using Lotus Organizer Compact 2.1

1. From the Lotus Organizer Administration 2.1 window, select the entries whose Organizer files you want to compact.
2. Choose Utilities - Compact.
3. To save the original .OR2 files that Lotus Organizer Administration 2.1 will rename with the extension .OLD, make sure Delete .OLD files is not selected. To delete .OLD files after compacting for the files is completed, select Delete .OLD files.
4. To compact the selected entries, make sure Don't compact now, but create off-line command (.OAC) file is not selected.
5. Click OK.

As Lotus Organizer Administration 2.1 rebuilds the .OR2 file for each entry, it displays a progress indicator with the compact status for each file.

Using Lotus Organizer Compact 2.1 in Batch mode

Lotus Organizer Administration 2.1 lets you compact Organizer files in Batch mode. You must first create the Organizer command (.OAC) file before you can run it in Batch mode.

1. From the Lotus Organizer Administration 2.1 window, select the entries whose Organizer files you want to compact.
2. Choose Utilities - Compact.
3. To save the original .OR2 files that Lotus Organizer Administration 2.1 will rename with the extension .OLD, make sure Delete .OLD files is not selected. To delete .OLD files after compacting for the files is completed, select Delete .OLD files.
4. To compact the selected entries in Batch mode, select Don't compact now, but create off-line command (.OAC) file.

By default, Lotus Organizer Administration 2.1 creates the file named COMPACT.OAC and places it in the Organizer \ADMIN directory. You can enter another name for the file in the text box.
5. Click OK.

After you create the .OAC file, you can run it from Program Manager.

1. From Program Manager, create a copy of the Lotus Organizer Administration 2.1 program icon: press and hold CTRL while you drag this program icon from its current location to another location in the Lotus Applications group window.
2. Select the copied Lotus Organizer Administration 2.1 program icon and choose File - Properties.
3. Type Batch Compact for the Description.
4. Edit the path to Lotus Organizer Administration 2.1 in the Command Line field by typing a space and the name of the Lotus Organizer Compact 2.1 command file (for example, C:\LOTUS\ORG2\ADMIN\ORGADMIN.EXE COMPACT.OAC).
5. Click OK.
6. Double-click the Batch Compact program icon to compact the specified Lotus Organizer Compact 2.1 command file.

Lotus Organizer Administration 2.1 compacts the entries according to the options you selected in the Lotus Organizer Compact 2.1 dialog box.

See also

[Lotus Organizer Compact 2.1 command file](#)

Lotus Organizer Compact 2.1 command file



The Lotus Organizer Compact 2.1 command file is a text file. It may contain the following sections and entries based on login information and options you selected in the Lotus Organizer Compact 2.1 dialog box. The sections and entries in the Lotus Organizer Compact 2.1 command file are included below with a brief description of each one.

[Session] section

Commands=1

The number and sequence of commands to execute. Commands must remain set to 1 for Lotus Organizer Administration 2.1. Each command number has a section associated with it. For an example, see the [Command1] section below.

[Command1] section

AddressBook=c:\lotus\org2\msgbox\orgnames.box

The Address Book that contains names of Organizer users whose Organizer files Lotus Organizer Administration 2.1 will rebuild. For single-server scheduling, the Address Book is the ORGNAMES.BOX file.

SelectionList=[Names]

The name of the section in the command file that lists the names of the users whose Organizer files Lotus Organizer Administration 2.1 will compact.

Command=0

The number for a command you want Lotus Organizer Administration 2.1 to execute. Command must remain set to 0 for Lotus Organizer Administration 2.1.

DeleteOldFiles=0

Tells Lotus Organizer Administration 2.1 to delete or not to delete all .OLD files after compacting is complete: 0=do not delete all .OLD files; 1=delete all .OLD files.

[Names] section

Individual names of the Organizer users whose Organizer files Lotus Organizer Administration 2.1 will compact. You insert the list of names by selecting their entries in the Lotus Organizer Administration 2.1 window or by entering them in this section yourself with a text editor.

Using Help

Lotus Organizer Administration provides context-sensitive Help, namely Help based on the task you're doing. To get help on the dialog box that is displayed, click Help or press F1. Help will appear and your dialog box will also remain open.

See also

[About the Lotus Organizer Administration Help menu](#)

[About the Help buttons](#)

[About the Help icons](#)

[About the Help menu](#)

[About cross-references](#)

About the Lotus Organizer Administration Help menu



When you are working in Lotus Organizer Administration, you can choose Help to display menu items that let you work with Help.

Contents

Displays the Help Contents window, a list of Help main topics.

Search

Displays a list of Help keywords.

Using Help

Displays information on how to use Lotus Organizer Administration Help.

About Lotus Organizer Administration

Displays Lotus Organizer Administration release and copyright information.

About the Help buttons



When the Help window is active, the following buttons appear at the top of the Help window to display related Help topics.

Contents

Displays the main Help Contents window.

Search

Lists all the Help keywords in Lotus Organizer Administration. Enter a keyword in the text box, or select a keyword or phrase in the list box. Then, click Show Topics. Lotus Organizer Administration displays Help topics that relate to the keyword or phrase. To display a topic, select the topic in the list box and click Go To.

Back

Displays the last Help topic you viewed. You can move back through each topic, one at a time. When you're at the first topic, the button is dimmed.

History

Displays a list of the previous Help topics you viewed. You can select a topic in the list to display that topic.

About the Help icons



Lotus Organizer Administration Help provides icons at the top of the Help window that help you better navigate Help and quickly get the information you need.

Icon	Function
	Displays a list of topics related to the current topic. You can display a topic in the list by selecting it, or you can return to the Help Contents window. You can also display the Search window.
	Prints the current Help topic.



About the Windows Help menu



When you are working in Help, the Windows Help menu appears at the top of the main window. For complete information on the Help menu, choose Help - How to Use Help from the Windows Help menu.

File

Opens Help files, prints Help topics, sets printer options, and closes Help.

Edit

Copies Help text to the Clipboard and adds annotations to Help text.

Bookmark

Places bookmarks in and removes bookmarks from Help topics. You use a bookmark to mark a specific Help reference.

Help

Switches control from Lotus Organizer Administration Help to Windows Help and displays information about and options for Windows Help. To return to Lotus Organizer Administration Help, click History and then select a Lotus Organizer Administration Help topic, or click Contents.

About cross-references



Many Help topics contain cross-references to other related Help topics. The cross-references display in green (gray on a monochrome system) with an underline. If the cross-reference leads directly to another Help topic, the underline is a solid line. If the cross-reference leads to a list of related topics from which you must choose, the underline is dotted.

To display another Help topic using a cross-reference, click the cross-reference with the left mouse button. If you use the keyboard, you can press TAB to move to the cross-reference and then press ENTER.

Resetting a password for a user's Organizer file



If a user forgets the password to his or her Organizer file, Lotus Organizer Administration lets the administrator reset the password to the file.

1. From the Lotus Organizer Administration window, select the user entry whose password you want to reset.
2. Choose Utilities - User Access.
3. Click Password.
4. Enter a new password.
5. Click OK.
6. Confirm the password by entering it again.
7. Click OK to confirm the password.
8. Click OK.
9. Inform the user of the new password.

Organizer only checks passwords when there is no network login to validate the user and permit access to a user's named scheduling file. When users create a password for a file, they must type that password to access the file when they are disconnected from the LAN.

Also, when disconnected from the LAN, any other user to whom they granted access rights must also enter the password to open the file. Refer users to the Organizer client Help file for information on protecting their work with a password.

Note If users take an .OR2 file off the LAN, they may want to protect their file with a password because they won't use a network login to provide security. In Organizer 2.1, a dialog box appears as a reminder to users to create and maintain a password on their files.

See also

[Assigning access rights to an Organizer file](#)

Assigning access rights to an Organizer file



You can assign the level of access rights to Organizer files for anyone on your network. When you use Lotus Organizer Administration to create Organizer files for users, the default access right is Free time, which lets other users see only the available time in a user's Calendar section while using group scheduling.

When you use Lotus Organizer Administration to create Organizer files for rooms or resources, the default access level is Reader. You can assign different access levels to rooms and resources.

1. From the Lotus Organizer Administration window, select the user entry whose Organizer file access you want to change.
2. Choose Utilities - User Access.
3. Click Names to see a list of the names of other users to whom you can give access rights.
4. Select a name from the list and click Add.
You can add more than one name.
5. Click Close.
6. Under People or groups, select the name of a person you added.
7. Under Access level, select the level of access rights you want to give this user.
8. Click Update.
9. Repeat steps 6 - 8 for any other user whose name you added.
10. Click OK.
11. Click OK.

Any changes you make to access rights will take effect the next time the Organizer file is opened.

Tip To change the default access for all users, select Default at the top of the People or groups list box, select an access level, and click Update.

Organizer access rights

The following access levels are available:

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.
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 a Calendar for group-scheduling purposes; individual appointment details can't be viewed by others.
None	No access to the file.

