Overview: Address section

When you open your mail file in Organizer, your Personal Name and Address Book (NAMES.NSF) is included in your Organizer as your Address section. The Address section acts like an address book; however, the electronic Address section lets you do more. For example, you can do the following activities:

- Sort your Address records by last name, company, category, or zip code— or use a customized address field you create.
- View your Address records with either all field information, name and address information, name and contact information, or name and telephone number information.
- Create duplicate Address records for multiple contacts within the same company, without having to copy or re-enter the same company-related information repeatedly. For example, you may know two or more contacts who work in the same company. Once you've entered an Address record for one contact, Organizer can automatically duplicate all company-related information for you when you create an Address record for your other contacts at that company.

Address records that you create in Organizer appear as Person documents in your Personal Name and Address Book; Person documents that you create in your Name and Address Book in Notes appear as Address records in Organizer. When you change or delete Address records in Organizer, you'll see the same changes in Notes. Likewise, if you change or delete a Person document in your Name and Address Book in Notes, the changes will appear in your Address section in Organizer.

Field mapping

The following field information you enter in an Organizer Address record displays in Organizer, but won't display in the Notes Person document: Title; Street, City, State, Zip, Country, Ext, Tel 2, and Note from the Business tab; and Tel 2, E-mail, [Unused1], [Unused2], and Notes from the Home tab. The following topics describe what Organizer fields do appear in the Notes person document.

Business tab fields that display in the Person document

Home tab fields that display in the Person document

The following field information you enter in a Notes Person document displays in Notes, but won't display in an Organizer Address record: Middle initial, Full user name, Location, Department, Manager, Cell Phone, Public key, Certified public key, and Short name. The following topics describe what Person document fields do appear in Organizer.

Person document fields that display in the Business tab

Person document fields that display in the Home tab

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS;H_EDITING_AN_ADDRESS_RECORD_STEPS;H_DELETING_AN_ADDRESS_RECORD_STEPS;H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_ADDING_CONTACTS_FROM_THE_SAME_COMPANY_IN_AN_ADDRESS_RECORD_STEPS;H_SORTING_ADDRESSES_STEPS;H_CHANGING_THE_VIEW_OF_ADDRESS_RECORDS_STEPS',0)} See related topics

Organizer Business tab field mappings to Notes Person document fields

Organizer Business tab field	Notes Business column field
Job title	Title
Company	Company
Tel 1	Office phone
Fax	FAX phone
E-mail	Full user name
Assistant	Assistant
Notes	Comment

Deleting an Address record

When you delete an Address record in Organizer, you delete a Person document in your Notes Personal Name and Address Book (NAMES.NSF). See your Notes documentation for more information on Personal Name and Address Books.

1. Select the Address record you want to delete.
2. Drag and drop the Address record to  in Toolbox.

Note To retrieve a deleted Address record, choose Edit - Undo Address Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_AN_ADDRESS_RECORD_DETAILS',1)} See details

{button ,AL(`H_EDITING_AN_ADDRESS_RECORD_STEPS;H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS;',0)} See related topics

Editing an Address record

When you edit an Address record in Organizer, you change the corresponding Person document in your Notes Personal Name and Address Book (NAMES.NSF). See your Notes documentation for more information on Personal Name and Address Books.

1. Double-click the Address record.
2. Edit the Address record.

   See details

Tip Press TAB to move between options in an Edit Address dialog box.

3. Click OK to enter your changes.

{button ,AL(`H_EDITING_AN_ADDRESS_RECORD_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_CHANGING_THE_ADDRESS_ENVELOPE_AND/OR_LABEL_FORMAT_STEPS',0)} See related topics

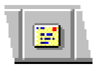
Organizer Home tab field mappings to Notes Person document fields

Organizer Home tab field	Notes Home column field
Street	Street address
City	City
State	State/province
Zip	Zip/postal code
Country	Country
Tel 1	Home phone
Fax	FAX phone
Spouse	Spouse
Children	Children

Creating an Address record

You can create two types of Address records: business or home. When you create an Address record in Organizer, you create a Person document in your Notes Personal Name and Address Book (NAMES.NSF). See your Notes documentation for more information on Personal Name and Address Books.

1. Go to the Address section and double-click the Address page.



2. Select the type of Address record you want by clicking either the Business tab or the Home tab.
3. Enter a name.

   See details
4. (Optional) If you're creating a business address, enter the optional information you want to appear.

   Note If you use Address record information to dial phone calls from Organizer, you must include ( ) (parentheses) around the phone number's area code, for example, (508) 555-1234.
5. (Optional) If you're creating a home address, enter the optional information you want to appear.

   Note If you use Address record information to dial phone calls from Organizer, you must include ( ) (parentheses) around the phone number's area code, for example, (508)555-1234.
6. Click OK.

Tip To create additional Address records, click Add before you click OK. When you finish entering your Address records, click OK.

{button ,AL(`H_INSERTING_AN_ADDRESS_RECORD_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_ADDING_CONTACTS_FROM_THE_SAME_COMPANY_IN_AN_ADDRESS_RECORD_STEPS;H_DIALING_A_NUMBER_QUICKLY_STEPS;H_INSERTING_A_CALL_STEPS;',0)} See related topics

Notes Person document field mappings to Organizer Business tab fields

Notes Business column field	Organizer Business tab field
Mail address	E-mail
Title	Job title
Company	Company
Office phone	Tel 1
FAX phone	Fax
Assistant	Assistant
Comment	Notes

Notes Person document field mappings to Organizer Home tab fields

Notes Home column field	Organizer Home tab field
Street address	Street
City	City
State/province	State
Zip/postal code	Zip
Country	Country
Home phone	Tel 1
FAX phone	Fax
Spouse	Spouse
Children	Children

Overview: Anniversary section

You can use the Anniversary section to keep a list of all the important dates that you need to remember every year. An anniversary can be a birthday, a wedding date, or a special day you want to be reminded of. You can enter as many anniversaries as you like. Using Anniversary, you can do the following activities:

- Specify that an anniversary you enter is automatically carried forward every year.
- Sort and view your anniversaries by year, month, category, or zodiac sign.
- Set an alarm to an anniversary to remind you when the anniversary date is current.
- Designate that your anniversaries automatically appear in your Calendar section so you can see the anniversaries in the context of your daily work.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_INSERTING_AN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;',0)} See related topics

Details: Changing preferences in Anniversary

Changing your Anniversary preferences
You can change any Anniversary preferences so that your anniversary information appears and functions the way you want. You can also change Anniversary preferences as frequently as you want.

Sorting your anniversaries
Let's say, for example, you categorized the information in your Anniversary section into different categories, including a category for "Family" and a category for "Friends." You could group together special anniversaries for family and friends by sorting the anniversaries by category. This would provide you with two separate lists: one for anniversaries for family members and one for anniversaries for friends.

Displaying tabs in Anniversary
Anniversary uses page tabs to group information within the section. The tabs you see depend on the sort order you selected for your anniversaries.

If you sort anniversaries by month or year, Organizer displays year tabs. If you sort by zodiac, Organizer displays the zodiac signs on tabs. If you sort by category, Organizer displays alphabetical tabs.

Click a tab to see entries on that page.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS',1)} Go to procedure

Changing preferences in Anniversary

Anniversary preferences determine how your anniversaries are sorted and what information appears with them. Changing preferences is optional; if you don't change your Anniversary preferences, Organizer uses the default preferences.

1. Go to the Anniversary section and choose View - Anniversary Preferences.

   See details
2. Under "View," select the option for how you want to sort your Anniversary entries.
3. Under "Options," select the appropriate options to customize the appearance and function of the Anniversary section.
4. Under "Show," select the appropriate options you want to appear with your Anniversary entries.
5. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ANNIVERSARY_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Details: Sorting anniversaries

Viewing anniversaries
The sort order determines the way the Anniversary section looks. If you sort by month, a view of 6 months over 2 pages appears. If you sort by year, a view of 12 months over 2 pages appears. If you sort by zodiac sign, tabs with the Zodiac signs appear. If you sort by categories, alphabetical letter tabs appear.

How sorting affects anniversaries
Sorting your anniversaries changes the way the entries are displayed in your Anniversary section. When you sort by month, anniversary entries for six months of the calendar year are displayed. When you sort by year, anniversary entries for the entire year are displayed. When you sort by zodiac sign, anniversary entries for the current zodiac sign are displayed.   When you sort by category, anniversary entries are sorted alphabetically by category, and include # for anniversary entries that you didn't assign a category to or that start with non-alphabetical characters, such as @, or a number like 01890.

Displaying tabs in Anniversary
Anniversary uses page tabs to group information within the section. The tabs you see depend on the sort order you select for your anniversaries.

If you sort anniversaries by month or year, Organizer displays year tabs. If you sort by zodiac sign, Organizer displays the zodiac signs on tabs. If you sort by category, Organizer displays alphabetical tabs.

Click a tab to see entries on that page.

{button ,AL(`H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS',1)} Go to procedure
{button ,AL(`;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS',0)} See related topics

Sorting anniversaries

You can sort anniversaries by month, by year, by zodiac, and by category.

1. Go to Anniversary.
2. Choose View.
3. Choose one of the following commands: By Month, By year, By Zodiac, By Category.

{button ,AL(`H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Customizing the appearance of your Anniversary section

Option	Result
Start headings	Places your anniversaries starting one after another on the same page (default), each anniversary starting on the next page, each starting on the left page, or each starting on the right page.
Show page tabs	Shows (default) or doesn't show the Anniversary page tabs.
Show	Shows or doesn't show (default) a symbol to indicate that you protected, set an alarm for, repeated, or assigned a category to an anniversary. (See Note below.)
Color	Specifies the color of text that Anniversary entries appear in.
Turn to entry after Create/Edit	After you create or edit an anniversary, goes or doesn't go (default) to the page on which the anniversary appears.

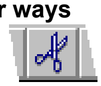
Note Under Options, you can select the following symbols to show information about an anniversary. Except for , these symbols appear with the anniversary, when appropriate.

Symbol	Result
	Indicates that an anniversary is confidential.
	Indicates that an anniversary has an alarm.
	Indicates that an anniversary is a repeating entry.
	Indicates that a category symbol appears with anniversaries. The symbol for the category you have specified appears with each anniversary.

Details: Deleting an anniversary

Keyboard shortcuts
You can also delete an anniversary by selecting it and pressing DEL, or pressing CTRL+X.

Deleting an anniversary in other ways

You can choose Edit - Cut or click  to delete an anniversary.

{button ,AL(`H_DELETING_AN_ANNIVERSARY_STEPS',1)} Go to procedure
{button ,AL(`;H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS',0)} See related topics

Deleting an anniversary

1. Select the anniversary you want to delete.
2. Drag and drop the anniversary to  in Toolbox.

Note To retrieve a deleted anniversary, choose Edit - Undo Anniversary Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_AN_ANNIVERSARY_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Details: Editing an anniversary

Keyboard shortcuts
You can also select the entry and press CTRL+E to edit an anniversary.

Editing an anniversary in other ways
You can also choose Edit - Edit Anniversary to edit it.

Changing the description
You can click anywhere in the box under "Description" in the Edit Anniversary dialog box and enter your changes, or highlight the text and press DEL and enter new text.

Changing the date
Click the "Date" box to select a new date.

Adding information to Anniversary fields you previously left blank
If you want to add information in fields you previously left blank, you must do that in the Edit Anniversary dialog box. Choose Edit - Edit Anniversary. When the Edit Anniversary dialog box appears, make your changes and click OK.

Editing the existing text of your Anniversary record
To edit the existing anniversary text, click the Anniversary record to select it, and click the text you want to edit. When you are done editing, press F2 to enter your changes.

Changing the category
To change the category, click the "Categories" box to select a new category from the list that appears.

Changing Occurs on the same date every year
To change "Occurs on same date every year," select the option.

Changing confidentiality
To change confidentiality, select "Confidential," or press F4.

{button ,AL(`H_EDITING_AN_ANNIVERSARY_STEPS',1)} Go to procedure

{button ,AL(`;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',0)} See related topics

Editing an anniversary

1. Double-click the anniversary.
2. Edit the anniversary.

   See details

Tip Press TAB to move between options in the Edit Anniversary dialog box.

3. Click OK.

{button ,AL(`H_EDITING_AN_ANNIVERSARY_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Details: Creating an anniversary

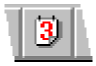
Creating anniversaries in other ways
You can also choose Create - Anniversary or press INS when you are in the Anniversary section to create an anniversary.

Setting up a variable anniversary
To specify an anniversary that doesn't fall on the same day every year (for example, the Easter holiday) deselect "Occurs on same date every year" and click Repeat. In the Repeat dialog box, under "Repeats," click the boxes to select "Monthly (Days)," select "Every twelfth month on the," and then select the day on which the anniversary occurs (for example, 2nd Sunday).

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS',1)} Go to procedure

Creating an anniversary

1. Go to the Anniversary section and double-click the Anniversary page.



2. Under "Description," enter a description of the anniversary.
3. Click the "Date" box to select the date for the anniversary.
4. (Optional) You can select the following options for the anniversary.
5. Click OK.

Tip To create additional anniversaries, click Add before you click OK. When you finish entering all your anniversaries, click OK.

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_DETAILS',1)} See details

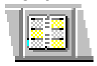
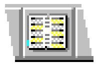
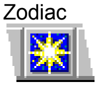
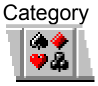
{button ,AL(`H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Selecting anniversary options

Option	Result
Categories	Lets you establish one or more categories for the anniversary.
Occurs on same date every year	Enters (default) or doesn't enter the anniversary on the same date every year after the year in which you inserted it.
Confidential	Makes or doesn't make (default) the anniversary confidential, so others accessing your files can't view it.
	If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Selecting a sort order

The sort icons appear in the Toolbox. You can click an icon instead of choosing the command.

Option	Result
Month 	Sorts anniversaries by month (default).
Year 	Sorts anniversaries by year.
Zodiac 	Sorts anniversaries by zodiac sign.
Category 	Sorts Anniversary page tabs alphabetically (A through Z) and includes # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.

Selecting what you see with anniversaries

Option	Result
Date	Shows (default) or doesn't show the date with each anniversary.
Categories	Shows or doesn't show (default) the names of the categories you assign each anniversary.
Cost code	Shows or doesn't show (default) the cost code you assign each anniversary.
All lines of description	Shows the entire description of each anniversary, or a number of lines that you specify. The default is "All lines of description."

Details: Showing anniversaries in Calendar

Editing an anniversary in Calendar
If you want to edit an anniversary and you're in the Calendar section, double-click the anniversary. The Edit Anniversary dialog box appears. Make your changes and click OK.

Rescheduling an anniversary in Calendar
If you want to change the date of an anniversary and you're in the Calendar section, you can drag and drop the Anniversary entry to a different day on any of the days that appear on your current pages. If you want to reschedule the anniversary to a day on another page, click  in Toolbox, select the Anniversary entry, go to the day you want, and click on that space.

Showing entries while displaying time slots in Day per Page view
If you're using the Day per Page view with time slots, the entries you show through in Calendar don't scroll out of view as you scroll through the day's appointments; that is, the show-through entries stay either above or below the time slots.

Organizer blocks out an area at the top or bottom of your appointments for entries you who through in Calendar. You can expand or shrink this block by dragging the solid box in the bottom-right corner. The new size of this area affects all pages in the Day per Page view.

You can also drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

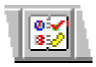
- New size to use the size you dragged for all pages.
- Temporary size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16, the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

{button ,AL(`H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS',1)} Go to procedure

Showing anniversaries in Calendar

By default, Organizer shows entries from To Do, Calls, Planner, and Anniversary sections on the appropriate day in Calendar. Showing entries from other sections can help you see your upcoming commitments in the context of your daily work, for example, you can see any anniversaries you entered along with your appointments. You can change the way your anniversaries appear in Calendar, and, if you don't want to display your anniversaries in Calendar, you can turn off show through.

1. Choose Section - Show Through.



2. Click the "Show into" box and select "Calendar" as the section to show into.
3. (Optional) Under "From," deselect "Anniversary" if you don't want your anniversaries to appear in Calendar.

   Note If you want to redisplay your anniversaries in Calendar, select "Anniversary" again.
4. (Optional) Click Preferences and select options for whether anniversaries appear above or below appointments and how much of the anniversary's description to show in Calendar. Click OK to confirm your preferences.
5. Click OK.

Tip To print shown-through items, use any of the following print layouts: "Monthly Calendar," "Daily Page," or "Weekly 2-Page."

{button ,AL(`H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Overview: Bubble help

Bubble help gives you information in a bubble when you point to an area of the Organizer screen. Bubble help is only available if you use a mouse. Bubble help is not available when a dialog box appears.

Bubble help is a toggle feature. To turn bubble help on or off, do one of the following actions:

- Choose Help - Bubble Help.
- Press CTRL+F1.
- Choose File - User Setup - SmartIcons Setup and select "Show icon descriptions (bubble help)."
- Click .

When you position your mouse over an area of the screen for which bubble help is available, the mouse pointer turns into a bubble with a description of the area of the screen your mouse is pointing to.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Context-sensitive Help

Organizer provides Help based on the function or menu you're using. If you want an overview of an Organizer section, move to the section and click  or press F1.

Organizer displays a Help topic that discusses the section.

To see context-sensitive Help for the Organizer menus, choose a command from the main menu, move the mouse pointer to a command on the pull-down menu, and press F1. Organizer displays a description of the commands. Where appropriate, Help includes cross-references that explain how to use the command in more detail.

If you're in a dialog box, you can click the Help command button or press F1 for information about the contents of the dialog box.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Cross-references

Many Help topics contain cross-references to other related Help topics.

Cross-references appear in green (gray on a monochrome system) with a solid underline. Cross-references are the title of another related Help topic or the words "See details," in which there are details about a topic you're reading.

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.

You can display other cross-referenced information by clicking the "See details" or "See related topics" boxes. "See details" can appear below a step or at the bottom of some Help topics. "See related topics" appears at the bottom of some Help topics.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Help topics

To display Help topics, choose Help - Help Topics.

There are several ways to find information in the Help system from this dialog box.

- To find information by reading a Contents page and selecting a Help topic in much the same way that you would use a Table of Contents in a paper-based book, click the Contents tab.
- To find information by seaching for a Help topic by entering a keyword, in much the same way that you would use an Index in a paper-based book, click the Index tab.
- To find information by searching for specific words, click the Find tab.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Help buttons

Once you go to a Help topic, the following buttons appear at the top of the window for Help.

Help Topics

Displays the main Help window.

Print

Prints the Help topic.

Go Back

Displays the last Help topic you viewed. You can move back through each topic, one at a time until you reach the first topic.

Note If you select "See related topics" in a Help topic, the following buttons appear at the bottom of the Topics found window:

- Display - Takes you to the Help topic you selected.
- Cancel - Returns you to the original Help topic.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Using the right mouse button in the Help window

When you're working in Help, you can right-click to get the right mouse menu to annotate, copy, print, change the font size, display the Help window on top or not, or change the system colors.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Organizer Help menu

When you're working in Organizer, you can choose the Help command in the main menu to display additional commands.

Help Topics

Displays the Help Topics dialog box.

Bubble Help

Toggles bubble help on and off.

Lotus Internet Support

Displays the Lotus Internet Support items.

Tour

Runs the Organizer 97 Tour.

About Lotus Organizer

Displays Organizer release and copyright information.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Using Help

Organizer provides Help for every menu item, dialog box, and function, giving you easy access to information about how to do an Organizer task. It also provides Help for every command, keyboard shortcut, as well as troubleshooting information, and what's new for this release of Organizer. There are several ways to access Help (online documentation).

- Choose Help - Help Topics from the Organizer main menu to get Help topics from Contents, Index, and Find.
- Choose Help - Bubble Help to display short descriptions of areas of the Organizer screen.
- Press F1, click , or click a Help button in a dialog box to display context-sensitive Help while you're working in Organizer.

You can display and work in your current Organizer file while a Help window is open. You can resize, move, tile, or cascade the Organizer window or the Help window to make it easier to display and follow Help procedures while in your Organizer file. You can also add Help to the taskbar as an icon.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Calendar section

You can use Calendar to manage your time and view appointments at a glance. With Calendar you can

- Schedule and change appointments and meetings
- Customize the way Calendar looks and the way appointments appear in it
- Track meeting invitations
- Show information from other sections

A meeting is an appointment for more than one person. You schedule a meeting by creating an appointment and then inviting others to it. Most of the same options you use for appointments—such as creating a repeating appointment, setting an alarm for an appointment, and assigning a cost code—also apply to meetings.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CHANGING_THE_CALENDAR_DISPLAY_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS;H_SHARING_CALENDARS_STEPS;H_CALENDAR_VIEWS_OVER;H_OVERVIEW_WORKING_WITH_MULTIPLE_CALENDARS_OVER',0)} See related topics

Details: Adding a calendar to Multiple Calendar view

Adding a calendar in other ways
You can also display the Add Calendar dialog box by right-clicking the title bar of an open calendar and choosing Add Calendar.

Displaying Multiple Calendar view
To display Multiple Calendar view, choose View - Day per Page, and then choose View - Multiple Calendars. The "Display timeslots for Day per Page View" option in the Calendar Preferences dialog box must be selected in order to display Multiple Calendar view.

Getting access to someone else's file
You can display another user's calendar if you have the appropriate access level privileges in the other user's mail file. Your privileges also determine whether you can make changes to the calendar in Organizer.

The owner of the file uses the Delegation Profile in Notes to allow other users to read or manage their calendar in Organizer. To display the Delegation Profile, in your mail file in Notes, choose Actions - Calendar Tools - Calendar Profile to display the Notes Calendar Profile and click "Allow other users to view your calendar."

If the owner selects "Everyone can read my Calendar" in the Delegation Profile, you can add and read the calendar, but can't create entries or respond to meeting invitations.

If the owner selects "Everyone can manage my Calendar," you can add the calendar and create entries in it. You can also schedule meetings and respond to meeting invitations for the owner. The owner can also specify only certain users who can read or manage their Organizer information.

Note If you want to use filters in the calendar you add, the owner of the file must grant you Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile.

See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

Opening a file by user name
You can either enter the user name or select the user name from the list.

As you enter a user name in the "File name" box, Organizer attempts to match the letters you enter with names in the list and supply the rest of the name. You can also change the Address Book. Click the "Address" box and make your selection.

Opening a file by database name
Under "Server," you can select the Notes server where the file you want to add the calendar from is located. Choose "Local" to specify a file located on your own computer.

Under "Database," enter the name of the file containing the calendar you want to open. Be sure to include the path to the location of the file on the server (for example, \mail\EMurray.NSF).

If you chose "Local" under "Server," enter only the name of the file (for example EMurray.NSF). Organizer can only open files located in the subdirectory specified in Notes User Preferences under "Local database folder." The default is typically the Notes \DATA directory (for example, C:\NOTES\DATA).

To change or view your Notes User Preferences, in Notes, choose File - Tools - User Preferences. See the Notes Help system for more information on User Preferences.

Showing entries in Multiple Calendar view
While in Multiple Calendar view, Organizer does not display entries from other sections in either your calendar or in the calendars you add. Show through entries will reappear in your calendar when you switch to another view.

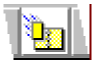
Changing the name of a calendar in other ways
You can also change the name of an open calendar by right-clicking the title bar of the calendar and choosing Rename Calendar. Type a new name and click OK.

Rearranging calendars
To change the position of a calendar, click and hold on the calendar title, and drag the calendar to a new location.

{button ,AL(`H_ADDING_A_CALENDAR_TO_MULTIPLE_CALENDAR_VIEW_STEPS',1)} Go to procedure

Adding a calendar to Multiple Calendar view

1. In Multiple Calendar view, choose, View - Add Calendar.



See details

2. For "From," enter the user name of the person whose calendar you want to display, or enter a database name.

   Click Browse to see a list of files by user name or to specify a file by server and database name.

   See details

3. In the "Calendar" box, select the calendar you want to include.
4. (Optional) For "Title," enter the name of the user whose calendar you're displaying.

   The title you enter appears in a title bar above the calendar. If you don't enter a title, Organizer assigns a title of "Calendar" with a number increment, for example, "Calendar 1."

5. Click OK.

Note You can add up to 15 calendars.

{button ,AL(`H_ADDING_A_CALENDAR_TO_MULTIPLE_CALENDAR_VIEW_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_WORKING_WITH_MULTIPLE_CALENDARS_OVER;H_CALENDAR_VIEWS_OVER;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;H_REMOVING_A_CALENDAR_FROM_MULTIPLE_CALENDAR_VIEW_STEPS;',0)} See related topics

Details: Changing preferences in Calendar

Displaying the increments of time slots

The time slot increments are determined by the entry you select in the Calendar Preferences dialog box. For example, if you select 30 minutes, there are time slots every 30 minutes (for example, 8:00, 8:30, 9:00, 9:30, and so on). When you select a day in the Calendar, Organizer displays the time slots for that day. In most Calendar views, Organizer displays only the time slots for which you scheduled an appointment until you select that day.

If you selected to display time slots in the Day per page view, Organizer displays all time slots, both scheduled and available time slots, whether you select the day or not.

Displaying symbols with entries

Under Options, you can select the following symbols to show information about an appointment. Except for , these symbols appear with the appointment in Calendar, when appropriate.

Symbol	Result
	Indicates that an appointment is confidential.
	Indicates that an appointment has an alarm.
	Indicates that an appointment is a repeating entry.
	Indicates that you have penciled in a meeting.
	Indicates that the entry is a meeting.
	Indicates that a category symbol appears with appointments. The symbol for the category you have specified appears with each appointment.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS',1)} Go to procedure
{button ,AL(`H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Changing the days start and end times for Organizer in Notes

To specify the times at which your days start and end in your calendar, you make changes in your Calendar Profile in Notes.

1. In Notes, choose Actions - Calendar Tools - Calendar Profile.
2. Under "Allowable free times," for the first day of the week that has allowable free time, specify the hours that you normally work each day.

   The first hour you specify in the box sets the days start time; the last hour that you specify in the box sets the days end time.

   For example, let's say that the first day of the week that has allowable free time is Monday, and that you work from 7:00 A.M. to 12:00 P.M. and from 1:00 P.M. to 4:00 P.M. In the "Monday" box, enter 7:00 AM - 12:00 PM, 1:00 PM to 4:00 P.M. The days start time would then be set to 7:00 A.M., and the days end time would be set to 4:00 P.M.

   Note The times you indicate for the first day of the week that has allowable free time affect all days in Organizer. You can specify different allowable free times for each day of the week, which affects your free time schedule when other users can look up your free time for meetings. However, Organizer uses only the times you specify for the first day of the week that has allowable free time to determine the days start and end time for all days of the week. For more information on specifying allowable free time in Notes, see Notes Help.
3. Click OK.

   Your changes will take effect the next time you start Organizer 97 GS.

{button ,AL(`H_DISPLAYING_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_STEPS;H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Customizing the appearance of your Calendar section (continued)

Option	Result
Show time tracker	Shows (default) or doesn't show time tracker when you select an appointment to edit it directly on a Calendar page.
Include weekends in Find Time search	Determines whether Organizer does or doesn't (default) include weekends when searching for the next available appointment time. (When you create or edit an appointment, you can choose to find the next available time.)
Turn to entry after Create/Edit	After you create or edit an appointment, Organizer goes (default) or doesn't go to the page on which the appointment appears.

Note Under Options, you can select the following symbols to show with your appointments. Except for , these symbols appear with the appointment in Calendar, when appropriate.

Symbol	Result
	Indicates that an appointment is confidential.
	Indicates that an appointment has an alarm.
	Indicates that an appointment is a repeating entry.
	Indicates that a category symbol appears with appointments. The symbol for the category you specified appears with each appointment.
	Indicates that an appointment is a meeting.

Back

Customizing the appearance of your Calendar section

Option	Result
Time slots	Lets you set the time increments for appointments in your Calendar. The default is 30 minutes.
Default duration	Lets you set the default duration for appointments. The default is 60 minutes.
Show	Shows or doesn't show (default) a symbol to indicate that you protected, set an alarm for, repeated, penciled in, and/or assigned a category to an appointment. (See Note below.)
Display time slots for Day per Page view	Displays (default) or doesn't display time slots in the Day per Page view. The default time slot is 30 minutes.
Show conflicts	Alerts (default) or doesn't alert you when you create an appointment that conflicts with another appointment.

Continue

Overview: Working with multiple calendars

Multiple Calendar view lets you display two or more calendars side by side. For example, you can review your calendar and another user's calendar at the same time.

To display multiple calendars, Organizer must be in Day per Page, time slot view. The same time slots appear for each calendar you add. If you move to a different set of time slots in one calendar, Organizer automatically displays the corresponding time slots in all other calendars.

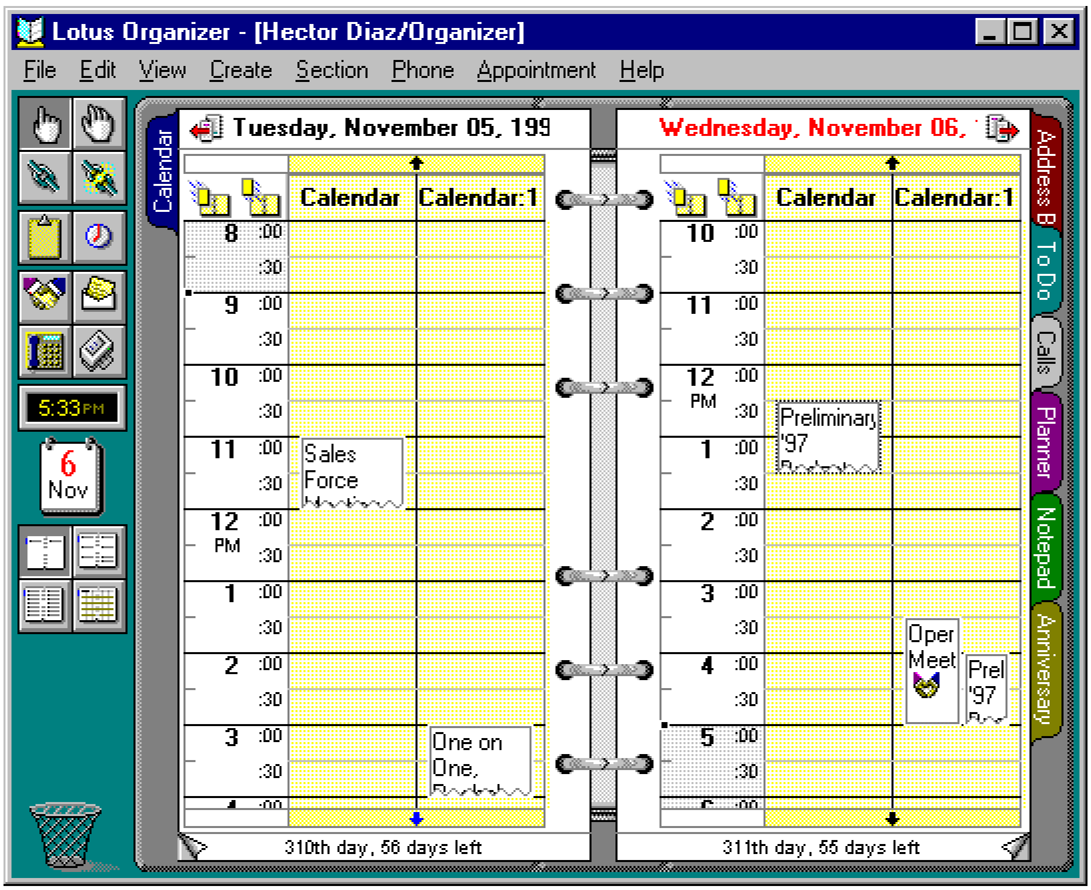
You can work in any displayed calendar for which you have sufficient access rights. For example, if someone has given you write access to a calendar you are displaying, you can make appointments in that calendar, change the description or date of existing appointments, or change the options (such as alarms or categories) of existing appointments. Access rights for other calendars are granted using the Notes Delegation Profile.

You can't copy or move appointments between calendars in Multiple Calendar view. You also can't change the Calendar preferences for other calendars. The Calendar preferences you set apply only to your own calendar.

While in Multiple Calendar view, Organizer does not display entries from other sections in either your calendar or in the calendars you add. Show through entries will reappear in your calendar when you switch to another view.

To change the position of a calendar, click and hold on the calendar title, and drag the calendar to a new location. To increase the area in which to display your calendars, unfold the calendar page.

The following illustration shows two calendars in Multiple Calendar view. The dotted lines designate areas for which there is additional Help. Click within one of these areas to display its Help topic.



{button ,AL(`H_ABOUT_CALENDAR_OVER;H_CALENDAR_VIEWS_OVER;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;H_ADDING_A_CALENDAR_TO_MULTIPLE_CALENDAR_VIEW_STEPS;H_REMOVING_A_CALENDAR_FROM_MULTIPLE_CALENDAR_VIEW_STEPS',0)} See related topics

Penciling in an invitation

You can pencil in, or tentatively agree, to a meeting before formally responding. The hands in  shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.

2. Under Notices, double-click a meeting invitation to open it.
   See details
3. Review the details of the meeting on the Invitation tab.
   See details
4. (Optional) To see the other people invited to the meeting, click the Attendees tab.
5. (Optional) To see a view of the free time of the other people invited to the meeting, click the Free time tab.
   See details
6. Click the Meeting tab and select Pencil in.   You can also use the Meeting dialog box to specify other options, such as how the meeting appears in your calendar, a cost code, or an alarm for the meeting.
7. (Optional) To send a message to the chairperson with your response, click the Reply tab and enter a message under To.
8. Click Accept.
9. Click OK.
10. If you're done processing meeting notices, click Close.

Organizer adds the meeting to your Calendar with a pencil symbol () and sends your tentative acceptance along with any reply to the chairperson as a Notes mail message. You can later accept, decline, or delegate the meeting.

{button ,AL(`H_PENCILING_IN_AN_INVITATION_DETAILS',1)} See details

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_VIEWING_THE_STATUS_OF_ATTENDEES_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_ASSIGNING_A_COSE_CODE_TO_AN_ENTRY_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_MAKING_AN_APPOINTMENT_STEPS;',0)} See related topics

Overview: Calls section

The Calls section lets you create Calls entries to keep track of your phone calls. With the Calls section, you can do the following activities:

- Record both your incoming and outgoing calls, including information on who the call was from or to, the duration of the calls, and any notes on the calls.
- Track the status of follow-up calls.
- Automatically track the duration of a call when you answer it.
- Assign a cost code to a Calls entry.
- Schedule calls you want to make at some future date and set an alarm to remind yourself.
- Quickly redial unanswered calls.
- Dial any phone number that appears in your Address section, Calls section, or any other section.
- Show through Calls entries in your Calendar section.

Note You must install and set up a modem to make calls from Organizer.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Changing preferences in Calls

Displaying alphabetical and date tabs

Calls uses page tabs to group information within the section. The tabs you see depend on the way you sort your Calls entries.

If you sort your Calls entries by person, company, or category, Organizer displays alphabetical tabs. If you sort by date, Organizer displays tabs with months.

If you sort your Calls entries by status, Organizer sorts and displays Calls entries by status: Planned, Try Later, Answered, Incoming, Left Message, Calling Back, No Answer, Follow Up, or Busy. If you sort your Calls entries by number, Organizer sorts and displays each Calls entry by phone number. If you sort your Calls entries by incomplete, Organizer sorts and displays Calls entries incomplete first, and then completed, in date and time order.

You can click a page tab to go to that page. If there are no page tabs, turn the pages by clicking the page turners in the bottom left and bottom right corners.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS',1)} Go to procedure

Changing preferences in Calls

Calls preferences determine how Calls entries are sorted in your Calls section and what information appears with them. Changing preferences is optional; if you don't change your Calls preferences, Organizer uses the default preferences.

1. Go to the Calls section and choose View - Calls Preferences.
2. Under "View," select the appropriate option for how you want Organizer to sort your Calls entries.
3. Under "Options," select the appropriate options to customize the appearance and function of the Calls section.
   See details
4. Under "Show," select the appropriate options you want to appear with your Calls entries.
5. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Changing the sort order of Calls entries

How sorting affects Calls sort tabs

Calls uses page tabs to group information within the section. The tabs you see depend on the way you sort your Calls entries.

If you sort your Calls entries by person, company, or category, Organizer displays alphabetical page tabs. (Organizer includes # for Calls entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.) If you sort by date, Organizer displays tabs with month names.

{button ,AL(`H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',1)} Go to procedure
{button ,AL(`;H_CHANGING_PREFERENCES_IN_CALLS_STEPS',0)} See related topics

Changing the sort order of Calls entries

You can sort Calls entries by name, company, date, category, status, telephone number, and so on. At any time, you can change how you want to sort your Calls entries.

1. Go to the Calls section.
2. Choose View.
3. Choose one of the following commands: By Person, By Company, By Date, By Category.

{button ,AL(`H_CHANGING_THE_SORT_ORDER_OF_CALLS_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;',0)} See related topics

Customizing the appearance of your Calls section

Option	Result
Start headings	Places your Calls entries one after another on the same page, each Calls entry starting at the top of the next page, each Calls entry starting on the left page, or each Calls entry starting on the right page (default).
Show page tabs	Shows (default) or doesn't show the Calls page tabs.
Show	Shows or doesn't show (default) a symbol indicating that you made a Calls entry confidential, set an alarm for it, set it to repeat, or assigned it a category. (See Note below.)
Show completed calls	Shows (default) or doesn't show Calls entries that are completed. When you show completed Calls entries, Organizer displays the entry with a check mark.
Strikethrough	Shows or doesn't show (default) text in completed Calls entries with a line through the text.
Turn to entry after Create/Edit	Goes or doesn't go (default) to the page the Calls entry is on after you create or edit a Calls entry.

Note Under "Options," you can select the following symbols to show information about a Calls entry. Except for , these symbols appear with the Calls entry, when appropriate.

Symbol	Result
	Indicates that a Calls entry is confidential.
	Indicates that a Calls entry has an alarm.
	Indicates that a Calls entry is a repeating entry.
	Indicates that a category symbol appears with your Calls entries. The symbol for the category you specified appears with each Calls entry.

Details: Deleting a Calls entry

Keyboard shortcuts
You can also select the entry and press CTRL+X or DEL to delete a Calls entry.

Deleting a Calls entry in other ways

You can also select the entry and choose Edit - Cut, Edit - Clear, or click  to delete a Calls entry.

{button ,AL(`H_DELETING_A_CALL_STEPS',1)} Go to procedure
{button ,AL(`;H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS',0)} See related topics

Deleting a Calls entry

1. Select the Calls entry you want to delete.
2. Drag and drop the Calls entry to

 in Toolbox.

Note To retrieve a deleted Calls entry, choose Edit - Undo Calls Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_A_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Editing a Calls entry

Keyboard shortcuts
You can also select an entry and press CTRL+E to edit a Calls entry.

Editing Calls entries in other ways
You can also select an entry and choose Edit - Edit Calls to edit a Calls entry.

Editing the existing text of your Calls entry
To edit the existing Calls entry text, click the Calls entry to select it, and click the text you want to edit. When you're done editing, press F2 to enter your changes.

Adding information to Calls entries you previously left blank
If you want to add information in fields you previously left blank, you must do that in the Edit Call dialog box. Choose Edit - Edit Call. When the Edit Call dialog box appears, make your changes, and click OK.

{button ,AL(`H_EDITING_A_CALL_STEPS',1)} Go to procedure

{button ,AL(`;H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_STEPS',0)} See related topics

Editing a Calls entry

1. Double-click the Calls entry.
2. Edit the Calls entry.

   See details

Tip Press TAB to move between options in the Edit Call dialog box.

3. Click OK.

{button ,AL(`H_EDITING_A_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Creating a Calls entry

Creating Calls entries in other ways
You can also choose Create - Call or press INS when you are in the Calls section to create a Calls entry.

Entering the contact name and company
If you entered names and addresses in the Address section, they appear in the "First name," "Last name," and company boxes.

Organizer attempts to match any part of the Address record you specify with the rest of the Address record. For example, if you click the "Last name" box and select a name from the list, Organizer supplies the person's company name and phone number.

Entering the contact phone number
After you select a contact name or company name, you can click the "Phone at" box to select any phone number associated with that name or company. If you don't use an Address record to specify information for your call, the "Phone at" box uses "The phone number entered below." In this case you must specify a phone number for the "Phone number" box.

Note If you use a phone number from an Address record to dial a call, you must include ( ) (parentheses) around the phone number's area code in the Address record, for example, (508) 555-1234.

Specifying the date and time of a call
If you're planning a Calls entry for the future, you can enter the date and the time you want to make the Calls entry. If you're creating a Calls entry you already made, you can optionally include the duration of the Calls entry.

If you set the duration of the call by clicking the "Time" box and use time tracker, Organizer automatically adjusts the duration of the call in "Duration." You can also click + (plus) to increase or - (minus) to decrease the duration.

If you're creating a Calls entry as you're making the call, you can click the stopwatch when you start the phone call. The Organizer stopwatch automatically times the duration of the call, until you click the stopwatch again, at the end of your phone call.

Dialing the Calls entry
You can click Dial to dial the number of the Calls entry you created. You must install a modem and set up the modem in the Windows 95 Control Panel before dialing a phone number from Organizer.

{button ,AL(`H_INSERTING_A_CALL_STEPS',1)} Go to procedure

Creating a Calls entry

1. Go to the Calls section and double-click the Calls page.

2. Enter the contact's first name, last name, and company.
   See details
3. Click the "Phone at" box and select the telephone number you want to use.
   See details
4. Under "Phone number," specify the appropriate options.
   See details
5. Click the Notes tab.
6. Under "Notes," enter a description of the Calls entry.
7. If necessary, click the "Date" and "Time" boxes and select a date and time for the call.
   See details
8. Select the following options for the Calls entry: "Categories," "Status," "Completed," "Confidential."
9. Click OK.

Tip To create additional Calls entries, click Add before you click OK. When you finish entering all your Calls entries, click OK.

{button ,AL(`H_INSERTING_A_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS;H_DIALING_A_NUMBER_STEPS',0)} See related topics

Details: Creating a follow-up Calls entry

Creating a follow-up Calls entry in other ways
You can also create a follow-up Calls entry for a Calls entry by choosing Edit - Edit Call and clicking Follow Up in the Edit Call dialog box.

Linking a follow-up Calls entry to the original Calls entry
If you don't deselect "Link to," by default, Organizer automatically links the follow-up Calls entry you're creating to the original Calls entry.

{button ,AL(`H_INSERTING_A_FOLLOWUP_CALL_STEPS',1)} Go to procedure

{button ,AL(`;H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_STEPS',0)} See related topics

Creating a follow-up Calls entry

1. Go to the Calls section.
2. Select the Calls entry you want to create a follow-up call for and choose Call - Follow Up.
3. If necessary, enter the date, time, and duration of the follow-up call.
4. Under "Notes," add any additional information or edit information in the description of the follow-up Calls entry.
5. Click the Contact tab.
6. If necessary, edit any other part of the Calls entry for the Contact panel.
7. (Optional) If you don't want the Calls entry to be linked to the original Calls entry, click "Link to" to deselect the option.

   See details
8. Click OK.

{button ,AL(`H_INSERTING_A_FOLLOWUP_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Creating a Calls entry for incoming calls

Entering information about the caller

If you entered information about the caller in your Address section, you can access the caller's Address record when you specify these fields. If you click the "Last name" box, Organizer lists the last names in the Address section; if you click the "Company" box, Organizer lists company names.

Organizer attempts to match any part of the Address record you specify with the rest of the record. For example, if you click the "Last name" box and select a name from the list, Organizer supplies the person's company name and phone number. If you can't use an Address record to specify information about the call, the "Phone at" box uses "The phone number entered below," and you must specify a phone number for the "Phone number" box.

{button ,AL(`H_LOGGING_AN_INCOMING_CALL_STEPS',1)} Go to procedure

Creating a Calls entry for incoming calls

If you answer a phone call and you want to track information about the call in a Calls entry, Organizer offers a shortcut.

1. Choose Phone - Incoming Call.

Organizer displays the Answer Call dialog box.

2. Click the Notes tab.

   The current date and time are already entered.

3. Under "Notes," enter a description of the Calls entry.
4. When you finish your call, click the stopwatch to stop timing your call.
5. Select the following options for the call: "Categories," "Status," "Completed," "Confidential."
6. Click the Contact tab.
7. Enter the appropriate information about the person: first name, last name, company, and phone number.

   See details

8. Click OK.

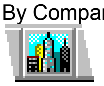
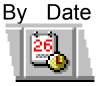
Tip To create additional Calls entries, click Add before you click OK. When you finish entering all your Calls entries, click OK.

{button ,AL(`H_LOGGING_AN_INCOMING_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Selecting a sort order

The Sort icons appear in Toolbox. You can click one instead of choosing the command.

Option	Result
By Name 	Sorts and displays Calls entries by last name (default).
By Company 	Sorts and displays Calls entries by company name.
By Date 	Sorts and displays Calls entries by date and time.
By Category 	Sorts and displays Calls entries by category.

Selecting a sort order

Option	Result
Person	Sorts Calls entries by last name (default).
Company	Sorts and displays Calls entries by company name.
Date	Sorts and displays Calls entries by date and time.
Category	Sorts and displays Calls entries by category, and includes # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.
Status	Lets you select the criteria by which to sort and display Calls entries. You can choose "Status" (default), "Number," or "Incomplete."

Selecting what you see with Calls entries

Show options let you see a variety of information associated with each Calls entry.

Option	Result
Name	Shows (default) or doesn't show the name of the person the Calls entry is to.
Company	Shows (default) or doesn't show the name of the company the Calls entry is to.
Status	Shows (default) or doesn't show the status of the Calls entry.
Categories	Shows or doesn't show (default) the names of the categories you assigned the Calls entry.
Lines of description	Shows a specified number of lines of description with the Calls entry. You can enter a number or click + (plus) to increase or - (minus) to decrease the number of lines. (The default is 3.)
Number	Shows (default) or doesn't show the phone number of the Calls entry.
Date & time	Shows (default) or doesn't show the date and time of the Calls entry.
Cost code	Shows or doesn't show (default) the cost code you assigned the Calls entry.

Setting phone number options

Option	Result
Use Country and Area codes	Uses (default) or doesn't use the country and area codes of a telephone number when Organizer dials a telephone number.
Area code	Lets you specify the area code of the telephone number you want to call.
Phone number	Lets you specify the telephone number you want to call.
Ext	Lets you specify the extension number of the telephone number you want to call.
Country code	Lets you select a specific country code for a Calls entry.

Details: Showing Calls entries in your Calendar

Working with Calls entries in Calendar
Showing Calls entries in Calendar lets you see your Calls entries on their appropriate calendar day, along with your appointments.

Editing a Calls entry in Calendar
If you want to edit a Calls entry and you're in the Calendar section, double-click the Calls entry. The Edit Call dialog box appears. Make your changes and click OK.

Rescheduling a Calls entry in Calendar
If you want to reschedule a call and you're in the Calendar section, drag and drop the Calls entry to a different day. The date of the Calls entry automatically changes; the time stays the same. If you want to reschedule a Calls entry to a day that doesn't appear on your screen, click in Toolbox, select the Calls entry, go to the day you want, and double-click.

Showing entries while displaying time slots in Day per Page view
If you're using the Day per Page view with time slots, the entries you show through in Calendar don't scroll out of view as you scroll through the day's appointments; that is, these entries stay either above or below the time slots.

Organizer blocks out an area at the top or bottom of your appointments for entries you show through in Calendar. You can expand or shrink this block by dragging the solid box in the bottom-right corner. The new size of this area affects all pages in the Day per Page view.

You can also drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

- New size to use the size you dragged for all pages.
- Temporary size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16 the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

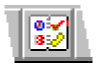
{button ,AL(`H_SHOWING_CALLS_ENTRIES_IN_YOUR_CALENDAR_STEPS',1)} Go to procedure

{button ,AL(`H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_EDITING_A_CALL_STEPS',0)} See related topics

Showing Calls entries in Calendar

By default, Organizer shows entries from To Do, Calls, Planner, and Anniversary sections on the appropriate day in Calendar. Showing entries from other sections can help you see your upcoming commitments in the context of your daily work, for example, you can see any calls entries you entered along with your appointments. You can change the way your calls entries appear in Calendar, and if you don't want to display your calls entries in Calendar, you can turn off show through.

1. In the Calls section, choose Section - Show Through.



2. Click the "Show into" box and select Calendar.
3. (Optional) Under "From," deselect "Calls" if you don't want your calls entries to appear in Calendar.

   Note If you want to redisplay your calls entries in Calendar, select "Calls" again.
4. (Optional) Click Preferences and select options for whether calls entries appear above or below appointments and how much of the calls entry's description to show in Calendar. Click OK to confirm your preferences.
5. Click OK.

Tip To print shown-through items, use any of the following print layouts: "Monthly Calendar," "Daily Page," or "Weekly 2-Page."

{button ,AL(`H_SHOWING_CALLS_ENTRIES_IN_YOUR_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS',0)} See related topics

Specifying Calls entry options

Option	Result
Category	Lets you assign one or more categories to a Calls entry.
Status	Lets you assign a status to a Calls entry: "Planned," "Try Later," "Answered," "Incoming," "Left Message," "Calling Back," "No Answer," "Follow up," and "Busy."
Completed	Lets you mark the Calls entry completed.
Confidential	Makes or doesn't make (default) the Calls entry confidential, so others accessing your file can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Overview: Categories

Categories help you manage entries and keep track of related entries across sections. You can assign one or more categories to any Organizer entry. You can then use these categories to view and find entries.

For example, you may want to create a category for all entries that apply to a particular project. You can create the category, and then assign the entries in various sections to the category. This would make it easy to view and work with all appointments, Calls entries, To Do tasks, and other entries that pertain to a project.

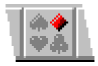
Organizer includes a number of common categories, including Calls, Clients, Expenses, Ideas, and more. You can use these categories and also create or customize your own categories.

{button ,AL(`H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Details: Assigning a category to an entry

Assigning a category to an already created entry in other ways
You can also use a menu command or an icon to assign one or more categories to an entry you select.

To use a menu command, select the entry and, depending on the section you are in, choose one of the following commands: Appointment - Categorize, Task - Categorize, Address - Categorize, Calls - Categorize, Event - Categorize, Page - Categorize, or Anniversary - Categorize. Select the categories for the entry from the list under Categories or enter a new category.

To use an icon, select the entry and click  from the SmartIcons bar or another set of SmartIcons. Select the categories for the entry from the list under Categories or enter a new category.

Creating a new category
If you enter a new category name in the "New Categories" box, Organizer creates the category and adds it to the available categories list for the current file. Organizer doesn't automatically associate an icon with a new category you create. To do this, click the "Symbol" box and choose a symbol from the list to be associated with the new category you created.

Removing a category from an entry
To remove a category from an entry, display the Create or Edit dialog box for the entry.   For "Categories," highlight the category name you assigned in the box, and press DEL. Click OK to remove the category from the entry.

{button ,AL(`H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS',1)} Go to procedure

Assigning a category to an entry

You can assign a category when you create or edit an entry.

1. Create or edit an entry.

   The Create or Edit dialog box appears.
2. Click the "Categories" box and select one or more categories from the list that appears or enter a new category name.
3. Enter any other necessary information for the entry.
4. Click OK.

Tip You can also assign a category to an entry by selecting the entry and displaying the Categorize dialog box. See details

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{button ,AL(`H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS;',0)} See related topics

Details: Creating a new category

Creating a number of categories at once

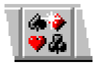
For "Name," you can enter more than one name if you want to create a number of different categories at one time. Separate the new category names with commas. For example, to enter two new categories named Work and Home, type Work,Home. When you click Add, Organizer creates the new categories as two separate categories.

If you want to associate a single symbol with all the categories you create at one time, click the "Symbols" box and select a symbol before you click Add. To associate different symbols with individual categories, click the symbol with each category you assign before you enter a , (comma) or before you click Add.

{button ,AL(`H_CREATING_A_CATEGORY_STEPS',1)} Go to procedure

Creating a new category

1. Choose Create - Categories.



2. For "Name," enter a new category name.
   See details
3. (Optional) Click the "Symbol" box to select a symbol to associate with the category from the list that appears.
4. Click Add.
5. Click OK.

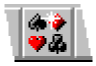
Tip You can also create a category from any Create or Edit dialog box by entering the new name for "Categories."

{button ,AL(`H_CREATING_A_CATEGORY_DETAILS',1)} See details

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Deleting a category

1. Choose Create - Categories.



2. In the "Categories" box, select a category.
3. Click Delete.
4. Click Yes when Organizer prompts you whether you want to delete the category.

Caution You can't undo deleting a category.

5. Click Close.

Organizer deletes the category and also removes it from any entries.

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Displaying categories with entries

You use a section's Preferences dialog box to specify that you want to display the category and/or category symbol with entries in that section.

1. Depending on the section you are in, choose View - Calendar Preferences, View - To Do Preferences, View - Address Preferences, View - Calls Preferences, View - Notepad Preferences, or View - Anniversary Preferences.
2. Under "Show," select "Categories" to display the category name with entries.

Note This option is not available in the Address and Planner sections.

3. Under "Options," select the category symbol to display category symbols with entries.

Note This option is not available in the Address and Planner sections.

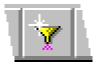
4. Click OK.

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Displaying entries in a particular category

To display entries in a particular category, you must create a filter that specifies the category and the sections you want to affect.

1. Choose Create - Filters.

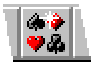


2. Click New.
3. For "Name," enter a name for the filter, for example, the name of the category.
4. Click the "Section" box and select a section from the list that appears.
5. Click the "Field" box and select Categories from the list that appears.
6. Click the "Test" box and select Contains from the list that appears.
7. Under "Value," enter the name of the category.
8. If you want to use the filter in other sections, click the "And/Or" box and select "Or."
9. (Optional) If you want to add the filter to the Apply Filter menu, select "Show in View - Apply Filter menu."
10. Click OK.
11. Repeat steps 4 - 10 for each section you want to filter.
12. Select the filter you want to apply.
13. Click Apply to apply the filter. If you don't want to apply the filter, click Close.

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_ABOUT_FILTERS_OVER;H_APPLYING_A_FILTER_STEPS',0)} See related topics

Renaming a category

1. Choose Create - Categories.



2. For "Categories," select a category.
3. Click Rename.
4. For "New name," enter a new name for the category.
5. Click OK to confirm this name.
6. Click OK.

Organizer also changes the category name for any entries you assigned with that category.

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Overview: Creating a cost code

A cost code lets you track the costs associated with an entry. For example, you can associate all your meetings with a client with a specific cost per hour.

When you set a cost code, you can export this information along with other information from the entry to another application for analysis. For example, if you set a cost code for all meetings with a client, you could set up a spreadsheet that produces billing for the client or the customer.

You can set cost codes for entries in the following sections: Calendar, To Do, Calls, Planner, and Anniversary.

{button ,AL(`H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Details: Assigning a customer code and cost code to an entry

Keyboard shortcuts
You can also use a function key to assign a customer code and cost code. Select the entry and press F8.

Assigning a customer and cost code in other ways
You can also use a menu command to assign a customer code and cost code. Select the entry and, depending on the section you're in, choose one of the following commands: Appointment - Cost, Task - Cost, Calls - Cost, Event - Cost, or Anniversary - Cost.

Creating a new customer code and/or cost code
If you enter a new customer code and/or cost code, Organizer creates the customer code and/or cost code and adds it to the available cost codes list for the current file.

Displaying entries with a particular cost code
To display only entries with a certain cost code, you must create a filter that specifies the cost code and the sections you want to affect.

{button ,AL(`H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',1)} Go to procedure
{button ,AL(`H_CREATING_A_FILTER_STEPS',0)} See related topics

Assigning a customer code and cost code to an entry

You can assign a customer code and cost code when you create or edit appointments, tasks, calls, events, and anniversaries.

1. Create or edit an entry.

   The Create or Edit dialog box appears.

2. Click Cost.
3. Click the "Customer code" and "Cost code" boxes and select a customer code and cost code from the lists that appear or enter a new code.

   See details

4. Click OK to return to the Create or Edit dialog box.
5. Click OK.

{button ,AL(`H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_ABOUT_COST_CODES_OVER;H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS;H_MAKING_AN_APPOINTMENT_STEPS;H_INSERTING_A_PLANNER_EVENT_STEPS;H_INSERTING_A_CALL_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_INSERTING_AN_ANNIVERSARY_STEPS',0)} See related topics

Details: Creating a customer code and cost code

Creating a customer code and cost code in other ways
You can also create new customer codes and cost codes by right-clicking in the binder area of the Organizer desktop, and then selecting Cost Codes when the menu appears.

{button ,AL(`H_CREATING_A_COST_CODE_STEPS',1)} Go to procedure

Creating a customer code and cost code

1. Choose Create - Cost Codes.

2. Under "Code," enter a customer code (for example, a client's name).
3. Click Add.
4. Under "Cost," enter a billing cost per hour.
5. Click Add.
6. Click OK.

Tip You can enter as many customer codes and cost codes as you want before you click OK.

{button ,AL(`H_CREATING_A_COST_CODE_DETAILS',1)} See details

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Deleting a customer code and cost code for an entry

1. Select the entry.
2. Depending on the section you are in, choose Appointment - Cost, Task - Cost, Calls - Cost, Event - Cost, or Anniversary - Cost.
3. Select the "Customer code" entry and press DEL.
4. Select the "Cost code" entry and press DEL.
5. Click OK.

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Deleting a customer code and cost code

1. Choose Create - Cost Codes.

2. Select the customer code you want to delete from the "Customer codes" list.
3. Click Delete.
4. Select the cost code you want to delete from the "Cost codes" list.
5. Click Delete.
6. Click OK.

Caution You can't undo deleting a customer code or cost code.

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Displaying customer code and cost codes with entries

You use an Organizer section Preferences dialog box to display the customer codes and cost codes that are connected with entries in that section.

1. Depending on the section you are in, choose View - Calendar Preferences, View - To Do Preferences, View - Calls Preferences, or View - Anniversary Preferences.
2. Under "Show," select Cost code.
3. Click OK.

Tip Although you can assign a cost code to a Planner event, you can't display the customer codes and cost codes in Planner events.

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;',0)} See related topics

Renaming a customer code and cost code

1. Choose Create - Cost Codes.

2. Select the customer code you want to edit from the "Customer codes" list.
3. Under "Code," click anywhere on the name and make your edits.
4. Click Rename.
5. Select the cost code you want to edit from the "Cost codes" list.
6. Under "Cost," click anywhere in the cost and make your edits.
7. Click Rename.
8. Click OK.

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_CREATING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Overview: Filters

A filter lets you display a subset of your Organizer entries based on criteria you specify. You create filters based on text, numbers, dates, Organizer attributes (such as category or cost code) or any combination of these. For example, if you want to prepare a mailing list, you can use a filter to display only Address records for New York City; or if you want to create a status report, you can use a filter to display all Calls entries and To Do tasks that occurred before a specified date.

When you create a filter, you enter the section or sections to which you want to apply the filter along with the criteria. Only sections that you refer to in the filter are affected. For example, if you apply a filter for Address records for New York City, all other Organizer sections except Address continue to display all entries.

You can save the filters you create, and also add them to an Organizer menu, so you can quickly switch between a filtered view and a view of all entries.

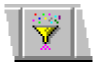
Organizer works the same way whether you are displaying all entries or a subset of entries. Any operation you can normally do in Organizer you can also do while a filter is in place. When you clear the filter, operations you performed while in the filtered view will also affect the entries that didn't display.

Note If you want to use filters in another user's mail file (that is, when you open another user's file or include a section from another user's file), the owner of the file must grant you Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile. See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Applying a filter

1. Choose View - Apply Filter.



2. Choose a filter from the list that appears.

   See details

Tip To see if there is currently a filter in place, choose View. If the Clear Filter command is dimmed, there is no filter in place.

Note If you want to apply a filter in another user's mail file (that is, when you open another user's file or include a section from another user's file), the owner of the file must grant you Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile. See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

{button ,AL(`H_APPLYING_A_FILTER_DETAILS',1)} See details

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Copying a filter

1. Choose Create - Filters.
2. Under "Filters," select a filter.
3. Click Copy.
4. For "Name," enter a new name for the filter.
5. (Optional) Edit any fields in the copied filter that you want to change.
6. (Optional) Select "Show in View - Apply Filter menu" if you want Organizer to display this filter when you choose View - Apply Filter.
7. Click OK.
8. If you want to apply the filter now, click Apply. If you don't want to apply the filter, click Close.

   Note If you want to apply a filter in another user's mail file (that is, when you open another user's file or include a section from another user's file), the owner of the file must grant you Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile. See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Creating a filter

1. Choose Create - Filters.
2. Click New.
3. For "Name," enter a name for the filter.
4. Click the "Section" box and select the Organizer section for which you want to set a filter.
5. Click the "Field" box and select the field against which you want to test.
6. Click the "Test" box and select the option for the way you want the filter to evaluate field entries.
7. If you are defining a filter based on text or numbers, under "Value," enter the text or numbers to define what the filter is basing its test on.

   You can also enter "True" or "False" under "Value."

   See details
8. (Optional) If you are going to add other criteria for the filter, click the "And/Or" box and select an option.
9. (Optional) If you want the name of the filter to appear in the View - Apply Filter menu, select "Show in View - Apply Filter menu."
10. Click OK.
11. (Optional) To enter additional filter criteria, move to the next row and repeat steps 4-10.
12. Select the filter you want to apply.
13. Click Apply, to apply the filter. If you don't want to apply the filter, click Close.

    Note If you want to apply a filter in another user's mail file (that is, when you open another user's file or include a section from another user's file), the owner of the file must grant you Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile. See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

{button ,AL(`H_CREATING_A_FILTER_DETAILS',1)} See details

{button ,AL(`H_ABOUT_FILTERS_OVER;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Editing a filter

1. Choose Create - Filters.
2. Under "Filters," select a filter.
3. Click Edit.
4. Edit the filter.

   See details
5. (Optional) Select "Show in View - Apply Filter menu" if you want Organizer to display the filter when you choose View - Apply Filter.
6. Click OK.
7. If you want to apply the filter now, click Apply. If you don't want to apply the filter, click Close.

   Note If you want to apply a filter in another user's mail file (that is, when you open another user's file or include a section from another user's file), the owner of the file must grant you Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile. See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

{button ,AL(`H_EDITING_A_FILTER_DETAILS',1)} See details

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Keyboard shortcuts

You can use the following keyboard shortcuts for Organizer functions and commands:

Action	Shortcut
Display business tab for a selected address.	Press CTRL+B
Copy selected text or a Notepad bitmap or metafile to Clipboard from the editing area.	Press CTRL+INS or CTRL+C
Dial a phone number.	Press CTRL+D
Edit the selected entry.	Press CTRL+E
Find text.	Press CTRL+F
Turn to specified information.	Press CTRL+G
Display Home tab for a selected address.	Press CTRL+H
Import information.	Press CTRL+I
Create an Organizer link.	Press CTRL+L
Open a file.	Press CTRL+O
Print information.	Press CTRL+P
Dial the phone number of the selected entry.	Press CTRL+Q
Go to today's date in the Calendar.	Press CTRL+T
Paste information from Clipboard.	Press SHIFT+INS or CTRL+V
Cut selected text to the Clipboard.	Press CTRL+X or SHIFT+DEL
Edit print layouts.	Press CTRL+Y
Undo your last action.	Press CTRL+Z
Retrieve the last deleted entry from Trash.	Press ALT+BACKSPACE or CTRL+Z

Display context-sensitive Help.	Press F1
Toggle bubble help on or off.	Press CTRL+F1
Confirm the current edits in a dialog box.	Press F2
Search for text.	Press F3
Turn on or off confidentiality for the current entry.	Press F4
Minimize Organizer on the desktop, and clear your Notes password; requires you to re-enter your password when you maximize Organizer.	Press F5
Set an alarm for the current entry.	Press F6
Specify that the current entry be a repeating entry.	Press F7
Assign a cost code to the current entry.	Press F8
Update all entries in an Organizer file (for example, if you're working in a file concurrently with other users); also checks for unread mail and sends any pending meeting notices.	Press F9
Turn Clean Screen on or off.	Press F11
Insert a new entry.	Press INS
Clear selected text or entries.	Press DEL
Close a dialog box; cancel the current operation. Also, when performing on-page edits on an entry, cancel the current edits.	Press ESC
Go to the previous page or, in the pop-up calendar, go back one month.	Press PGUP
Go to the previous section or,	Press CTRL+PGUP

in the pop-up calendar, go to the previous year.	
Go to the next page or, in the pop-up calendar, go forward one month.	Press PGDN
Go to the next section or, in the pop-up calendar, go to the next year.	Press CTRL+PGDN
Turn back to previous page.	Press CTRL+BACKSPACE
In a dialog box, display options for the current box.	Press ALT+↓
In a dialog box, clear box options.	Press ALT+
Fold a page.	Press ALT+←
Unfold a page.	Press ALT+→
Go to the last item currently displayed on the screen.	Press END
Go to the last item in the current section.	Press CTRL+END
Go to the first item currently displayed on the screen or, in the pop-up calendar, go to today's date.	Press HOME
Go to the first item in the current section.	Press CTRL+HOME

Mouse shortcuts

You can use the following mouse shortcuts for Organizer functions and commands

Action	Shortcut
Select an entry.	Click the entry.
Edit an entry.	Double-click the entry.
Create an entry.	Double-click the section page. You can also create an entry by clicking the section page or section tab with the right mouse button and choosing Create from the menu that appears.
Change preferences for a section.	Click the section tab with the right mouse button and choose the Preferences item from the menu that appears.
Change the view or sort order for a section.	Click the section page with the right mouse button and choose a view or sort order from the menu that appears.
Fold the current page in or out.	Click the section page with the right mouse button and choose Fold (In or Out).
Move an entry.	Drag and drop the entry.
Copy an entry.	Press and hold CTRL while you drag and drop the entry.
Create an entry and automatically link it to an existing entry.	Hold down SHIFT while you drag and drop the existing entry to the section tab for the new entry. The Create dialog box for the section appears with a link already set to the existing entry.
Turn back a page.	Click left page turner.
Turn forward a page.	Click right page turner.
Turn to the back cover of the notebook.	Click the back cover (right edge) of the notebook.
Turn to the front cover of the notebook.	Click the front cover (left edge) of the notebook.
Turn to the front of a section.	Click the section tab.

Turn to the back of a section.	Hold down SHIFT while you click the section tab.
Go to today's date in Calendar section.	Click today's date in Toolbox.
Add, rename, remove, include, or change the pictures for a section.	Click any section tab with the right mouse button and choose an item from the menu that appears.
Organizer Preferences, Filters, Categories, Cost Codes, Customize, Show Through, Hide SmartIcons, or Show Clean Screen.	Click the right edge or left edge of the notebook with the right mouse button and choose an item from the menu that appears.
Go back to the last page you were on.	Hold down CTRL while you click the section tab.
In a text editing area, insert the current time.	Hold down SHIFT while you click the clock.
In a text editing area, insert the current date.	Hold down SHIFT while you click today's date.

Overview: Notepad section

The Notepad section acts like an ordinary paper notepad; however, this electronic notepad helps you quickly organize the following kinds of information:

- Notes
- Lists
- Memos
- Spreadsheets
- Sales charts
- Diagrams
- Organizational charts
- Maps
- Logos

You can also do the following activities:

- Customize your document with rich text formatting, such as bold, italic, different fonts and font sizes, and so on.
- Add bitmaps, metafiles, and graphics.
- Create embedded and linked OLE objects.

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS;H_DELETING_A_NOTEPAD_PAGE_STEPS;H_EDITING_A_NOTEPAD_PAGE_STEPS;H_INSERTING_A_NOTEPAD_PAGE_STEPS;',0)} See related topics

Details: Changing preferences in Notepad

Changing your Notepad preferences
You can change any Notepad preferences as frequently as you want.

Sorting Notepad pages
You can change any Notepad preferences so that your Notepad information appears and functions the way you want. For example, let's say every Thursday you attend a marketing meeting during which you must summarize your accomplishments. To group together your accomplishments for the marketing meeting, you can sort your entries by category. Organizer will group together all similarly categorized entries.

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS',1)} Go to procedure

Changing preferences in Notepad

Notepad preferences determine how your entries appear and what information appears with them. Changing preferences is optional; if you don't change your Notepad preferences, Organizer uses the default preferences.

1. Go to the Notepad section and choose View - Notepad Preferences.

   See details
2. Under "View," select the appropriate options for how you want to sort Notepad pages.
3. Under "Show," select the appropriate options for what information you want to appear on your Notepad entries.
4. Under "Options," select the appropriate options.
5. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`;H_TURNING_TO_A_PAGE_IN_NOTEPAD_STEPS;H_SORTING_NOTEPAD_PAGES_STEPS;H_CREATING_CHAPTERS_STEPS;H_DELETING_A_NOTEPAD_PAGE_STEPS;H_EDITING_A_NOTEPAD_PAGE_STEPS;H_INSERTING_A_NOTEPAD_PAGE_STEPS;',0)} See related topics

Details: Creating chapters

Starting a chapter

You can start or create chapters in your Notepad section. "Start a chapter" assigns a new chapter to a Notepad page.

For example, let's say you are coordinating an upcoming event for the marketing group. To keep together ideas and information about the event, create a page, and select "Start a chapter" to mark that page as the beginning of your Marketing Event Information chapter. The page title will appear in bold on the Notepad Contents page, with any pages you create listed beneath it.

When you want to create pages that aren't related to the Marketing Event Information chapter, just create a new page with an appropriate title, and select "Start a chapter" to begin a different chapter. If you create pages that you later want to add to, or remove from, any chapter you've already created, just go to the Notepad Contents page, and drag and drop the page to the new location.

Tip Renumber your pages manually to change the order in which they appear in your Notepad section. For example, let's say you want page 8 to become page 3. From the Edit Page dialog box, under Page number, type the number 3 in the "Manual" box and click OK.

{button ,AL(`H_CREATING_CHAPTERS_STEPS',1)} Go to procedure

Creating chapters

You can create chapters within your Notepad section. Creating chapters is a useful way to group related information.

1. Create or edit a Notepad page.
2. Under "Style," select "Start a chapter."

   See details
3. Click OK.

Note Chapter pages appear in bold text on the Notepad Contents page.

{button ,AL(`H_CREATING_CHAPTERS_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_TURNING_TO_A_PAGE_IN_NOTEPAD_STEPS;H_MOVING_A_NOTEPAD_PAGE_STEPS;H_SORTING_NOTEPAD_PAGES_STEPS;',0)} See related topics

Customizing the appearance and function of your Notepad section

Option	Result
Start chapters	Places your Notepad page headings on the next page (default), on the left page, or on the right page.
Table of contents	Provides a Notepad Contents page in any of the following formats: "Full (default)," "None," "Chapters only," "Pages only."
Page numbering	Numbers pages as 1, 2, 3 (default); or as 1-1, 1-2, 1-3, and so on.
Show	Shows or doesn't show (default) a symbol indicating that you protected or assigned a category to your entry.
Turn to entry after Create/Edit	Goes (default) or doesn't go to where your Notepad information appears after you entered or edited the entry.

Note Under Options, you can select the following symbols to show information about Notepad page entries. Except for , these symbols appear with Notepad page entries, when appropriate.

Symbol	Result
	Indicates that an entry is confidential.
	Indicates that a category symbol appears with the Notepad entry. The symbol for the category you have specified appears with each entry.

Selecting the sort order of Notepad entries

Option	Result
Page number	Sorts (default) your Notepad pages numerically by page number.
Title	Sorts your Notepad pages alphabetically by page title, for example, fiscal budget, marketing expenses, research projects, and so on.
Date	Sorts your Notepad pages chronologically according to the date they were entered.
Category	Sorts your Notepad pages alphabetically by category, for example, business, finance, and so on.

Selecting what you see with your Notepad entries

Show options let you see a variety of information associated with each Notepad entry.

Option	Result
Title	Shows (default) or doesn't show the title of each page, for example, fiscal budget, marketing expenses, and so on.
Categories	Shows (default) or doesn't show the categories associated with each page entry, for example, business, finance, and so on.

Sorting Notepad pages

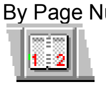
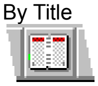
You must assign categories to your Notepad pages before you sort your Notepad pages by category.

1. Go to the Notepad section.
2. Choose View.
3. Choose one of the following commands: By Page Number, By Title, By Date, or By Category.

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_CREATING_CHAPTERS_STEPS',0)} See related topics

Sorting your Notepad pages

The Sort icons appear in Toolbox. You can click an icon instead of choosing the command.

Command	Result
By Page Number 	Sorts your Notepad pages numerically by page number (default).
By Title 	Sorts your Notepad pages alphabetically by page title, for example, fiscal budget, marketing expenses, research projects, and so on.
By Date 	Sorts your Notepad pages chronologically according to the date they were entered.
By Category 	Sorts your Notepad pages alphabetically by category, for example, finance, marketing, research projects, and so on.

Details: Turning to a page in Notepad

Turning to a Notepad page in other ways

You can also click  on any Notepad page to turn a Notepad page.

{button ,AL(`H_TURNING_TO_A_PAGE_IN_NOTEPAD_STEPS',1)} <u>Go to procedure</u>

Turning to a page in Notepad

1. Go to the Notepad section.
2. On the Notepad Contents page, double-click the page you want to go to.

{button ,AL(`H_TURNING_TO_A_PAGE_IN_NOTEPAD_DETAILS',1)} See details
{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_SORTING_NOTEPAD_PAGES_STEPS;H_CREATING_CHAPTERS_STEPS',0)} See related topics

Using the Contents page to move a Notepad page

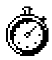
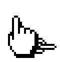
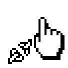
1. Click the Notepad tab to display the Contents page.
2. Choose View - By Page Number.
3. Click the title of the page you want to move.
4. Drag and drop the page in its new location in the listing on the Contents page.

   Tip You can also select the page then choose Edit - Cut, click where you want to place the page, then choose Edit - Paste.

{button ,AL(`;H_SORTING_NOTEPAD_PAGES_STEPS',0)} See related topics

Organizer mouse pointer shapes

While you are using Organizer, the mouse pointer can assume the following shapes:

Mouse pointer shapes	Action
	Shows mouse location.
	Selects, drags, or drops an entry. You click the Pointer icon from Toolbox.
 or 	Turns a page.
	Indicates that you can edit text or numbers.
	Indicates that you must wait while Organizer performs a function.
 or 	Indicates that you can create, move, copy, or delete an appointment.
 or 	Indicates that you can create, move, copy, or delete a To Do task.
 or 	Indicates that you can create, move, copy, or delete an Address record.
 or 	Indicates that you can create, move, copy, or delete a Calls entry.
 or 	Indicates that you can create, move, copy, or delete a Planner event.
 or 	Indicates that you can create, move, copy, or delete a Notepad page.
 or 	Indicates that you can create, move, copy, or delete an anniversary.
	Indicates that you can pick up an entry. You click the Pick up icon from Toolbox.
	Indicates that you can link the current entry. You click the Link icon from Toolbox.
	Indicates that you are linking an entry.
	Indicates that you can break a link. You click the Broken link icon from Toolbox.

Editing keys

You can use the following keys to move the I-beam ( ) or the insertion point (|), in boxes and other areas in which you can edit, such as Notepad text pages.

To move the insertion point	Press
Up or down one line	or ↓
Right or left one character	→ or ←
Right or left one word	CTRL+← or CTRL+→
To the beginning or end of the line	HOME or END
Up or down one screen	PGUP or PGDN
To the beginning or end of the text block	CTRL+HOME or CTRL+END

Shortcut menus

You can click the right mouse button to display shortcut menus for Organizer functions. If you click the right mouse button in a blank area of any Organizer page, you can perform the following functions. Remember, the commands on the menu may vary, depending on the section you're in.

To	Choose
Create an entry in the current section.	Create Appointment, Task, Address, Call, Event, Page, or Anniversary.
Paste Clipboard contents to a specified location.	Paste
Change the view for the current section.	For Calendar: Day per Page, Work Week, Week per Page, Month.
	For To Do: By Priority, By Status, By Start Date, By Category.
	For Address: All, Address, Contact, Phone, By Last Name, By Company, By Zip, By Category.
	For Calls: By Person, By Company, By Date, By Category; For Planner: Quarter per Page, Year per Page.
	For Notepad: By Page Number, By Title, By Date, By Category.
	For Anniversary: By Month, By Year, By Zodiac, By Category.
Fold the current page in or out.	Fold (In or Out)
Select preferences for the current section.	Calendar Preferences, To Do Preferences, Address Preferences, Calls Preferences, Planner Preferences, Notepad Preferences, Anniversary Preferences.

If you click the right mouse button while your mouse pointer is on a section divider, you can perform the following functions:

To	Choose
Create an entry in the current section.	Create Appointment, Create Task, Create Address, Create Call, Create Event, Create Page, or Create Anniversary.
Add a new section.	Add

Rename the current section.	Rename
Remove a section.	Remove
Include a section from another Organizer file to the current Organizer file.	Include
Add a picture to the current section tab.	Picture
Select preferences for the current section.	Calendar Preferences, To Do Preferences, Address Preferences, Call Preferences, Planner Preferences, Notepad Preferences, Anniversary Preferences.

If you click the right mouse button while your mouse pointer is on an entry, you can perform the following functions:

To	**Do this**
Cut the entry to Clipboard.	Cut
Copy the entry to Clipboard.	Copy
Paste Clipboard contents to a specified location.	Paste
Delete the entry.	Clear
Make changes to the entry.	Edit Appointment, Edit Task, Edit Address, Edit Call, Edit Event, Edit Page, Edit Anniversary.
Add, delete, or change the category for the entry.	Categorize
Set an alarm for the entry.	Alarm
Set an entry to repeat.	Repeat
Set a cost code entry.	Cost
Determine if the entry conflicts with a previously scheduled entry.	Warn Of Conflicts
Pencil in the selected entry.	Pencil In
Mark the entry as confidential.	Confidential

Overview: Planner section

Planner helps you schedule and prepare for events that take place all day or for more than one day. With Planner, you can do the following activities:

- Designate blocks of time for a particular activity, such as a vacation, an off-site meeting, or a conference.
- View events by year or by quarter.
- Specify that your events show through into the Calendar section, so you can see your upcoming commitments in the context of your daily work.
- Show through Planner events in the calendar section, and show through Calendar appointments in the Planner section.

Planner looks like a wall chart where you can mark events, tasks, or milestones with color blocks or strips. The months of the year are on the left, the days of the week are across the top, and the years are on the right side. If you want to look at the Planner schedule for a different year, click that year tab.

At the bottom of the page, Planner provides a color key with event types, for example, Vacation, Meeting, or Trade Show. You can customize the Planner key descriptions by changing the words to suit your needs.

When you move the mouse pointer in Planner, the date your pointer is on appears in the box just below the Planner chart in the long rectangular box. If you created an event, the event type and the first line of Notes text appears with the date.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPSH_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS',0)} See related topics

Details: Changing preferences in Planner

Editing the Planner key in other ways
You can also edit the Planner key by double-clicking anywhere in the Planner key.

Folding or unfolding the Planner page
If you unfold or fold the Planner wall chart by clicking the unfold  or fold  icons, only a portion of the Planner wall chart appears on a single page. You can also choose View - Fold Out to unfold the page.

Changing your Planner preferences
You can change any Planner preferences so that your Planner information appears and functions the way you want. You can also change Planner preferences as frequently as you want.

Planner uses page tabs to group information within the section. The tabs you see depend on the view you choose.

If you select "Quarter," Organizer displays tabs with quarter names, for example Q1 1995, and also includes tabs for the previous and next year. If you select "Year," Organizer displays year tabs and also includes tabs for the previous and next decade.

{button ,AL(`H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',1)} Go to procedure

Changing preferences in Planner

Planner preferences determine how your events appear and what information appears with them. Changing preferences is optional; if you don't change your Planner preferences, Organizer uses the default preferences.

1. Go to the Planner section and choose View - Planner Preferences.
2. Under "View," select the option for what you want to appear with your Planner events.
3. Under "Options," select the appropriate options you want to appear with your Planner events.
4. (Optional) If you want to edit the Planner key, click Key.
5. Under "Key names," select a Planner key to change, enter the changes you want to make, and click OK.
   See details
6. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_PLANNER_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;',0)} See related topics

Changing the view of Planner events

1. Go to the Planner section.
2. Choose View.
3. Choose the Quarter per Page or Year per Page command.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Customizing the appearance of your Planner section

Option	Result
Days start at	Lets you specify the time at which days in Planner begin (for when you are showing through Calendar entries). The default is 8:00 AM.
Days end at	Lets you specify the time at which days in Planner end (for when you are showing through Calendar entries). The default is 6:00 PM.
Show key	Shows (default) or doesn't show the Planner key at the bottom of the Planner wall chart.
Automatically unfold	Shows (default) or doesn't show Planner unfolded over two pages.
Turn to entry after Create/Edit	Goes or doesn't go (default) to the page your event is on after you create or edit an event.

Details: Deleting a Planner event

Keyboard shortcuts
You can also select an event and then press CTRL+X or DEL to delete a Planner event.

Deleting a Planner event in other ways
You can also delete a Planner event by selecting the event and pressing DEL.

{button ,AL(`H_DELETING_A_PLANNER_EVENT_STEPS',1)} Go to procedure
{button ,AL(`;H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS',0)} See related topics

Deleting a Planner event

1. Select the Planner event you want to delete.
2. Drag and drop the event to

 in Toolbox.

Note To retrieve a deleted Planner event, choose Edit - Undo Event Delete before you do any other action. You can only undo the last action.

{button ,AL(`H_DELETING_A_PLANNER_EVENT_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Editing a Planner event

1. Double-click the Planner event.
2. Edit the Planner event.

   See details

Tip Press TAB to move between options in an Edit Event dialog box.

3. Click OK to enter your changes.

{button ,AL(`H_EDITING_A_PLANNER_EVENT_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Details: Editing the Planner key names

Editing the Planner key names in other ways
You can also double-click on the Planner key that you wish to edit. This will bring up the Planner Key dialog box.

Reviewing the number of days for each event type
You can move the mouse pointer over an event type in the Planner key and Organizer displays the number of days you committed to that activity for the current year or quarter (depending on the view option you selected) in the box that appears above the Planner key.

{button ,AL(`H_EDITING_THE_PLANNER_KEY_STEPS',1)} Go to procedure

Editing the Planner key names

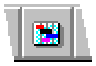
1. Select View - Planner Preferences.
2. Click Key.
3. Click or highlight the text in any of the Planner keys and enter the changes you want to make to the Planner key name.
4. Click OK.

{button ,AL(`H_EDITING_THE_PLANNER_KEY_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Creating a Planner event

1. Go to the Planner section and double-click the Planner page.



2. Click the "Event type" box to select an event type from the list that appears.

   See details

3. (Optional) Under "Rows," click + (plus) to increase or - (minus) to decrease the row in the Planner day in which you want the event to appear.

   See details

4. (Optional) Under "Notes," enter additional information about the event.
5. Click the "From" and "Until" boxes to select the start date and end date of the event. (Under "Days," you can also click + (plus) to increase, and - (minus) to decrease the duration of the event.)

   See details

6. (Optional) Select the appropriate options for the event: "Categories," or "Confidential."
7. Click OK.

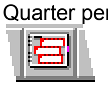
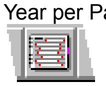
Tip To create additional Planner events, click Add before you click OK. When you finish entering all your Planner events, click OK.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_DETAILS',1)} See details

{button ,AL(`H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',0)} See related topics

Selecting the Planner view

The view icons below appear in Toolbox. Click one instead of using the command.

Command	Result
Quarter per Page 	Displays three months at a time.
Year per Page 	Displays a year at a time (default).

Details: Showing Planner events in Calendar

Editing a Planner event in Calendar

If you want to edit a Planner event and you are in the Calendar section, double-click the Planner event. The Edit Event dialog box appears. Make your changes and click OK.

Rescheduling a Planner event in Calendar

If you want to reschedule a Planner event and you're in the Calendar section, you can drag and drop the Planner event to any of the days that appear on your current pages. If you want to reschedule a Planner event to a day on another page, click in Toolbox, select the Planner event, position it on the day you want and click.

Showing entries while displaying time slots in Day per Page view

If you're using the Day per Page view with time slots, the entries you show through in Calendar don't scroll out of view as you scroll through the day's appointments; that is, the show-through entries stay either above or below the time slots.

Organizer blocks out an area at the top or bottom of your appointments for entries you show through in Calendar. You can expand or shrink this block by dragging the solid box in the bottom right corner. The new size of this area affects all pages in the Day per Page view.

You can also drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

- New size to use the size you dragged for all pages.
- Temporary size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16, the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

{button ,AL(`H_SHOWING_PLANNER_EVENTS_IN_CALENDAR_STEPS',1)} Go to procedure

Showing Planner events in Calendar

By default, Organizer shows entries from To Do, Calls, Planner, and Anniversary sections on the appropriate day in Calendar. Showing entries from other sections can help you see your upcoming commitments in the contents of your daily work, for example, you can see any Planner events you entered along with your appointments. You can change the way your events appear in Calendar, and if you don't want to display your events in Calendar, you can turn off show through.

1. Choose Section - Show Through.

2. Click the "Show into" box to select Calendar as the section to show into.
3. (Optional) Under "From," deselect "Planner" if you don't want your events to appear in Calendar.

   Note If you want to redisplay your events in Calendar, select "Planner" again.
4. (Optional) Click Preferences and select options for whether Planner events appear above or below appointments and how much of the event's description to show in Calendar. Click OK to confirm your preferences.
5. Click OK.

Tip To print shown-through items, use any of the following print layouts: "Monthly Calendar," "Daily Page," or "Weekly 2-Page."

{button ,AL(`H_SHOWING_PLANNER_EVENTS_IN_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Overview: SmartIcons

SmartIcons automate Organizer menu commands and provide shortcuts for other functions. To use SmartIcons, position your mouse pointer on the icon and click the left mouse button. To find out the function of an icon, move the mouse pointer to the icon. Bubble help for the icon appears. (To turn bubble help off or on, choose Help - Bubble Help.)

When you first start Organizer, certain SmartIcons appear across the top of the screen. You can customize the set of SmartIcons by adding the ones you use most often and removing the ones you don't use. You can also change the position of the SmartIcons so they appear across the bottom of the screen, to either side, or float around your screen when you move them with the mouse.

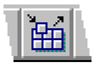
Organizer has Toolbox icons that appear on the left side of the screen. Toolbox icons provide extra tools for performing and automating Organizer specific tasks.

{button ,AL(`H_ADDING_AN_ICON_TO_THE_DEFAULT_PALETTE_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_CREATING_AN_ICON_SET_STEPS;H_DELETING_AN_ICON_SET_STEPS;H_EDITING_AN_ICON_STEPS;',0)} See related topics

Adding an icon to the default set of SmartIcons

When you initially start Organizer, a set of SmartIcons appears across the top of the screen; these are the default SmartIcons. You can customize your set of SmartIcons by adding those icons you'll use most often.

1. Choose File - User Setup - SmartIcons Setup.



2. Under "Available icons (drag to add)," use the scroll bar to view the entire SmartIcons list.
3. Drag any icon from the "Available icons (drag to add)" box to the set of SmartIcons at the top of the dialog box.

Tip To change the order of your icons, drag and drop them to the position you want.

4. Click OK.

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_EDITING_AN_ICON_STEPS;',0)} See related topics

Details: Attaching a script to an icon

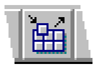
Selecting a script or executable file
You can find a script or executable file in the following ways: Click the "Look in" box to select the path where the script or executable file is located. For" File name," enter the name of the script or executable file. Click the "Files of type" box to select the type of file you want.

{button ,AL(`H_ATTACHING_A_SCRIPT_TO_AN_ICON_STEPS',1)} Go to procedure

Attaching a script to an icon

You can associate a script or an executable file (such as a .BAT or .EXE file) to start an application with a customized icon only. You can't associate a script or an executable file to a standard Organizer icon that you didn't customize to do so.

1. Choose File - User Setup - SmartIcons Setup.



2. Click Edit Icon.
3. Scroll through the "Available icons you can edit or copy" box, and select the icon you want to attach a script to.
4. Click Attach Script and select a script or executable file to attach.

   See details
5. Click Open.
6. Click Save.
7. Click Done.

{button ,AL(`H_ATTACHING_A_SCRIPT_TO_AN_ICON_DETAILS',1)} See details

{button ,AL(`H_EDITING_AN_ICON_STEPS;H_LAUNCHING_ANOTHER_APPLICATION_FROM_ORGANIZER_STEPS',0)} See related topics

Details: Changing the set of SmartIcons you want to display

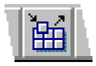
Using "Bar is enabled to display during its context"

When you define that a set of SmartIcons will appear for a specific context—such as when you're editing a Notepad page—select "Bar is enabled to display during its context." This option works in conjunction with your selection to control which set of SmartIcons appears when you edit Notepad pages.

{button ,AL(`H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS',1)} Go to procedure

Changing the set of SmartIcons you want to display

1. Choose File - User Setup - SmartIcons Setup.



2. Click the "Bar name" box and select the set of SmartIcons you want to display.
3. Click the "Bar can be displayed when context is" box and select the appropriate option.
4. If you want the selected set of SmartIcons to display at specific times, select "Bar is enabled to display during its context."

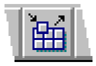
   See details
5. Click OK.

{button ,AL(`H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_DETAILS',1)} See details

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_ADDING_AN_ICON_TO_THE_DEFAULT_PALETTE_STEPS;H_EDITING_AN_ICON_STEPS;H_CHANGING_THE_SIZE_OF_AN_ICON_STEPS;',0)} See related topics

Changing the size of an icon

1. Choose File - User Setup - SmartIcons Setup.



2. Under "SmartIcons preferences," click the "Icon size" box.
3. Select the appropriate option.
4. Click OK.

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_EDITING_AN_ICON_STEPS;',0)} See related topics

Details: Creating a set of SmartIcons

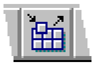
Using "Bar is enabled to display during its context"
When you define that a set of SmartIcons will appear for a specific context—such as when you're editing a Notepad page—select "Bar is enabled to display during its context." This option works in conjunction with your selection to control which set of SmartIcons appears when you edit Notepad pages.

{button ,AL(`H_CREATING_AN_ICON_SET_STEPS',1)} Go to procedure

Creating a set of SmartIcons

You can create a new set of SmartIcons by customizing your current set and then saving the new set of SmartIcons to another name. If you modify a selected set and save it to another name, only the new set contains the changes. The old set of SmartIcons remains unchanged. If you don't modify the selected set and save it to another name, the new set becomes a copy of the original set.

1. Choose File - User Setup - SmartIcons Setup.



2. Click the "Bar name" box and select the set of SmartIcons you want to base the new set on.
3. Add, move, group, or remove SmartIcons until the set of SmartIcons is the way you want.
4. Click Save Set.
5. Click Save As New to save the new SmartIcons set to another name.
6. For "SmartIcons bar name," enter the name you want for the new set of SmartIcons.

   If necessary, click Browse and select the path to which you'll save the new set of SmartIcons file.
7. For "SmartIcons file name," enter the file name you want for the new set of SmartIcons.
8. Click OK to return to the SmartIcons Setup dialog box.
9. Click the "Bar can be displayed when context is" box and select the appropriate option.
10. If you want the selected set of SmartIcons to display at specific times, select "Bar is enabled to display during its context."

    See details
11. Click OK.

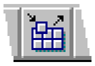
    The name of the new set of SmartIcons appears in the "Bar name" box.

{button ,AL(`H_CREATING_AN_ICON_SET_DETAILS',1)} See details

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_ADDING_AN_ICON_TO_THE_DEFAULT_PALETTE_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_EDITING_AN_ICON_STEPS;H_CHANGING_THE_SIZE_OF_AN_ICON_STEPS;',0)} See related topics

Deleting a set of SmartIcons

1. Choose File - User Setup - SmartIcons Setup.



2. Click Delete Set.
3. For "Bar(s) of SmartIcons to delete," select the set of SmartIcons you want to delete.
4. Click OK.
5. Click Yes to confirm the deletion.
6. Click OK.

Caution If you delete a set of SmartIcons, you can't undo the deletion.

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_EDITING_AN_ICON_STEPS;H_CREATING_AN_ICON_SET_STEPS;',0)} See related topics

Displaying SmartIcons

Option	Result
Always	Displays the selected set of SmartIcons at all times in all Organizer sections.
Notepad page edit	Displays the selected set of SmartIcons when editing Notepad pages only.

Details: Editing an existing icon

Editing your icons
You can customize icons to look and behave the way you want them to. For example, let's say you want to start an application or a macro with a customized icon or want to attach a script to a customized icon. Simply edit an existing icon, save it with a name you specify, and follow the appropriate steps to associate the icon the way you want to.

{button ,AL(`H_EDITING_AN_ICON_STEPS',1)} Go to procedure

Editing an existing icon

To edit an existing icon, first copy a standard Organizer icon from the "Available icons (drag to add)" box and rename it. When you've done this, you can edit the new custom icon any way you want.

1. Choose File - User Setup - SmartIcons Setup.

2. Click Edit Icon.
3. From the "Available icons you can edit or copy" box, select the icon you want to edit.
4. Select the mouse button colors boxes for "Left" and "Right" and select colors and make changes to the icon.
5. (Optional) For "Description," enter a description of the icon that will appear next to your icon and what appears as a description when you use bubble help.
6. Click Done when you're done editing the icon.
7. Click Yes to save your changes.

   The Save As dialog box appears.
8. For "File name," type the name you want to give the edited icon.
9. Click Save.
10. Click OK.

{button ,AL(`H_EDITING_AN_ICON_DETAILS',1)} See details

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_CHANGING_THE_SIZE_OF_AN_ICON_STEPS;H_ATTACHING_A_SCRIPT_TO_AN_ICON_STEPS',0)} See related topics

Hiding a set of SmartIcons

1. Click  (the drop-down arrow) located in the top left corner of the SmartIcons bar.
2. Select the appropriate command.

{button ,AL(`H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_SHOWING_A_HIDDEN_SET_OF_SMARTICONS_STEPS',0)} See related topics

Hiding a set of SmartIcons

Option	Result
Hide this bar of SmartIcons	Hides the set of SmartIcons that is marked with a check at the bottom of the menu, for example, Universal.
Hide all SmartIcons	Hides all sets of SmartIcons available to you in Organizer.
SmartIcons Setup	Opens the SmartIcons Setup dialog box.

Note The last two items in the menu are the last sets of SmartIcons you selected to display.

Selecting an icon

To use SmartIcons, position your mouse pointer on an icon and click the left mouse button.

Tip To find out the function of an icon, move the mouse pointer to the icon. A short description in a bubble, called bubble help, appears for each icon.

{button ,AL(`H_EDITING_AN_ICON_STEPS;H_CHANGING_THE_SIZE_OF_AN_ICON_STEPS;H_ADDING_AN_ICON_TO_THE_DEFAULT_PALETTE_STEPS',0)} See related topics

Selecting Attach Script options

Option	Result
Run a Script (*.lss)	Attaches a LotusScript file (.LSS) to a custom icon to run a script.
Run an application (*.bat, *.com, *.exe, *.pif)	Attaches an executable program file, such as a .BAT or .EXE, to a custom icon to start an application.

Selecting the size of your icons

Option	Result
Regular	Displays default size icons.
Large	Displays icons approximately twice the size of default size icons.

Details: Showing a hidden set of SmartIcons

Using "Bar is enabled to display during its context"
When you hide a set of SmartIcons, this option is disabled. When you select "Bar is enabled to display during its context," after hiding a set of SmartIcons, you redisplay the set of SmartIcons.

{button ,AL(`H_SHOWING_A_HIDDEN_SET_OF_SMARTICONS_STEPS',1)} Go to procedure

Showing a hidden set of SmartIcons

If you have hidden your set of SmartIcons, follow the procedure below to display them again.

1. Choose File - User Setup - SmartIcons Setup.
2. Click the "Bar name" box and select the set of SmartIcons you want to display.
3. Click the "Bar can be displayed when context is" box and select the appropriate option.
4. Select "Bar is enabled to display during its context."

   See details
5. Click OK.

{button ,AL(`H_SHOWING_A_HIDDEN_SET_OF_SMARTICONS_DETAILS',1)} See details

{button ,AL(`H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_HIDING_A_SET_OF_SMARTICONS_STEPS',0)} See related topics

Address menu
The Address menu appears when you're in the Address section.

Categorize
Assigns a category to an Address record.

Business
Displays the business address in the foreground.

Home
Displays the home address in the foreground.

Change Envelope/Label Format
Lets you select a different envelope and/or label format for a country.

Confidential
Makes an Address record confidential, so others who can access your files can't view it.

{button ,AL(`;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS',0)} See related topics

Anniversary menu
The Anniversary menu appears when you're in the Anniversary section.

Categorize
Assigns a category to an anniversary. See also Assigning a category to an entry.

Alarm
Assigns an alarm to an anniversary. See also Setting alarms for an entry.

Repeat
Creates a repeating anniversary. See also Creating a repeating entry.

Cost
Assigns a cost code to an anniversary. See also Assigning a customer code and cost code to an entry.

Occurs Every Year
Enters the anniversary on the same date every year after the year in which you created it.

Confidential
Makes an anniversary confidential, so others who can access your files can't view it.

Call menu

The Call menu appears when you're in the Calls section.

Categorize

Assigns a category to a Calls entry. See also Assigning a category to an entry.

Alarm

Assigns an alarm to a Calls entry. See also Setting alarms for an entry.

Repeat

Creates a repeating Calls entry. See also Creating a repeating entry.

Cost

Assigns a cost code to a Calls entry. See also Assigning a customer code and cost code to an entry.

Follow Up

Creates a follow-up Calls entry. See also Creating a follow-up Calls entry.

Completed

Marks a Calls entry completed.

Confidential

Makes a Calls entry confidential, so others who can access your files can't view it.

Create menu

Appointment, Task, Address, Call, Event, Page, Anniversary
Depending on the section you're in, creates the appropriate entry in the section.

Entry In
Creates an entry in a section you specify. See also Creating an entry.

Organizer Link
Links selected entries. See also Creating links.

File Link
Creates a link to run a file. See also Linking to a file or application.

Internet Link
Create a link to an Uniform Resource Locator (URL) on the Internet. See also Linking to a URL on the Internet.

Filters
Creates and edits filters. See also Creating a filter.

Categories
Creates and edits categories. See also Creating a new category.

Cost Codes
Creates and edits cost codes. See also Creating a customer code and cost code.

Object
Creates an OLE object on a selected Notepad page. See also Creating a new OLE object in Notepad, Creating an OLE object in Notepad from part of a file, and Creating an OLE object in Notepad from an entire file.

Edit menu

Undo
Undoes your last action. See also Undoing your last action.

Cut
Cuts information and places it on Clipboard.

Copy
Copies information to Clipboard. See also Copying text and Copying a single entry.

Paste
Pastes information from Clipboard. See also Copying text and Copying a single entry.

Clear
Deletes information without placing it on Clipboard.

Copy Special
Copies selected fields from entries. See also Copying Organizer field information to use in other applications.

Paste Special
Selects the format for information you want to paste. See also Pasting text from other applications in Organizer.

Edit (Appointment, Task, Address, Call, Event, Page, Anniversary)
Edits an entry for the current section. This command changes depending on the section in which you are editing an entry.

Organizer Links
Edits information links. See also Changing the order of a link.

Go To
Turns to specified information. See Moving between sections and Moving to a specific date.

Find
Searches for text you specify. See also Finding text.

Layouts
Sets layout options. See also Selecting individual layout print options.

OLE Links
Edits, breaks, or updates embedded objects and linked objects. See also Editing a linked object in Notepad, Breaking an object link in Notepad, and Changing how to update linked objects in Notepad.

Event menu

The Event menu appears when you're in the Planner section.

Categorize

Assigns a category to an event. See also Assigning a category to an entry.

Alarm

Assigns an alarm to an event. See also Setting alarms for an entry.

Repeat

Creates a repeating event. See also Creating a repeating entry.

Cost

Assigns a cost code to an event. See also Assigning a customer code and cost code to an entry.

Confidential

Makes an event confidential, so others who can access your files can't view it.

Help menu
For more information on using Help to learn about Organizer, choose Overview: Using Help to learn about Organizer from Help Contents.

Help Topics
Displays Help Contents, Index, and Find dialog box.

Bubble Help
Toggles bubble help on or off.

Lotus Internet Support
Displays the Lotus Internet Support items.

Tour
Starts the Organizer Tour.

About Lotus Organizer
Displays release and copyright information.

Page menu
The Page menu appears when you're in the Notepad section.

Categorize
Assigns a category to a Notepad page. See also Assigning a category to an entry.

Page
Sets style attributes for Notepad pages. See also Linking Notepad pages, Folding Notepad pages, and Assigning color to Notepad pages.

Confidential
Makes a Notepad page confidential, so others who can access your files can't view it.

Phone menu

Dial
Dials a number. See also Dialing a number.

Quick Dial
Dials the number of the current entry. See also Dialing a number quickly.

Incoming Call
Lets you log an incoming call. See also Creating a Calls entry for incoming calls.

Section menu

Customize
Customizes a section.

Show Through
Shows information from other sections. See also Displaying entries in more than one section.

Include
Includes a section. See also Including sections from other Organizer files.

Turn To
Turns to a section. See also Moving between sections.

Task menu
The Task menu appears when you're in the To Do section.

Categorize
Assigns a category to a task. See also Assigning a category to an entry.

Alarm
Assigns an alarm to a task. See also Setting alarms for an entry.

Repeat
Creates a repeating task. See also Creating a repeating entry.

Cost
Assigns a cost code to a task. See also Assigning a customer code and cost code to an entry.

Completed
Marks a task as completed. See also Marking a To Do task completed.

Confidential
Makes a task confidential, so others who can access your files can't view it.

View menu

The commands in the View menu change depending on the section you're in. For information on the View commands and how they affect the way you can view information in individual sections, see Changing the Calendar view, Sorting To Do tasks, Changing the sort order of Calls entries, Changing the view of Planner events, Sorting addresses, Sorting Notepad pages, and Sorting anniversaries.

The following commands are common to all sections:

Multiple Calendars

If checked, displays more than one calendar in the Calendar view if you have more than one Calendar section in your Organizer file. See also Overview: Working with multiple calendars.

Add Calendar

Adds a calendar to multiple calendar view. See also Adding a calendar to multiple calendar view.

Remove Calendar

Removes a calendar from multiple calendar view. See also Removing a calendar from multiple calendar view.

Show Clean Screen

If checked, clears the screen of Windows controls, including the title bar, menu, SmartIcons, and vertical and horizontal scroll bars so that you have the whole screen in which to view and edit your desktop. See also Using Clean Screen.

Fold (In or Out)

Folds the current page in or out.

Apply Filter

Applies a filter for entries. See also Applying a filter.

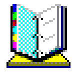
Clear Filter

Clears the current filter. See also Clearing a filter.

Preferences

This command changes depending on the section you're in, for example, Calendar Preferences, To Do Preferences, Address Preferences, and so on. It lets you set the preferences for the particular Organizer section you're in.

Control menu

The Control menu appears when you click  in the title bar.

Restore
Restores the window to its former size after you have enlarged (maximized) it or reduced (minimized) it to an icon.

Move
Moves the window to another position by using the keyboard.

Size
Changes the size of the window by using the keyboard.

Minimize
Reduces the window to an icon.

Maximize or Reduce
Enlarges the window to its maximum size or reduces an enlarged window.

Close
Closes the window.

Overview: Commands

A Command is what lets you perform an Organizer function. Commands appear on the menu bar and in pull-down menus. Some main menus and pull-down menus change depending on what Organizer section you're in. For example, when you're in the Calendar section of Organizer, the Appointment menu will appear.

There are conventions that apply to all commands under all the pull-down menus in every section of Organizer:

- If a command is dimmed, it isn't available for the Organizer section you're in or, in one case, it isn't available in Organizer 97 GS (Meeting Notices in the File pull-down menu.)
- If a command is followed by an ... (ellipsis), a dialog box will appear when you choose the command.
- If a command is followed by ▸ (arrow), another cascading menu will appear when you choose the command.

Text Menu
The Text Menu appears when you're in the Notepad section.

Character
Assigns attributes of bold, italic, underline, or strikethrough to Notepad page text. See also Customizing text attributes.

Font
Assigns different fonts and attributes to Notepad page text. See also Customizing fonts.

Bullet Style
Assigns bullets to Notepad page text. See also Customizing with bulleted text.

Alignment
Aligns Notepad page text left, right, or center. See also Customizing alignment.

Paragraph
Indents Notepad page paragraphs. See also Customizing paragraph settings.

Tabs
Sets and clears tab stops for positioning Notepad page paragraphs on the Notepad page. See also Customizing tab settings.

Word Wrap
Wraps text within the margins of the Notepad page. See also Customizing how text wraps.

Appointment menu

The Appointment menu appears when you're in the Calendar section.

Alarm

Assigns an alarm to an appointment. See also Setting alarms for an entry.

Repeat

Creates a repeating appointment. See also Creating a repeating entry.

Cost

Assigns a cost code to an appointment. See also Assigning a customer code and cost code to an entry.

Invite

Lets you invite other users to the currently selected appointment. See also Scheduling a meeting**.**

Status

Displays meeting information and lets you make changes to the currently selected meeting. See also Tracking responses to invitations.

Warn Of Conflicts

Lets you select whether Organizer displays notification of time conflicts. See also Resolving conflicting appointments.

Pencil In

Makes the current appointment tentative. See also Penciling in an appointment.

Confidential

Makes the current appointment confidential, so others who can access your files can't view it.

File menu

Open
Opens an existing file. See also Opening an Organizer file by user name or Opening an Organizer file by database name.

Import
Imports information from another application or file format. See also Importing an entry.

Export
Exports information to another application or file format. See also Exporting an entry.

Meeting Notices
Lets you view meeting notices.

Replication Conflicts
Lets you view replication conflicts.

TeamMail
Allows you to create a message and distribute it to one or more people with your electronic mail system. See also Sending mail using TeamMail.

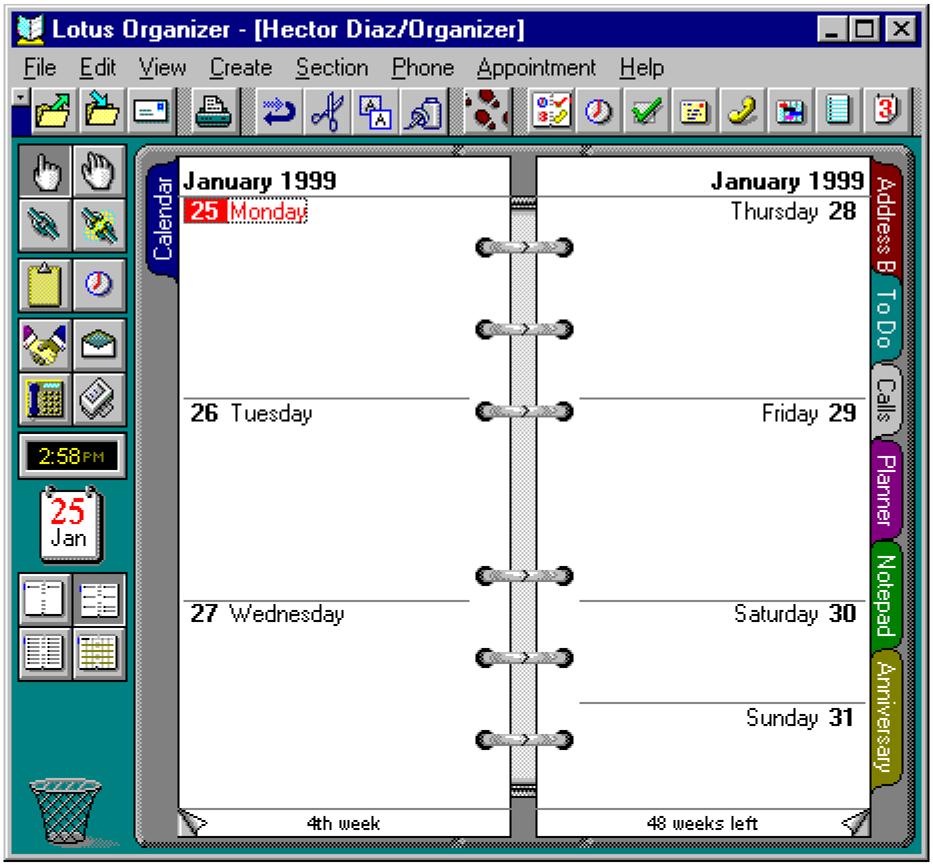
Print
Prints information. See Printing information in any Organizer section.

User Setup
Sets Organizer preferences.

Exit Organizer
Ends your Organizer session. See also Ending Organizer.

The Organizer workspace

This illustration shows the Organizer workspace. To see information about an area of the screen, click the area. A dotted outline around a part of the workspace indicates general information is available for that area when you click the area inside the dotted outline.



Title bar
Contains the Windows control menu, the program name, the Minimize button, the Maximize or Reduce button, and the Close button.

Organizer also displays the user name of the file in which you're working in the title bar after the program name, for example

[Hector Diaz/Organizer].

Overview: To Do section

The To Do section helps you keep track of what you want to do and when you must do it. With the To Do section, you can do the following activities:

- Enter To Do tasks.
- Group To Do tasks by category.
- Prioritize To Do tasks by importance.
- Group To Do tasks by status.
- Sort To Do tasks by start date, due date, or completion date.
- Show through To Do tasks in the Calendar section so you can see all of your tasks in your Calendar.
- Track projects, ideas, and status report entries.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Details: Changing preferences in To Do

Changing your To Do preferences
You can change any To Do preferences so that your To Do information appears and functions the way you want. You can also change To Do preferences as frequently as you want.

Sorting your To Do tasks
For example, let's say every Thursday you attend a marketing meeting during which you must summarize what you've accomplished. Before you attend the meeting, you can sort your To Do information in the way most helpful for you. To group together your marketing-related To Do tasks, you can sort To Do tasks by category. To ensure all your To Do tasks for the week are completed, you can sort To Do tasks by status.

How changing views affect To Do tabs
To Do uses page tabs to group information within the section.

For example, you can use 1, 2, 3, and None for Priority; Overdue, Current, Future, and Completed for Status; you can use an alphabetical A - Z scheme for categories; and you can use dates, either by start dates or due dates, as your tabs.

How Completed To Do tasks appear
Depending on the selections you make to your To Do Preferences options, your completed To Do tasks appear and function differently. For example, you can show completed To Do tasks with a strikethrough line, and you can automatically delete completed To Do tasks.

Showing completed To Do tasks with and without a strikethrough line
Under "Options," select "Strikethrough" to show completed To Do tasks with a strikethrough line. If you don't select "Strikethrough," your completed To Do tasks appear without a strikethrough line through them.

Automatically deleting completed To Do tasks
Under "Options," you can choose to have your completed To Do tasks automatically deleted. When you select "Delete task when completed," your To Do tasks automatically disappear from your To Do section when they are completed.

Understanding how text color changes with the status of To Do tasks
If you select "Show completed tasks," your To Do tasks will move automatically to the Completed page or to the Completed heading. The color of the To Do task text changes when To Do tasks are marked Completed.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS',1)} Go to procedure

Changing preferences in To Do

To Do preferences determine how your To Do task entries are sorted and what information appears with them. Changing preferences is optional; if you don't change your To Do preferences, Organizer uses the default preferences.

1. Go to the To Do section and choose View - To Do Preferences.

   See details
2. Under "View," select the appropriate option for how you want to sort To Do pages.
3. Under "Show," select the appropriate options for what you want to appear with your To Do tasks.
4. Under "Options," select the appropriate options.
5. Under "Status color," select the color to represent the status of the To Do tasks you enter.
6. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Changing the status color of To Do tasks

1. Go to the To Do section and choose View - To Do Preferences.
2. Under "Status color," click the box for each of the default status colors you want to change.

   For example, if you want to change the default status color for "Overdue," click the "Overdue" box.
3. Select a new status color.
4. When you finish selecting the status colors you want, click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;',0)} See related topics

Details: Deleting a To Do task

Keyboard shortcuts
You can also select a To Do task and then press CTRL+X or DEL to delete a To Do task.

Deleting a To Do task in other ways
You can also select a To Do task and choose Edit - Cut or click to delete a To Do task.

{button ,AL(`H_DELETING_A_TO_DO_TASK_STEPS',1)} Go to procedure
{button ,AL(`;H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS',0)} See related topics

Deleting a To Do task

1. Select the To Do task you want to delete.
2. Drag and drop the To Do task to  in Toolbox.

Note To retrieve a deleted To Do task, choose Edit - Undo Task Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_A_TO_DO_TASK_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Details: Editing a To Do task

Keyboard shortcuts
You can also select a To Do task and press CTRL+E or press SHIFT+ENTER to edit the task description directly.

Editing To Do tasks in other ways
You can also select a To Do task and choose Edit - Edit Task to edit a To Do task.

Changing the description
Under "Description," edit the description of the selected To Do task by entering the appropriate text.

For example, let's say that the description of your To Do task was: Meet with Mary about trip. Perhaps you've received information from your travel agent and you want the To Do task description to be more specific. Change the description to: Meet with Mary to go through trip itinerary and car rental reservations.

Changing the start and due dates
Under "Date," select a start or due date by clicking the "Start" or "Due" box. When the calendar appears, select a new date.

For example, if you assign a To Do task a due date of October 14, but you were given a three-day extension, click the "Due" box. When the calendar appears, select "October 17."

Changing a category
Click the "Categories" box to select the category you want associated with the To Do task.

For example, if you assign a To Do task the "Sales" category but you decide it should be changed to the "Finance" category, click the "Category" box and select "Finance."

Changing a priority
Select the priority you want to assign your To Do task.

For example, if your manager wants a report written by tomorrow, assign that To Do task a priority of "1." If you were given a week extension, select "Priority" and assign the To Do task an appropriate priority, for example a priority of "2" or "3."

Changing the completion date
Click the "Completed on" box to select a date.

Changing the confidentiality
Select "Confidential" to keep your work confidential.

For example, if others can read and write to your To Do task file because they have read and write access and you are coordinating an awards ceremony for a co-worker and want to keep a To Do task confidential, select this option, and the coworker cannot read or write to this To Do task.

{button ,AL(`H_EDITING_A_TO_DO_TASK_STEPS',1)} Go to procedure

{button ,AL(`;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',0)} See related topics

Editing a To Do task

1. Double-click the To Do task.
2. Edit the To Do task.

   See details
3. Click OK to enter your changes.

Tip Press TAB to move between options in the Edit Task dialog box.

{button ,AL(`H_EDITING_A_TO_DO_TASK_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Details: Creating a To Do task

Keyboard shortcuts
You can also go to the To Do section and press INS to create a To Do task.

Creating To Do tasks in other ways
You can also choose Create - Task when you are in the To Do section.

{button ,AL(`H_INSERTING_A_TO_DO_TASK_STEPS',1)} Go to procedure

Creating a To Do task

1. Go to the To Do section and double-click the To Do page.

2. Under "Description," enter a description for the To Do task.
3. (Optional) Select the appropriate options: "Date," "Categories," "Priority," "Completed on," "Confidential."
4. Click OK.

Tip To create additional To Do tasks, click Add before you click OK. When you finish entering all your To Do tasks, click OK.

{button ,AL(`H_INSERTING_A_TO_DO_TASK_DETAILS',1)} See details

{button ,AL(`H_ABOUT_TO_DO_OVER;H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Selecting To Do task options

Option	Result
No date	Assigns (default) no date to the To Do task you create.
Start	Uses or doesn't use (default) a start date for each To Do task you create.
Due	Uses or doesn't use (default) a due date for each To Do task you create.
Categories	Establishes a category for each To Do task you create. For example, marketing, finance, and so on.
Priority	Establishes a priority or uses no priority (default) for each To Do task you create.
Completed on	Lets you specify or not specify (default) the date you completed the To Do task.
Confidential	Makes or doesn't make (default) the To Do task confidential, so others accessing your file can't view it.
	If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Details: Marking a To Do task completed

Marking To Do tasks completed in another way

You can also mark a To Do task completed by clicking to the left of the To Do task.

Completing To Do tasks

Depending on the selections you made to your To Do Preferences options (in the To Do Preferences dialog box), your completed To Do tasks appear and function differently.

If you selected "Strikethrough," Organizer shows completed To Do tasks with a strikethrough line. If you selected "Delete task when completed," your To Do tasks automatically disappear from your To Do section when they are completed.

Understanding how status changes affect To Do tasks

If you select "Show completed tasks," your To Do tasks will move automatically to the Completed page or to the Completed heading. The color of the To Do task text changes when To Do tasks are marked Completed.

{button ,AL(`H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS',1)} Go to procedure

Marking a To Do task completed

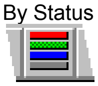
1. Double-click the To Do task you want to mark completed.
2. Click the "Completed on" box.
3. Select the date you want.
4. Click OK.

{button ,AL(`H_MARKING_A_TO_DO_TASK_COMPLETED_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Sorting To Do task options

The Sort icons appear in Toolbox. You can click an icon instead of choosing the command.

Command	Result
By Priority 	Sorts your To Do priority page tabs as 1, 2, 3, none; A, B, C, none; H, M, L, none. (None is for tasks you didn't assign a priority to.)
By Status 	Sorts (default) your To Do status page tabs as Overdue, Current, Future, and Completed.
By Start date 	Sorts your To Do date page tabs by start date: January through December of the current year with additional tabs for the former and the latter years.
By Category 	Sorts your To Do category page tabs alphabetically (A - Z) and includes # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.

Details: Prioritizing a To Do task

Assigning a priority to a To Do task
You can assign a priority of "1," "2," or "3" to your To Do task; "1" represents the highest priority and "3" represents the lowest. You can also assign "No priority" (default) to your To Do task.

{button ,AL(`H_PRIORITIZING_A_TO_DO_TASK_STEPS',1)} Go to procedure

Prioritizing a To Do task

You can assign a priority when you create or edit a To Do task.

1. Create or edit a To Do task.
2. Select the priority you want to assign to your To Do task.
   See details
3. Click OK.

{button ,AL(`H_PRIORITIZING_A_TO_DO_TASK_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Details: Showing To Do tasks in Calendar

Editing a To Do task in Calendar
If you want to edit a To Do task and you're in the Calendar section, double-click the To Do task. The Edit Task dialog box appears. Make your changes and click OK.

Rescheduling a To Do task in Calendar
If you want to reschedule a To Do task and you're in the Calendar section, you can drag and drop the To Do task to a different day on any of the days that appear on your current pages. If you want to reschedule a To Do task to a day on another page, click  in Toolbox, select the To Do task, go to the day you want, and click.

Showing entries while displaying time slots in Day per Page view
If you're using the Day per Page view with time slots, the entries you show through in Calendar don't scroll out of view as you scroll through the day's appointments; that is, the show-through entries stay either above or below the time slots.

Organizer blocks out an area at the top or bottom of your appointments for entries you who through in Calendar. You can expand or shrink this block by dragging the solid box in the bottom right corner. The new size of this area affects all pages in the Day per Page view.

You can also drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

- New size to use the size you dragged for all pages.
- Temporary size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16, the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

{button ,AL(`H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS',1)} Go to procedure

{button ,AL(`;H_EDITING_A_TO_DO_TASK_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS',0)} See related topics

Showing To Do tasks in Calendar

By default, Organizer can show entries from the To Do, Calls, Planner, and Anniversary sections on the appropriate day in Calendar. Showing entries from other sections can help you see your upcoming commitments in the context of your daily work, for example, you can see your To Do tasks for the day along with your appointments. You can change the way your tasks appear in Calendar, and if you don't want to display your tasks in Calendar, you can turn off show through.

1. Choose Section - Show Through.

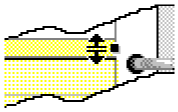
2. Click the "Show into" box and select "Calendar" as the section to show into.
3. (Optional) Under "From," deselect "To Do" if you don't want your tasks to appear in Calendar.

   Note If you want to redisplay your tasks in Calendar, select "To Do" again.
4. (Optional) Click Preferences and select options for whether To Do tasks appear above or below appointments and how much of the To Do task's description to show in Calendar. Click OK to confirm your preferences.
5. Click OK.

Tip To print shown-through items, use any of the following print layouts: "Monthly Calendar," "Daily Page," or "Weekly 2-Page."

{button ,AL(`H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics



Details: Sorting To Do tasks

Changing the default sort order of To Do tasks in another way
You can choose View - To Do Preferences to change the sort order of your To Do tasks.

How sorting affects To Do tasks
To Do uses page tabs to group information within the section. The tabs you see depend on the sort order you select for To Do tasks.

If you sort To Do tasks by priority, Organizer displays tabs for the priority scheme you selected (1, 2, 3 or A ,B, C or H, M, L). If you sort by status, Organizer displays tabs for Overdue, Current, Future, and Completed. If you sort by start date, Organizer displays month tabs, along with a tab for the previous and next year. If you sort by category, Organizer displays alphabetical tabs showing A - Z, with # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.

{button ,AL(`H_SORTING_THE_TO_DO_LIST_STEPS',1)} Go to procedure

Sorting To Do tasks

You can sort your To Do tasks by priority, status, start date, or category.

1. Go to the To Do section.
2. Choose View.
3. Choose one of the following commands.
4. Click OK.

{button ,AL(`H_SORTING_THE_TO_DO_LIST_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Status of To Do tasks

The following table lists default colors used to indicate the status of tasks in the To Do section. You can change the colors using View - To Do Preferences.

Status	Color
Overdue	Red (default)
Current	Green (default)
Future	Blue (default)
Completed	Black (default)

Selecting the sort order of To Do tasks

Option	Result
Priority	Sorts your To Do priority page tabs as 1, 2, 3, none; A, B, C, none; or H, M, L, none. (None is for tasks you didn't assign a priority to.)
Status	Sorts (default) your To Do status page tabs as Overdue, Current, Future, and Completed.
Start date	Sorts your To Do date page tabs by start date: January through December of the current year with additional tabs for the former and the latter years.
Category	Sorts your To Do category page tabs alphabetically (A through Z) and includes # for entries you didn't assign a category to or entries that begin with non-alphabetical characters, such as @, or numbers like 01890.
Due date	Sorts your To Do date page tabs by due date (January through December of the current year with additional tabs for the former and the latter years) or by completion date.

Customizing the appearance and function of your To Do section

Option	Result
Start headings	Lets you place your To Do task priority headings starting at the top of the next page (default), one after another on the same page, each priority heading starting on the left page, or each priority heading starting on the right page.
Priority as	Lets you specify the priority rating of your To Do tasks as 1, 2, 3 (default); A, B, C; or H, M, L.
Show page tabs	Shows (default) or doesn't show the To Do page tabs, for example, priority, status, category, or date page tabs.
Show	Shows or doesn't show (default) a symbol with To Do tasks. indicates that a task is confidential. indicates that a task has an alarm. indicates that a task is a repeating entry. indicates that a category symbol appears with the task. The symbol for the category you specified appears with each task.
Show completed tasks	Shows (default) or doesn't show the completed To Do task.
Strikethrough	Draws a line through the To Do task when you mark the task completed.
Delete task when completed	Automatically deletes a To Do task when you mark it completed.
Turn to entry after Create/Edit	Goes or doesn't go (default) to the page on which the To Do task is entered or edited.

Selecting what information you see with your To Do task

Option	Result
Start date	Shows (default) or doesn't show the start date you assign your To Do task.
Due date	Shows (default) or doesn't show the due date you assign your To Do task.
Categories	Shows or doesn't show (default) the categories you assign your To Do task.
Priority	Shows (default) or doesn't show the priority you assign your To Do task.
Completed date	Shows or doesn't show (default) the date on which you complete your To Do task.
Cost code	Shows or doesn't show (default) the cost code you assign your To Do task.
All lines of description	Shows (default) or doesn't show the entire description of your To Do task. You can enter a number to represent the number of lines of description you want to appear with your To Do tasks.

Selecting the status color of your To Do tasks

You can change the default colors listed below.

Option	Result
Overdue	Red (default)
Current	Green (default)
Future	Blue (default)
Completed	Black (default)

Overview: Using Organizer on a notebook computer

Although information in the group scheduling version of Organizer 97 GS is stored in Notes, you can still work with Organizer on a notebook computer when you're away from the network. You can work with a local copy of your Notes mail file, replicating your changes with the network version, or interactively through a modem or other communication device.

Tip Working with a local replica and replicating changes tends to be faster than working interactively, especially if you're communicating with the Notes server through a modem.

Note Both the Organizer and Notes program files must be installed on the notebook computer you're using while away from the network.

Working with a local replica

You can also work with a local replica of your Notes mail database and then replicate changes. To do so, perform the following setup:

- Create a local replica of your Notes mail database and copy it to the notebook computer.
- Create a location document appropriate for a local or disconnected location.
- Switch to the location document in the version of Notes on the notebook computer.
- (Optional) Close Notes.

When you start Organizer, a message may appear asking you to confirm that you are working locally, and then a prompt appears asking for your Notes password. If you provide the correct password, Organizer opens the local replica of your mail database.

Note If the password prompt does not appear or if an error occurs, it typically indicates that either Notes is unavailable, your Notes location document has not been configured properly, or that the mail file location in the location document is incorrect. Start Notes and review the current location document.

Once you open the local replica, you can work as you usually would with Organizer. However, meetings you schedule or meetings notices to which you respond won't actually be sent until you replicate the database.

When scheduling a meeting while working remotely with a local replica, you can only select meeting attendees whose names appear in Name and Address Books you store locally (for example, in your Personal Name and Address Book). See the Notes Help system for information on adding free time information for names in a local Name and Address Book.

You can replicate changes between the home server and local copy of your mail database when you reconnect with the network. Or, if your notebook computer and home server each have a modem and you have the correct location and port configuration, you can call your home server and replicate changes from the notebook computer.

See the Notes Help system or your system administrator for more information on using Notes replication features.

Note A replication conflict occurs when two or more users edit the same entry in different replicas between replication operations. For example, if you grant another user manager access to your mail database, and while you're away the other user makes changes to an Organizer entry for you, a replication conflict results if you later replicate changes to the same entry. Organizer marks replication conflicts with a diamond symbol. Choose File - Replication Conflicts to resolve conflicts.

Organizer does not report appointment and meeting conflicts as replication conflicts. Such appointments and meeting will appear in your calendar with a conflict bar, provided you have selected this option in the Calendar Preferences dialog box.

Working online from a remote location

To use Organizer from a remote location, perform the following setup in the version of Notes installed on the notebook computer:

- Create a location document appropriate for the remote location.
- Choose File - Tools - User Preferences and configure all ports for the remote location.
- Switch to the location document.

While you're connected to your Notes home server from the remote location, you can start and use Organizer as if you were on the network.

See the Notes Help system or your system administrator for more information on creating and using Notes location documents.

{button ,AL(`;H_OPENING_AN_ORGANIZER_FILE_STEPS;H_RESOLVING_REPLICATION_CONFLICTS_STEPS',
0)} See related topics

Resolving replication conflicts

Option	Results
Remove Conflicts	Deletes the selected entry.
Keep Entry	Makes the selected entry a separate entry.
Turn To	Turns to the entry in Organizer.

Resolving replication conflicts

If Organizer detects conflicts in an entry after you perform a replication operation in Notes or when two or more users edit the same entry in the same file, a diamond symbol appears with the conflicting entry.

You can choose to delete one or more of the conflicting entries or save them as separate entries.

1. Choose File - Replication Conflicts.
2. Select a conflict.
3. Select an option to resolve the conflict.
4. If you're done resolving conflicts, click Close.

{button ,AL(`H_ABOUT_USING_ORGANIZER_ON_A_LAPTOP_OVER',0)} See related topics

Details: Accepting an invitation

Opening a meeting notice in other ways
You can also open a meeting notice by selecting it in the Meeting Notices dialog box and clicking Open.

Reviewing meeting details
The Invitation tab gives you the following information:

- Who is requesting the meeting
- The date, time, and duration of the meeting
- The meeting description
- The meeting room
- If the meeting repeats
- If the meeting is required or optional
- You can't make changes to this information on the Invitation tab. To make changes to the way the meeting appears in your calendar, click the Meeting tab.

Specifying the way the meeting appears in your calendar
You can use the Meeting tab to set options for a meeting and modify the description of the meeting provided by the chairperson. You can't change the date, time, or duration of the meeting.

You can also use the Meeting tab to set an alarm or cost code for the meeting.

Turning to the day of a meeting
Click Turn To on the Invitation or Meeting tab to look at the appointments already scheduled for the day of a meeting to which you're invited. Organizer turns to the day of the meeting in your calendar, and the dialog box remains visible so you can select a response to the invitation.

Viewing free time
When you click the Free time tab, a series of time bars appear for each meeting attendee, showing the attendee's free time in white and any time slots already booked by the attendee in blue.

Note If the time bar for an attendee is dimmed, either that person's Notes Mail server is temporarily unavailable, that person hasn't chosen to give access to their free time schedule, that person hasn't set up a Notes Calendar Profile, or that person isn't a Notes user.

Entering an appointment for a meeting in another time zone
Meeting notices reflect the time zone you're in when you receive the notice, which isn't necessarily the time zone in which the meeting will be held. Therefore, if you're planning to attend a meeting in a time zone different from your own, you should enter an additional appointment in your Organizer calendar at the time the meeting will actually be held in that time zone.

For example, you accept a meeting notice in Boston (Eastern Standard Time) for a meeting you'll attend in California (Pacific Standard Time). The meeting will appear in your calendar at 12:00 noon (EST), but you may want to enter an additional appointment at 9:00 a.m. (PST) to remind you of the correct time for the time zone in which you will be attending the meeting.

{button ,AL(`H_ACCEPTING_AN_INVITATION_STEPS',1)} Go to procedure

Accepting an invitation

The hands in shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.

2. Under "Notices," double-click a meeting invitation to open it.

   See details
3. Review the details of the meeting on the Invitation tab.

   See details
4. (Optional) To specify the way the meeting appears in your calendar, click the Meeting tab and set the meeting options.

   See details
5. (Optional) To see the other people invited to the meeting, click the Attendees tab.
6. (Optional) To see a view of the free time of the other people invited to the meeting, click the Free time tab.

   See details
7. (Optional) To send a message to the chairperson with your acceptance, click the Reply tab and enter a message under "To."
8. Click Accept.
9. Click OK.
10. If you're done processing meeting notices, click Close.

Organizer adds the meeting to your Calendar and sends your acceptance along with any reply to the chairperson as a Notes mail message.

Note Organizer considers repeating meetings as broadcast meetings to which the chairperson doesn't require responses. If you receive an invitation for a repeating meeting, you can click Add to Calendar if you plan to attend the meetings, or Close if you don't plan to attend. The chairperson won't receive notification in either Notes or Organizer.

{button ,AL(`H_ACCEPTING_AN_INVITATION_DETAILS',1)} See details

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS',0)} See related topics

Changing meeting notices preferences

Changing meeting notices preferences is optional. If you don't change your meeting notices preferences, Organizer uses the default preferences.

1. Choose File - User Setup - Meeting Notices.
2. Under "Options," select whether you want Organizer to display dialog boxes that ask you to confirm your actions as you process meeting notices.

   The default is to display confirmation dialog boxes.
3. Under "New notices," select the options for the frequency with which you want Organizer to check for new meeting notices and if you want a tune played to signal new notices.
4. Click OK.

{button ,AL(`H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS',0)} See related topics

Details: Declining an invitation

Opening a meeting notice in other ways
You can also open a meeting notice by selecting it in the Meeting Notices dialog box and clicking Open.

Reviewing meeting details
The Invitation tab gives you the following information:

- Who is requesting the meeting
- The date, time, and duration of the meeting
- The meeting description
- The meeting room
- If the meeting repeats
- If the meeting is required or optional
- You can't make changes to the information on the Invitation tab.

Turning to the day of a meeting
Click Turn to on the Invitation or Meeting tab to look at the appointments already scheduled for the day of a meeting to which you're invited. Organizer turns to the day of the meeting in your calendar, and the dialog box remains visible so you can select a response to the invitation.

Viewing free time
When you click the Free time tab, a series of time bars appear for each meeting attendee, showing the attendee's free time in white and any time slots already booked by the attendee in blue.

Note If the time bar for an attendee is dimmed, either that person's Notes Mail server is temporarily unavailable, that person hasn't chosen to give access to their free time schedule, that person hasn't set up a Notes Calendar Profile, or that person isn't a Notes user.

{button ,AL(`H_DECLINING_AN_INVITATION_STEPS',1)} Go to procedure

Declining an invitation

The hands in shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.
2. Under "Notices," double-click a meeting invitation to open it.
   See details
3. Review the details of the meeting on the Invitation tab.
   See details
4. (Optional) To see the other people invited to the meeting, click the Attendees tab.
5. (Optional) To see a view of the free time of the other people invited to the meeting, click the Free time tab.
   See details
6. (Optional) To send a message to the chairperson with your response, click the Reply tab and enter a message under "To."
7. Click Decline.
8. Click OK.
9. If you're done processing meeting notices, click Close.

Organizer sends your response along with any reply to the chairperson as a Notes mail message.

{button ,AL(`H_DECLINING_AN_INVITATION_DETAILS',1)} See details

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS',0)} See related topics

Details: Delegating an invitation

Opening a meeting notice in other ways
You can also open a meeting notice by selecting it in the Meeting Notices dialog box and clicking Open.

Reviewing meeting details
The Invitation tab gives you the following information:

- Who is requesting the meeting
- The date, time, and duration of the meeting
- The meeting description
- The meeting room
- If the meeting repeats
- If the meeting is required or optional
- You can't make changes to the information on the Invitation tab.

Entering the name of an appointee
If you know the name of the person, you can enter it in the "To" box.   As you enter the name, Organizer tries to match the letters you type with names in the current Name & Address Book and supply the rest of the name.

To select from a list of names or change which Name & Address Book you're using, click Names.

Checking free time
The time bar displays the free time of each attendee in white and the booked time in blue. If there is no conflict with any attendee's free time, the meeting time appears at the right of the time bars in green. If there is a conflict, the proposed meeting time appears in red.

Note If the time bar for an attendee is dimmed, either that person's Notes Mail server is temporarily unavailable, that person has chosen not to give access to their free time schedule, that person hasn't created a Notes Calendar Profile, or that person isn't a Notes user.

Turning to the day of a meeting
Click Turn to on the Invitation or Meeting tab to look at the appointments already scheduled for the day of a meeting to which you're invited. Organizer turns to the day of the meeting in your calendar, and the dialog box remains visible so you can select a response to the invitation.

{button ,AL(`H_DELEGATING_AN_INVITATION_STEPS',1)} <u>Go to procedure</u>

Delegating an invitation

Organizer lets you delegate a meeting. That is, you can forward the meeting invitation to someone else and ask them to attend in your place. The hands in shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.
2. Under "Notices," double-click a meeting invitation to open it.
   See details
3. Review the details of the meeting.
   See details
4. (Optional) To see the other people invited to the meeting, click the Attendees tab.
5. Click Delegate.
6. For "To," enter the name of the person to whom you want to delegate the meeting (the appointee).
   See details
7. (Optional) To confirm that the appointee is free during the meeting time, click the Free time tab.
   See details
8. (Optional) To send a message to the chairperson or the appointee, click the Reply tab and enter the message.
9. Click Send delegation.
10. Click OK.
11. If you're done processing meeting notices, click Close.

Organizer forwards the invitation notice to the person you delegated it to, along with any reply you entered, and also sends your response and any reply to the chairperson as a Notes mail message. Organizer doesn't enter the meeting in your calendar.

{button ,AL(`H_DELEGATING_AN_INVITATION_DETAILS',1)} See details

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS',0)} See related topics

Deleting a meeting from your calendar

If you accepted a meeting invitation and then can't attend, you can delete the meeting from your Calendar section.

1. Go to the Calendar page on which the meeting appears.
2. Drag and drop the meeting to Trash in Toolbox.

Organizer sends a decline response to the chairperson as a Notes mail message.

Note You can also delete a meeting by selecting it and pressing Delete.

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS',0)} See related topics

Detaching a file whose name already exists

Command button	Result
Overwrite	Writes over the file on disk with the file you're detaching.
Skip	Skips the file you're detaching, leaving the file on disk intact.
Cancel	Cancels the detach procedure.

Overview: Group scheduling

You can use Organizer to schedule and keep track of group meetings. You can:

- Specify the date, time, duration, and a list of attendees for a meeting.
- View the times that meeting attendees have already booked.
- Find the next available free time for a meeting if a conflict exists for one or more attendees.
- Accept, decline, delegate, or propose another date or time for meetings to which you're invited.
- Track responses to meetings you schedule.

Organizer works interactively with Notes to accomplish group-scheduling tasks. You must have Notes 4.5 installed on your computer in order to use group-scheduling in Organizer. Notes doesn't have to be running when you're performing group scheduling tasks in Organizer.

Note You can also exchange meetings notices with Organizer 2.11 users working in cc:Mail or a version of Notes earlier than Notes 4.51.

{button ,AL(`H_SETTING_UP_NOTES_FOR_ORGANIZER_GROUP_SCHEDULING_OVER;H_SCHEDULING_A_MEETING_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;',0)} See related topics

Details: Penciling in an invitation

Opening a meeting notice in other ways
You can also open a meeting notice by selecting it in the Meeting Notices dialog box and clicking Open.

Reviewing meeting details
The Invitation tab gives you the following information:

- Who is requesting the meeting
- The time and duration of the meeting
- The meeting description
- The meeting room
- If the meeting repeats
- If the meeting is required or optional

You can't make changes to this information on the Invitation tab. To make changes to the way the meeting appears in your Calendar, click the Meeting tab.

Turning to the day of a meeting
Click Turn to on the Invitation or Meeting tab to look at the appointments already scheduled for the day of a meeting to which you're invited. Organizer turns to the day of the meeting in your calendar, and the dialog box remains visible so you can select a response to the invitation.

Viewing free time
When you click the Free time tab, a series of time bars appear for each meeting attendee, showing the attendee's free time in white and any time slots already booked by the attendee in blue.

Note If the time bar for an attendee is dimmed, either that person's Notes Mail server is temporarily unavailable, that person hasn't chosen to give access to their free time schedule, that person hasn't created a Notes Calendar Profile, or that person isn't a Notes user.

{button ,AL(`H_PENCILLING_IN_A_INVITATION_STEPS',1)} Go to procedure

Details: Processing confirmation, update, and cancellation notices

Opening a meeting notice in other ways
You can also open a meeting notice by selecting it in the Meeting Notices dialog box and clicking Open.

Turning to the day of the meeting
If you want to look at appointments you scheduled for the day of the meeting, click Turn to. Organizer turns to the day of the meeting in the Calendar section and the dialog box remains visible so you can select a response to the invitation.

Viewing free time
When you click the Free time tab, a series of time bars appear for each meeting attendee, showing the attendee's free time in white and any time slots already booked by the attendee in blue.

Note If the time bar for an attendee is dimmed, either that person's Notes Mail server is temporarily unavailable, that person hasn't chosen to give access to their free time schedule, that person hasn't created a Notes Calendar Profile, or that person isn't a Notes user.

{button ,AL(`H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS',1)} Go to procedure

Processing confirmation, update, and cancellation notices

The chairperson of a meeting may send you a confirmation notice for a meeting, an update notice to reschedule the meeting, or a cancellation notice to cancel it.

1. Choose File - Meeting Notices.
2. Under "Notices," double-click a confirmation or cancellation notice.

   See details
3. Review the details of the meeting.
4. (Optional) To see the other people invited to the meeting, click the Attendees tab.
5. (Optional) If the notice is rescheduling a meeting, click the Free time tab to see the free time of attendees.

   See details
6. (Optional) If the notice is rescheduling a meeting, you can click the Meeting tab to change the options to control the way the meeting appears in your Calendar or to set a cost code or alarm for the meeting.
7. (Optional) If the notice is rescheduling a meeting, click the Reply tab and enter a message under "To" to include a reply to the chairperson with your response.
8. If the notice is rescheduling a meeting, click the appropriate button to accept, decline, delegate, or reschedule again.
9. Click OK.

Organizer either updates your Calendar with the meeting information or deletes the meeting from your Calendar.

{button ,AL(`H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_DETAILS',1)} See details

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Details: Proposing a meeting change

Opening a meeting notice in other ways
You can also open a meeting notice by selecting it in the Meeting Notices dialog box and clicking Open.

Reviewing meeting details
The Invitation tab gives you the following information:

- Who is requesting the meeting
- The date, time, and duration of the meeting
- The meeting description
- The meeting room
- If the meeting repeats
- If the meeting is required or optional

You can't make changes to the information on the Invitation tab. To make changes to the way the meeting appears in your Calendar, click the Meeting tab.

Editing the meeting
To change the date, you can click the "Date" box to display a monthly calendar, then click a date in the calendar. To move to the previous or next month, click the arrows at the top of the calendar. You can also click the "Date" box, then press and ↓ to change to the previous or next day, or enter a date in the "Date" box.

To change the start time and duration, you can click the "Time" box to display time tracker and specify a time and duration, or, in the "Duration" box, click + (plus) to increase the duration or - (minus) to decrease the duration. You can also click in the "Time" or "Duration" box and press and ↓ to change the time and duration or enter a time or duration.

Checking free time
The time bar displays the free time of each attendee in white and the booked time in blue. If there is no conflict with any attendee's booked time, the proposed meeting time appears in green. If there is a conflict, the proposed meeting time appears in red.

Note If the time bar for an attendee is dimmed, either that person's Notes Mail server is temporarily unavailable, that person hasn't chosen to give access to their free time schedule, that person hasn't created a Notes Calendar Profile, or that person isn't a Notes user.

Finding a time slot for a meeting

You can find an appropriate time to reschedule a meeting in the following ways:

- Scan the time bars for a time that is free for all attendees, then move the meeting there by dragging time tracker.
- Change the date if there isn't a suitable time on the day you chose.
- Click Find Time to have Organizer find the next best time for the meeting.

If you click Find Time, Organizer searches the free time of attendees and proposes the next time during which all attendees are free. Organizer looks for a time using the free time settings in each attendee's Notes Calendar Profile and the options in the Schedule Meeting Options dialog box. To change the options in the Schedule Meeting Options dialog box, display the Schedule Meeting dialog box and click Options.

Turning to the day of a meeting
Click Turn to on the Invitation or Meeting tab to look at the appointments already scheduled for the day of a meeting to which you're invited. Organizer turns to the day of the meeting in your calendar, and the dialog box remains visible so you can select a response to the invitation.

Receiving responses to your proposed meeting change
The chairperson can accept or decline your proposed change. If it's accepted, each attendee, including yourself, will be sent a Notes mail message and an Organizer meeting notice proposing the change. If it's declined, you'll receive a Notes mail message and an Organizer meeting notice.

Proposing a meeting change to a meeting you accepted
If you've already accepted a meeting, you can propose a meeting change by editing it. Go to Calendar, double-click the meeting, and change the day, time, or duration. Click OK to send the reschedule notice to the chairperson.

{button ,AL(`H_PROPOSING_A_MEETING_CHANGE_STEPS',1)} Go to procedure

{button ,AL(`H_Responding_to_a_declined_meeting_change_STEPS',0)} See related topics

Proposing a meeting change

If you're an attendee of a group meeting and want to change its time, you must get the approval of the chairperson. The hands in shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.
2. Under "Notices," double-click a meeting invitation to open it.

   See details
3. Review the details of the meeting on the Invitation tab.

   See details
4. (Optional) To see the other people invited to the meeting, click the Attendees tab.
5. Click Reschedule.
6. Edit the meeting date, time, or duration.

   See details
7. (Optional) To confirm that all attendees are free during the meeting time you are proposing or to find a free time, click the Free time tab.

   See details
8. (Optional) To send a message to the chairperson with your response, click the Reply tab and enter a message under "To."
9. (Optional) To specify options that control the way the meeting appears in your calendar, click the Meeting tab.
10. Click Propose reschedule and then click OK.
11. If you're done processing meeting notices, click Close. See details

The proposed reschedule is sent to the chairperson as both an Organizer meeting notice and a Notes mail message. Organizer enters the meeting in your calendar in its original date and time.

{button ,AL(`H_PROPOSING_A_MEETING_CHANGE_DETAILS',1)} See details

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Details: Reading an attachment

Launching or detaching a file from your calendar

If you accept or propose a different time for a meeting that includes an attachment, appears with the meeting in your calendar. When you click the icon, Organizer displays the following options to launch or detach the file.

Option	Result
File name	Launches the file. When you finish with the file, choose File - Exit or switch back to the Organizer window.
	There must be an application associated with the file to launch it. Use the Windows File Manager to associate file extensions with applications.
Ellipsis (...)	Displays a dialog box with which you can detach the file.

{button ,AL(`H_READING_AN_ATTACHMENT_STEPS',1)} Go to procedure
{button ,AL(`H_Linking_to_a_file_or_application_STEPS;',0)} See related topics

Reading an attachment

If a meeting notice includes an attachment, a paper clip symbol appears with the notice.

1. Choose File - Meeting Notices.

2. Select a meeting invitation with an attachment.
3. Click Detach.
4. Select the files you want to detach.
5. (Optional) Select a location to which to detach the file(s).
6. Click Detach.
7. (Optional) If you're detaching a file and another file already exists with the same name, enter a new name for the file you're detaching and press ENTER, or click another option.

Note If you accept or propose a different time for a meeting that includes an attachment, Organizer enters the meeting in your calendar with a link symbol . You can click the link symbol to launch or detach the attachment. For more information, see details.

{button ,AL(`H_READING_AN_ATTACHMENT_DETAILS',1)} See details

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Details: Responding to a declined meeting change

Opening a meeting notice in other ways
You can also open a meeting notice by selecting it in the Meeting Notices dialog box and clicking Open.

Turning to the day of the meeting
If you want to look at appointments you scheduled for the day you tried to reschedule to or the original day of the meeting, click the Declined tab, and then click the Turn to button to the right of the "Proposal declined" area or the"Remains scheduled for" area. Organizer turns to the day of the meeting in your calendar section and the dialog box remains visible so you can select a response.

On the Meeting tab, click the Turn to button to move to the original day of the meeting in your calendar.

{button ,AL(`H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS',1)} <u>Go to procedure</u>

Responding to a declined meeting change

The chairperson of a meeting may decline your proposed meeting change. appears with a meeting notice declining a proposed change.

1. Choose File - Meeting Notices.
2. Under "Notices," double-click a meeting notice that declines a change you proposed.

   See details
3. Review the details of the meeting on the Declined tab.
4. (Optional) If a Message tab appears, click the Message tab to review the message from the meeting chairperson.
5. (Optional) Click the Attendees tab to see other attendees, the Free time tab to see the available time of other attendees, the Meeting tab to specify options about the way the meeting appears in your Calendar, or the Reply tab to include a reply or attachment with your response to the chairperson.
6. Decide whether you want to accept, decline, delegate, or attempt again to reschedule the meeting and click the appropriate button.
7. Click OK.
8. If you're done processing meeting notices, click Close.

{button ,AL(`H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_DETAILS',1)} See details

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Responding to meeting invitations as an assistant

You can respond to a meeting invitation for someone else if the other person has included your name in the list of people who can manage their calendar in the Delegation Profile for their Notes mail database.

1. Verify that the person for whom you want to respond to a meeting invitations has included your name in their Notes Delegation Profile.
2. Choose File - Open.

3. Under "Names," select the name of the person for whom you are scheduling the meeting and click OK.
4. Choose File - Meeting Notices and respond to the invitations.
5. Choose File - Open to return to your own desktop.
6. Select your name and click OK.

The response you send will include your name first, and the name of the person for whom you're responding in parentheses after your name.

{button ,AL(`H_SETTING_UP_NOTES_FOR_ORGANIZER_GROUP_SCHEDULING_OVER;H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_SPECIFYING_WHO_CAN_ACCESS_YOUR_FILES_STEPS;H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_STEPS',0)} See related topics

Selecting New notices options

Option	Result
Check every	Specifies the frequency with which Organizer checks for meeting notices. If you have received one or more notices, the hands in the Meeting notices icon shake and, if you have set this option, Organizer plays a tune. In order to distribute network activity, Organizer checks for notices within a random number of minutes between 2 and the number you specify. (The default is set by your system administrator.)
Tune	Plays or doesn't play (default) a tune to alert you when you have a meeting notice. Click the box to select a tune to play.

Setting meeting options

Option	Result
Description	Lets you change the description of the meeting. The description you enter is the one that will appear in your calendar.
Categories	Lets you establish one or more categories for the meeting.
Warn of conflicts	Alerts (default) or doesn't alert you when there is a conflict with the meeting and a previously scheduled appointment or meeting.
Pencil in	Tentatively enters the meeting.
Confidential	Makes or doesn't make (default) the meeting confidential, so others who have access to your files can't view it.

Overview: Setting up Notes for Organizer group scheduling

Organizer uses settings in your Notes mail file for group scheduling. The Organizer and Notes scheduling features work interactively. You can schedule meetings and respond to invitations in either Organizer or Notes. For example, when you send a meeting invitation using Organizer, the invitation is sent as both an Organizer meeting notice and a Notes mail message; when you accept an invitation, the meeting is entered into both your Organizer and Notes calendars.

The sections below summarize the setup you must perform in Notes in order to use group scheduling features in Organizer.

Creating a Notes Calendar Profile

You must create a Notes Calendar Profile in order to use group-scheduling features in either Notes or Organizer. The Calendar Profile lets you set the following scheduling options:

- The time at which each day in your calendar begins and the time at which each day in your calendar ends
- Times during which you're available for meetings (days of the week and hours of each day)
- Users who can view your free time while scheduling meetings (the default is to let all users view free time)
- Automatic processing of meeting notices

If you decide to automatically process notices, any invitations you receive that don't cause conflicts with existing meetings are automatically accepted in both Notes and Organizer. These meeting invitations or updates don't appear as Organizer meeting notices. Invitations that conflict with existing meetings or appointments do appear as Organizer meeting notices. You can also set up autoprocessing only for inivtitations from specific people.

To create or edit the Notes calendar profile, select your mail database in Notes and choose Actions - Calendar Tools - Calendar Profile. See the Notes Help system for more information on specifying scheduling options in the Calendar Profile.

Creating a Notes Delegation Profile

You can use the Delegation Profile in Notes to allow other users to read or manage your calendar in Organizer. To display the Delegation Profile, display the Notes Calendar Profile and click "Allow other users to view your calendar."

If you select "Everyone can read my Calendar" in the Delegation Profile, other users can add your Calendar section to an Organizer binder or display your calendar in multiple calendar view, but can't make appointments for you or respond to meeting invitations. If you select "Everyone can manage my Calendar," other users can view your calendar and also make appointments, schedule meetings, and respond to meeting invitations for you. You can also specify that only certain users can read or manage your calendar.

See the Notes Help system for more information on granting other users access to your Notes mail database.

Using Notes to specify available rooms and resources

When scheduling a meeting in Organizer, you can choose the room for the meeting and specify any resources (such as computers) that will be needed for the meeting. You can only select rooms and resources for which profiles exist in Notes.

To specify a profile for a room or resource, you must create or have access to a Notes Resource Reservations database. See your Notes administrator or the Notes Help system for more information on creating resource profiles in a Resource Reservations database.

{button ,AL(`H_OVERVIEW_GROUP_SCHEDULING_OVER;H_SCHEDULING_A_MEETING_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PENCILING_IN_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;',0)} See related topics

Accepting or declining a meeting change

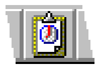
Option	Result
Accept reschedule	Accepts the proposed change. Organizer automatically enters the change in your calendar and sends the attendees a Notes mail message and an Organizer meeting notice informing them of the change.
Decline reschedule	Declines the proposed change. Organizer sends a Notes mail message and an Organizer meeting notice declining the change to the attendee who proposed it.

Details: Canceling a meeting

Cutting a meeting to Clipboard

To cut a meeting to Clipboard, select the meeting and choose Edit - Cut, press CTRL+X, or click .

When you cut a meeting to Clipboard, Organizer deletes all scheduling details of the meeting, such as the list of attendees. Organizer does add the appointment details, such as the date, time, and duration, to Clipboard. If you paste the meeting to another location or another application by choosing Edit - Paste, pressing CTRL+V, or clicking , Organizer creates an appointment. You must edit the appointment and re-invite attendees to make the appointment a meeting.

You can also drag and drop  to move the entry you cut to a new location. Again, Organizer pastes only the appointment details, which you must then edit to turn the appointment into a meeting.

{button ,AL(`H_CANCELING_A_MEETING_STEPS',1)} Go to procedure

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_SCHEDULING_A_MEETING_STEPS',0)} See related topics

Canceling a meeting

1. Go to Calendar.
2. Drag and drop a meeting to Trash in Toolbox.

Organizer sends a meeting notice and a Notes mail message to all the attendees who didn't decline the meeting informing them that the meeting is canceled.

{button ,AL(`H_CANCELING_A_MEETING_DETAILS',1)} See details

{button ,AL(`H_SCHEDULING_A_MEETING_STEPS;H_CHANGING_A_MEETING_STEPS;H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS;H_CHANGING_SCHEDULING_OPTIONS_STEPS;H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_CONFIRMING_A_MEETING_STEPS;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Details: Changing a meeting

Editing a meeting in other ways
You can also double-click the meeting and click Status in the Edit Appointment dialog box to edit a meeting.

Deleting a name from the attendees list
Click Remove in the Schedule Meeting dialog box to remove an already selected name from the list of attendees.

{button ,AL(`H_CHANGING_A_MEETING_STEPS',1)} Go to procedure

Changing a meeting

As chairperson, you can edit a meeting in the same way as you can edit any other appointment in your Calendar.

1. Go to Calendar.
2. Select the meeting
3. Choose Appointment - Status.
4. Edit the meeting.

   See details
5. Click OK.

The edited meeting appears in your Calendar, and Organizer sends attendees a meeting notice and Notes mail message informing them of the change.

Tip To change just the date of a meeting, drag and drop the meeting to a new date. To edit just the time, duration, or description of a meeting, select the meeting and then click the description. The , called the insertion point, appears in the description and time tracker appears over the Organizer binder rings.

Note You can't add an attachment while editing a meeting.

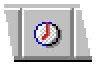
{button ,AL(`H_CHANGING_A_MEETING_DETAILS',1)} See details

{button ,AL(`H_SCHEDULING_A_MEETING_STEPS;H_CANCELING_A_MEETING_STEPS;H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS;H_CHANGING_SCHEDULING_OPTIONS_STEPS;H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_CONFIRMING_A_MEETING_STEPS;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS',0)} See related topics

Changing scheduling options

Scheduling options determine how Organizer displays free time in the Schedule Meeting dialog box and how it performs find time searches. Changing scheduling options is optional; if you don't change your scheduling options, Organizer uses the default options.

1. Go to Calendar and double-click the Calendar page on the date of the meeting.



2. If necessary, select the date, time, duration and enter a description for the meeting.
3. Click Invite.
4. Select the attendees and, if available, the room and resources for the meeting.
5. Click Options.
6. Under "Free time viewer," select options for how you want Organizer to display free time on the Free Time tab.
7. Under "Find time," select the options you want Organizer to use to try to find time for a meeting.
8. Click OK to return to the Schedule Meeting dialog box.
9. Click OK to return to the Create Appointment dialog box.
10. (Optional) Select any appointment options for the meeting (for example, if you want to assign an alarm to the meeting or assign it a category or cost code).
11. Click OK.

{button ,AL(`H_SCHEDULING_A_MEETING_STEPS;H_CHANGING_A_MEETING_STEPS;H_CANCELING_A_MEETING_STEPS;H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS;H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_CONFIRMING_A_MEETING_STEPS;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Confirming a meeting

You can send a confirmation notice prior to a meeting as a reminder to attendees.

1. Go to Calendar.
2. Select a meeting.
3. Choose Appointment - Status.
4. Click Confirm.

Organizer sends attendees the confirmation as an Organizer meeting notice and a Notes mail message.

{button ,AL(`H_SCHEDULING_A_MEETING_STEPS;H_CHANGING_A_MEETING_STEPS;H_CANCELING_A_MEETING_STEPS;H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS;H_CHANGING_SCHEDULING_OPTIONS_STEPS;H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Processing a meeting response

Option	Result
OK	Updates the status of the attendee.
Notify	Updates the status of the attendee and sends a status update notice to all other attendees.

Details: Responding to proposed meeting changes

Opening a meeting response in other ways
You can also open a meeting response by selecting it in the Meeting Notices dialog box and clicking Open.

Checking free time
The time bar shows the free time of an attendee in white and the booked time in blue. If there's no conflict with any attendee's free time, the meeting time appears at the right of the time bars in green. If there is a conflict, the proposed meeting time appears in red.

Note If the time bar for an attendee is dimmed, either that person's Notes Mail database is temporarily unavailable, that person has chosen not to give access to their free time schedule, that person hasn't created a Notes Calendar Profile, or that person is not a Notes user.

Finding a time slot for a meeting
If there's a conflict with the proposed reschedule time and you want to find another time slot, you can do one of the following:

- Scan the time bars for a time that is free for all attendees, then move the meeting there by dragging time tracker.
- Change the date if there is no suitable time on the day you chose.
- Click Find Time to have Organizer find the next best time for the meeting.

  If you click Find Time, Organizer searches the free time of attendees and proposes the next time during which all attendees are free. Organizer looks for a time using the free time settings in each attendee's Notes Calendar Profile and the options in the Schedule Meeting Options dialog box. If you don't like the time that Organizer finds, click Reset to revert to the original time and date of the meeting.

  You can click Options to change the options in the Schedule Meeting Options dialog box.

Turning to the day of a meeting
If you want to look at appointments or meetings you scheduled for the day of this meeting's original or rescheduled time, click Turn to to the right of either "Presently scheduled for" or "Proposed reschedule to." Organizer turns to the day of the meeting in the Calendar section and the dialog box remains visible so you can select a response.

{button ,AL(`H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS',1)} Go to procedure

Responding to proposed meeting changes

1. Go to Calendar.
2. Choose File - Meeting Notices.

3. Double-click a meeting response in which the attendee proposes a meeting change.

   See details

4. (Optional) To see any message sent with the proposed change, click the Message tab.
5. (Optional) To look at the available time of other attendees, click the Free Time tab.

   See details

6. (Optional) To include a message with your response to the proposed change, click the Reply tab and enter a message.
7. (Optional) To change any details of the way the meeting appears in your calendar, click the Meeting tab.
8. Click the appropriate button for accepting or rejecting the meeting change.
9. Click OK.
10. If you're done processing meeting notices, click Close.

Organizer sends a meeting notice and a Notes mail message with your response.

{button ,AL(`H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_DETAILS',1)} See details

{button ,AL(`H_SCHEDULING_A_MEETING_STEPS;H_CHANGING_A_MEETING_STEPS;H_CANCELING_A_MEETING_STEPS;H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS;H_CHANGING_SCHEDULING_OPTIONS_STEPS;H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_CONFIRMING_A_MEETING_STEPS;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Scheduling a meeting as an assistant

You can schedule a meeting for someone else if the other person has included your name in the list of people who can manage their calendar in the Delegation Profile for their Notes mail database.

1. Verify that the person for whom you want to schedule the meeting has included your name in their Notes Delegation Profile.
2. Choose File - Open.

3. Enter or select the name of the person for whom you're scheduling the meeting.
4. Click OK.
5. Schedule the meeting.
6. Choose File - Open to return to your own desktop.
7. Enter your name in the text box or select your name from the list box.
8. Click OK.

The meeting notice and Notes mail message sent to attendees will include the name of the person for whom you're scheduling the meeting first, and then your name in ( ) parentheses afterward.

{button ,AL(`H_SETTING_UP_NOTES_FOR_ORGANIZER_GROUP_SCHEDULING_OVER;H_SCHEDULING_A_MEETING_STEPS;H_CHANGING_A_MEETING_STEPS;H_CANCELING_A_MEETING_STEPS;H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS;H_CHANGING_SCHEDULING_OPTIONS_STEPS;H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_CONFIRMING_A_MEETING_STEPS;H_MAKING_AN_APPOINTMENT_STEPS;H_USING_TIME_TRACKER_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;',0)} See related topics

Details: Scheduling a meeting

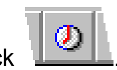
Scheduling meetings in other ways
You can also choose Create - Appointment or press INS when you're in the Calendar section to display the Create Appointment dialog box.

Specifying date, time, and duration
You can select the date, time, and duration of the meeting in either the Create Appointment or Schedule Meeting dialog box.

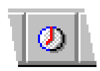
To select the date, click the "Date" box to display a monthly calendar, then click a date in the calendar. To move to the previous or next month, click the arrows at the top of the calendar. You can also click the "Date" box, then press and ↓ to change to the previous or next day, or enter a date in the "Date" box.

To select the start time and duration, you can click the "Time" box to display time tracker and specify a time and duration, or, in the "Duration" box, click the + (plus) to increase the duration or - (minus) to decrease the duration. You can also click in the "Time" or "Duration" box and press and ↓ to change the time and duration or enter a time or duration.

Specifying a date directly
You can select a date for your meeting by clicking the date in Calendar.

If you click the date itself, Organizer displays this date when you choose Create - Appointment or click .

If you click the blank area below the date, Organizer displays times. You can select a time for the meeting by double-clicking it. When you double-click a time, Organizer displays the Create Appointment dialog box. You can then click Invite to enter the rest of the details for the meeting.

You can also display a date directly by dragging and dropping  in Toolbox to the date of the appointment. Organizer displays the Create Appointment dialog box with the date already specified.

Changing an appointment to a meeting
To invite other users to an appointment already entered in your calendar, select the appointment and choose Appointment - Invite. The Schedule Meeting dialog box appears to let you select the attendees and other meeting options.

Selecting people for a meeting
To select someone for a meeting, do one of the following:

- Type the first few characters of the person's first or last name in the box on the Attendees tab, until Organizer displays the full name of the person. Click Add to add the name to the list of attendees.
- Click Names and then select attendees from the list that appears. Click Add to add the name to the list of attendees. To change to a different Name and Address Book, under "Address books," select the Name and Address Book you want. When you're done, click OK to leave the Names dialog box.

You can select and add more than one name in the Names dialog box. Organizer adds the names to the attendee list when you click OK.

Note You can only invite people to meetings whose names appear in either the Notes Public Name and Address Book or your Notes Personal Name and Address Book. To invite a person who isn't a Notes user to a meeting, you must first enter the person's name along with an e-mail or Internet address to your Personal Name and Address Book. You will not receive Organizer meeting notices nor be able to view the free time of attendees who aren't Notes users. You must also add the names to your Personal Name and Address Book if you're using Organizer while not connected to the Notes server. Since Organizer uses your Personal Name and Address book, adding a name to the Address section in Organizer is the same as adding it in Notes.Selecting a group name for a meeting

You can only select a group name for a meeting through the Names dialog box. You can't type a group name in the box on the Attendees tab.

If you select a group name for a meeting in the Names dialog box, Organizer asks if you want to expand the group. If you click Yes, Organizer adds each group member to the attendee list.

Tip Finding free time for large groups of people can be time-consuming. If you're sending a meeting invitation to a large number of people, it's recommended that you don't view free time on the Free time tab.

Deleting a name from the attendees list
Click Remove to remove an already selected name from the list of attendees.

Specifying if a meeting is required or optional

You can specify whether a meeting is required or optional for each attendee. Invitations to attendees include the required or optional setting.

If you select the appropriate option in the Schedule Meeting Options dialog box, Organizer only includes required attendees when you click Find Time to resolve a meeting conflict.

Specifying whether to receive responses to invitation

You can specify whether you want to receive responses to your invitation from each attendee. If you deselect "RSVP," you don't receive responses (such as acceptances or declines) from the attendee. If you leave "RSVP" selected, you do receive responses in Notes about attendee status.

An example of when to deselect the "RSVP" option for attendees is when you're inviting a large group (such as an entire department) to a meeting and individual responses won't affect the occurrence of the meeting.

Selecting rooms and resources for a meeting

You can only select rooms and resources for which profiles exist in Notes. To specify a profile for a room or resource, you must create or have access to a Notes Resource Reservations database. See your Notes administrator or the Notes Help system for more information on creating resource profiles in a Resource Reservations database.

When you click the "Room" box, Organizer displays the available rooms. When you select a room, Organizer displays the room capacity and description, if available.

When you click Details above the "Resources" box, Organizer displays the Resources dialog box. Select a resource under "Available Resources" to see a category or description, if available. Click Add to add the selected resource. When you finish selecting resources, click Close to return to the Schedule Meeting dialog box.

Viewing free time

When you click the Free Time tab, a series of time bars appear for each meeting attendee, showing the attendee's free time in white and any time slots already booked by the attendee in blue. If there's no conflict with any attendee's free time, the proposed meeting time appears in green to the right of the time bars. If there is a conflict, the proposed meeting time appears in red.

Note If the time bar for an attendee is dimmed, either that person's Notes mail server is temporarily unavailable, that person has chosen not to give access to their free time schedule, that person hasn't set up a Notes Calendar Profile, or that person is not a Notes user.

Finding a time for a meeting

If while viewing free time you see there's a conflict for one or more attendees, you may need to find another date or time for the meeting. You can find an appropriate slot in the following ways:

- Scan the time bars for a time that's free for all attendees, then move the meeting there by dragging the duration time (the center bar) in time tracker.
- Change the date if there's no suitable time on the day you chose.
- Click Find Time to have Organizer find the next best time for the meeting.

  If you click Find Time, Organizer searches the free time of attendees and proposes the next time during which all attendees are free. Organizer looks for a time using the free time settings in each attendee's Notes Calendar Profile and the options in the Schedule Meeting Options dialog box.

  You can click Reset to clear all attendees from the invitation list and revert to the original time and date of the meeting.

  You can click Options to change the options in the Schedule Meeting Options dialog box.
- Click in the "Recommended times" box to select a time.

  The "Recommended times" box includes other meeting times during which a majority of attendees has free time. When you select a time, Organizer changes the meeting to that time. You can determine who will be able to attend by looking at the time bar of each attendee and decide if you want to schedule the meeting for that time.

  Organizer displays unbroken free periods of time in the "Recommended times" box. Some of these periods might be longer than the original period of time you specified. For example, if you specify an hour-long time period, such as 09:00 AM - 10:00 AM for a meeting, Organizer might display a time period of 01:00 PM - 05:00 PM in the "Recommended times" box. If you select "01:00 PM - 05:00 PM," Organizer changes the time period to match the length of the specified time period and displays 01:00 PM - 02:00 PM in the "Time" box. To specify another time during the selected period (for example, 02:00 PM - 03:00 PM or 03:00 PM - 04:00 PM), click the "Time" box to select the time.

Changing scheduling options

Scheduling options determine the way Organizer displays attendees and their free time in the Schedule Meeting dialog box and searches for the free time of attendees when you click Find Time. Click Options to change scheduling options. When you're done, click OK.

Creating a repeating meeting
If you create a repeating meeting, Organizer considers the meeting a broadcast meeting. You won't receive responses in Notes about attendee status (such as acceptances or declines) and attendees only have the option of either adding the meeting to their Calendar or deleting the invitation.

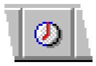
{button ,AL(`H_SCHEDULING_A_MEETING_STEPS',1)} Go to procedure
{button ,AL(`;H_CHANGING_SCHEDULING_OPTIONS_STEPS',0)} See related topics

Scheduling a meeting

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

1. Go to Calendar and double-click the Calendar page on the date of the meeting.

   See details



2. Under "Date," "Time," and "Duration," select the date (if necessary), start time, and duration (if necessary) of the meeting.

   See details
3. Under "Description," enter a description of the meeting.
4. Click Invite.
5. Enter the people you want to invite to the meeting. For each person, indicate if you want the meeting to be required or optional and whether you want to receive responses to your invitation from the person.

   See details
6. (Optional) Click the "Room" box to select a room to hold the meeting.

   See details
7. (Optional) Click Details above the "Resources" box to select resources for the meeting.

   See details
8. (Optional) To include an attachment with the meeting invitation, click Attach.
9. (Optional) If you want to make sure all attendees are available for the meeting, click the Free Time tab.

   See details
10. (Optional) To change scheduling options, click Options.

    See details
11. Click OK to close the Schedule Meeting dialog box.
12. (Optional) Select any options for the meeting (for example, if you want to set an alarm for the meeting, assign it a category or cost code, or make it a repeating meeting).

    See details
13. Click OK.

Organizer sends a meeting notice and Notes mail message to each attendee, requesting that they attend your meeting.

Note If the Invite button appears dimmed, you don't have access to group scheduling features. See your system administrator or installation documentation for more information.

{button ,AL(`H_SCHEDULING_A_MEETING_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_NOTES_FOR_ORGANIZER_GROUP_SCHEDULING_OVER;H_CHANGING_A_MEETING_STEPS;H_CANCELING_A_MEETING_STEPS;H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS;H_CHANGING_SCHEDULING_OPTIONS_STEPS;H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_CONFIRMING_A_MEETING_STEPS;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;H_MAKING_AN_APPOINTMENT_STEPS;H_USING_TIME_TRACKER_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;',0)} See related topics

Details: Sending an attachment with a meeting notice

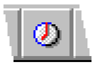
Removing an attached file
If you decide you don't want to attach a file you entered, select the file and then click Remove.

{button ,AL(`H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS',1)} Go to procedure
{button ,AL(`',0)} See related topics

Sending an attachment with a meeting notice

You can include an attachment with a meeting notice as you're scheduling a meeting. You can't add an attachment to a meeting you have already created.

1. Go to Calendar and double-click the Calendar page on the date of the meeting.



2. If necessary, select the date, time, duration, and enter a description for the meeting.
3. Click Invite.
4. Click Attach.
5. Specify the name of the first file to attach.
6. (Optional) If you want to attach any other files, click Add.
7. (Optional) Specify the name of any other files you want to attach and click Add.
8. When you are done specifying files to attach, click OK to return to the Schedule Meeting dialog box.
9. Click OK to return to the Create Appointment dialog box.
10. (Optional) Select any appointment options for the meeting (for example, if you want to assign an alarm to the meeting or assign it a cost code).
11. Click OK.

{button ,AL(`H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_DETAILS',1)} See details

{button ,AL(`H_SCHEDULING_A_MEETING_STEPS;H_CHANGING_A_MEETING_STEPS;H_CANCELING_A_MEETING_STEPS;H_CHANGING_SCHEDULING_OPTIONS_STEPS;H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_CONFIRMING_A_MEETING_STEPS;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;',0)} See related topics

Setting find time options

Option	Result
Search for 7 days	Sets the period of time in days during which Organizer tries to reschedule a meeting of the specified duration with the specified attendees. (The default is 7 days.)
Find time for required attendees only	Specifies that Organizer includes only required attendees when finding time for a meeting.

Details: Tracking responses to invitations

Status icons

Organizer adds the following status icons next to attendee's names in the Schedule Meeting dialog box. The chairperson icon () appears next to your name.

Icon	Status
	Attendee was sent an invitation to the meeting.
	Attendee accepted an invitation to the meeting or appointee accepted an invitation to the meeting.
	Attendee declined an invitation to the meeting or appointee 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).

{button ,AL(`H_TRACKING_RESPONSES_TO_INVITATIONS_STEPS',1)} Go to procedure

Tracking responses to invitations

As chairperson, you receive a Notes mail message informing you when an attendee accepts, pencils in, declines, or delegates a meeting. You receive an Organizer meeting notice and a Notes mail message when an attendee proposes a change to a meeting time.

You can check the status of attendees in Organizer without opening your Notes mail messages.

1. Go to Calendar.
2. Select a meeting.
3. Choose Appointment - Status.
4. Review the status icon that appears with each attendee's name.

   See details
5. (Optional) If a paper clip icon appears with the attendee name, it indicates the attendee included a message with their reply. Select the attendee name and click Message to display the message.

{button ,AL(`H_TRACKING_RESPONSES_TO_INVITATIONS_DETAILS',1)} See details

{button ,AL(`H_SCHEDULING_A_MEETING_STEPS;H_CHANGING_A_MEETING_STEPS;H_CANCELING_A_MEETING_STEPS;H_SENDING_AN_ATTACHMENT_WITH_A_MEETING_NOTICE_STEPS;H_CHANGING_SCHEDULING_OPTIONS_STEPS;H_RESPONDING_TO_PROPOSED_MEETING_CHANGES_STEPS;H_CONFIRMING_A_MEETING_STEPS;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS',0)} See related topics

Updating the free time of attendees

Option	Result
Show individual attendees free time	Displays free time next to each individual attendee's name (default).
Show consolidated daily free time	Displays free time by day. For each day, Organizer blocks off the times that any attendee has a conflict.

Details: Accessing a linked application

Switching between Organizer and other Windows applications
To switch between Organizer and any open Windows application, press ALT+TAB.

Understanding Link menu information
A Link menu lists all information that's linked to an entry.

The link description is preceded by a symbol that indicates the Organizer section that the link is in. For example, the symbol indicates the Calendar section.

The at the end of a link description indicates that this linked entry contains additional links. For example, you may have linked a scheduled appointment to more than one Address record.
An ... (ellipsis) after a link description indicates that the link is to an external file, application, or Uniform Resource Locator (URL).

Removing the display of the Link menu
You can remove the display of the Link menu from your screen by clicking anywhere on the page.

{button ,AL(`H_ACCESSING_A_LINKED_APPLICATION_STEPS',1)} <u>Go to procedure</u>

Accessing a linked application

You can access an external file, application, or Uniform Resource Locator (URL) on the Internet, or run an application using a link you already established.

1. Go to the entry that is linked to the file, application, or URL you want.
2. Click the link next to the entry.

   The Link menu appears. Any link to an external file, application, or URL displays an ... (ellipsis) after the link's description.
3. Click the link's description to the external file, application, or URL you want.

   See details
4. When you finish with the external file, application, or URL, choose File - Exit or switch back to the Organizer window.

Note Some applications don't let you run more than one copy of the application at a single time. If you select a link and nothing happens, the application may already be running.

{button ,AL(`H_ACCESSING_A_LINKED_APPLICATION_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_LINKING_TO_A_URL_ON_THE_INTERNET_STEPS',0)} See related topics

Details: Changing an external file link's description or file name

Changing an external file link's description or file name
You can choose Edit - Organizer Links to change a link you selected. When the File Link dialog box appears, click File Link and make your changes.

Changing an Internet link's description or the file name in other ways
You can choose Edit - Organizer Links to change a link you selected. When the Internet Link dialog box appears, click Internet Link and make your changes.

{button ,AL(`H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS',1)} Go to procedure

Changing an external file link's description or file name

1. Go to the link whose description or file name you want to change.
2. Click the link next to the entry.
3. Click the ... (ellipsis) at the end of the linked item.

   If the link is to an external file or application, the File Link dialog box appears, displaying the link description and file information.

   If the link is to a Uniform Resource Locator (URL) on the Internet, the Internet Link dialog box appears, displaying the link description and file information.
4. Edit the link description or path and file name.

   If necessary, click Browse to see a listing of available files and applications, and then click Open to select the file.

   Note The Browse button isn't available in the Internet Link dialog box.
5. Click OK.

{button ,AL(`H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_EDITING_A_LINK_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_LINKING_TO_A_URL_ON_THE_INTERNET_STEPS',0)} See related topics

Details: Creating links

Creating links in other ways

You can also create a link between two or more selected entries by clicking the first entry you want to link and then holding down CTRL as you click any additional entries you want to link to. Then choose Create - Organizer Link to create a link between two or more selected entries.

You can also press CTRL+L to create a link between two or more selected entries.

Linking entries when you create an entry

You can create a link to an existing entry when you create a new entry.

Hold down SHIFT while you drag and drop the existing entry to the section tab for the new entry. The Create dialog box appears, with a link already set to the existing entry.

{button ,AL(`H_CREATING_LINKS_STEPS',1)} Go to procedure

Creating links

You can create links between discrete pieces of information in different sections in Organizer or between entries in the same section. Creating links lets you cross-reference associated Organizer material. For example, you can link an appointment in your Calendar to a person in your Address section for quick access to that person's phone number.

1. Go to the information you want to link.
2. Click the Link icon in Toolbox.

When you move the mouse pointer over the information you want to link, it changes to .

3. Select the information you want to link.

   The pointer changes to .

4. Locate the information you want to link to, such as an Address record.
5. Click the information you want to link to.

appears next to any linked information.

{button ,AL(`H_CREATING_LINKS_DETAILS',1)} See details

{button ,AL(`H_CREATING_MULTIPLE_LINKS_IN_ORGANIZER_STEPS;H_EDITING_A_LINK_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_LINKING_TO_A_URL_ON_THE_INTERNET_STEPS',0)} See related topics

Details: Creating multiple links in Organizer

Creating multiple links in other ways

You can also create a link between two or more selected entries by clicking the first entry you want to link and then holding down CTRL as you click any additional entries you want to link to. Then choose Create - Organizer Link to create a link between two or more selected entries.

You can also press CTRL+L to create a link between two or more selected entries.

Linking entries to existing entries

You can create a link to an existing entry when you create an entry.

Hold down SHIFT while you drag and drop the existing entry to the section tab for the new entry. The Create dialog box appears, with a link already set to the existing entry.

{button ,AL(`H_CREATING_MULTIPLE_LINKS_IN_ORGANIZER_STEPS',1)} Go to procedure

Creating multiple links in Organizer

You can create links to more than one piece of information. For example, you can create multiple links from an appointment scheduled in Calendar to all the Address records of the people attending the appointment and to a Notepad page that lists the agenda.

1. Go to the information you want to link.
2. Click the Link icon in Toolbox.

When you move the pointer over the information you want to link, it changes to .

3. Select the information you want to link.

   The pointer changes to .

4. Locate the information you want to link to, such as an Address record.
5. Click the information you want to link to.

 appears next to any linked information.

6. (Optional) Repeat steps 1-5 to create more links.

{button ,AL(`H_CREATING_MULTIPLE_LINKS_IN_ORGANIZER_DETAILS',1)} See details

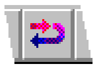
{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_EDITING_A_LINK_STEPS;H_DELETING_A_LINK_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_LINKING_TO_A_URL_ON_THE_INTERNET_STEPS',0)} See related topics

Details: Deleting a link

Deleting links in other ways

You can also delete links by choosing Edit - Organizer Links. From the Organizer Links dialog box that appears, select the link you want to delete and click Delete.

Undoing delete in other ways

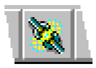
You can also click  to undo deleting a link.

{button ,AL(`H_DELETING_A_LINK_STEPS',1)} Go to procedure

Deleting a link

You can delete any link you create. When you delete links, you don't delete information, you only remove the link.

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



When you move the pointer over the information you want to unlink, it changes to .

3. Click the link next to the entry you want to unlink.

   The Link menu appears, listing any links associated with the selected entry.

4. Click the link you want to delete.

   When the last link to an entry is deleted, no longer appears next to the entry.

Note You can undo a link deletion by choosing Edit - Undo Link Delete before you perform another action.

{button ,AL(`H_DELETING_A_LINK_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_EDITING_A_LINK_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} See related topics

Displaying associated links

Some of your links may have several associated links—that is, links connected to other links, and so on. Organizer lets you see a list of any link's associated links.

1. Go to the link whose associated links you want to see.
2. Select the link's entry.
3. Choose Edit - Organizer Links.

   The Organizer Links dialog box appears.
4. Select the link whose associated links you want to see.
5. Click Follow.

   The associated links appear.
6. Click OK.

{button ,AL(`H_EDITING_A_LINK_STEPS;H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS',0)} See related topics

Details: Displaying a list of links

Using linked pages

It is helpful to link pages that contain related information. Pages may contain many links.

For example, let's say your upcoming marketing event will include keynote speakers. You can include the names of these speakers in your Marketing Event Information chapter and add relevant information about them. To make contacting them easier, you can create links to their addresses in the Address section so you can quickly call them or locate their addresses to correspond with them.

{button ,AL(`H_DISPLAYING_A_LIST_OF_LINKS_STEPS',1)} Go to procedure

Displaying a list of links

You can use a Notepad Links page to display a list of links you make to the Notepad page. For example, you can create a page with links to all the information for one project or to your most commonly used applications.

1. Create a Notepad page.
2. Under "Style," select "Links page."

   See details
3. Click OK.
4. Create links between Organizer entries and the Notepad Links page.

   As you add links to the Notepad Links page, Organizer enters the description of the entry you're linking to the page.
5. (Optional) Click the entry on the page to go to that entry.

Note If you create multiple links to a Notepad page without making the page a Links page, Organizer displays only one link symbol for all the links you create to the Notepad page.

{button ,AL(`H_DISPLAYING_A_LIST_OF_LINKS_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_EDITING_A_LINK_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_LINKING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Changing the order of a link

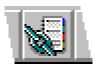
Changing the order of a link in other ways
You can click Up or Down to change the order in which your link entries are listed.

{button ,AL(`H_EDITING_A_LINK_STEPS',1)} Go to procedure

Changing the order of a link

You can edit the order in which your link entries and descriptions appear.

1. Select the linked entry you want to edit.
2. Choose Edit - Organizer Links.



3. Under "Order by," select the order in which you want your link entries and descriptions to appear.
4. Click OK.

{button ,AL(`H_EDITING_A_LINK_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} See related topics

Linking to a file or application

You can link information in Organizer to other files or applications. For example, you can link a scheduled budget appointment to a spreadsheet that contains budget forecasts.

1. Select the Organizer information you want to link.
2. Choose Create - File Link.

3. Under "Link description, " enter a description of the link.
4. Under "File," type the path and file name of the file you want to link to.

   If necessary, click Browse to see a listing of available files and applications, and then click Open to select the file.
5. Click OK.

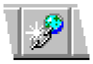
Note To link to an external file with a non-standard extension, first specify the path to the application that the file was created in, followed by a space; then specify the path to the file. For example: C:\wpwin\wpwin.exe D:\organize\sample\mailmrg.prm. Additionally, if you link to an executable file that has a long file name, you must enclose the path and the file name in quotation marks. For example: "C:\windows\Copy of Notepad.exe."

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_LINKING_TO_A_URL_ON_THE_INTERNET_STEPS',0)} See related topics

Linking to a URL address on the Internet

You can link information in Organizer to a Uniform Resource Locator (URL) address on the Internet. For example, you can link a scheduled sales appointment to your client's homepage on the Web.

1. Select the Organizer information you want to link.
2. Choose Create - Internet Link.



3. Under "Link description," enter a description of the URL.
4. Under "URL," enter the URL (the path) to the Internet address you want to link to.

   For example, www.lotus.com.

   Note The URL box already contains "http://." You don't need to enter this information with the Internet address you want to link to unless you inadvertently delete the "http://" text in the "URL" box.
5. Click OK.

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS',0)} See related topics

Details: Navigating through linked information

Understanding Link menu information

A Link menu lists all information that's linked to an entry.

The link description is preceded by a symbol that indicates the Organizer section that the link is in. For example, the symbol indicates the Calendar section.

The at the end of a link description indicates that this linked entry contains additional links. For example, you may have linked a scheduled appointment to more than one Address record.
An ... (ellipsis) after a link description indicates that the link is to an external file, application, or Uniform Resource Locator (URL) on the Internet.

Removing the display of the Link menu

You can remove the display of the Link menu from your screen by clicking anywhere on the page.

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS',1)} Go to procedure

Navigating through linked information

You can see an entry's links in a Link menu. Link menus are rectangular boxes that display a link's description, the Organizer section the linked information is in, and whether the linked entry contains more than one link. Use Link menus to navigate through linked information.

1. Go to the linked entry.
2. Click the link next to the entry.

   One or more rectangular boxes appear, which are the Link menu(s).
3. From the Link menu, click the link you want.

   See details

   If a appears at the end of a linked item, first click the arrow to display additional links; then click the link you want.

Organizer goes to the linked item you select.

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_DETAILS',1)} See details

{button ,AL(`H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_LINKING_TO_A_URL_ON_THE_INTERNET_STEPS',0)} See related topics

Ordering links and link descriptions

Option	Results
User defined	Displays link entries in the order they were created.
Ascending date	Displays link entries in chronological order, oldest entry first.
Link description	Displays link entries in alphabetical order by the first letter of the entry description.
Descending date	Displays link entries in reverse chronological order, newest entry first (default).

Overview: Links

You can create links between discrete pieces of information in different sections in Organizer or between entries in the same section. Creating links lets you cross-reference associated Organizer material.

For example, you can link an appointment in your Calendar to a person in your Address section for quick access to that person's phone number. You can also create multiple links from an appointment scheduled in Calendar to all the Address records of the people attending the appointment and to a Notepad page that lists the meeting's agenda.

In addition to linking information, you can also link Organizer information to other files or applications. For example, you can link a scheduled budget appointment to a spreadsheet that contains budget forecasts.

You can also link Organizer information to a Uniform Resource Locator (URL) address on the Internet. For example, you can link a sales meeting to your client's homepage on the Web.

To keep track of your linked information, you can create a Notepad page with links to all the information for one project or to your most commonly used applications.

Note Creating Organizer links is different from creating OLE links in Organizer. Organizer links are created in all sections of Organizer; OLE links are created in the Notepad section exclusively.

{button ,AL(`;H_CREATING_LINKS_STEPS;H_CREATING_MULTIPLE_LINKS_IN_ORGANIZER_STEPS;H_DELETING_A_LINK_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_EDITING_A_LINK_STEPS',0)} See related topics

Turning to a specific linked entry

Some of your entries may have many links. Organizer lets you see what links an entry has and lets you turn directly to the linked entry, external file, application, or Uniform Resource Locator (URL) you want.

1. Go to the entry whose links you want to see.
2. Select the entry.
3. Choose Edit - Organizer Links.

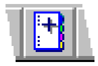
   The Organizer Links dialog box appears.
4. Select the link you want to turn to.
5. Click Turn To.

   Organizer turns to the linked entry, external file, application, or URL you selected.
6. Click Cancel to close the Organizer Links dialog box.

{button ,AL(`H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_DISPLAYING_ASSOCIATED_LINKS_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS',0)} <u>See related topics</u>

Details: Adding a section

Adding a section in other ways

You can also click  to add an Organizer section.

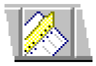
{button ,AL(`H_ADDING_A_SECTION_STEPS',1)} Go to procedure

Aligning your picture on the page

Option	Result
Horizontal Left	Aligns picture along the left side of the page (default).
Horizontal Right	Aligns picture along the right side of the page.
Horizontal Center	Aligns picture in the center of the page.
Vertical Top	Places picture at the top of the page (default).
Vertical Center	Places picture in the center of the page.
Vertical Bottom	Places picture at the bottom of the page.

Changing the size or width of section tabs

1. Choose Section - Customize.

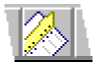


2. Click the Book tab.
3. Under "Tab preferences," select the appropriate options.
4. Click OK.

{button ,AL(`H_ADDING_A_SECTION_STEPS;H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;',0)} See related topics

Changing the color of a section tab

1. Choose Section - Customize.

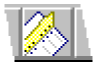


2. Under "Tabs," click the section whose tab you want to change.
3. Click the "Color" box and select the color you want for the section tab.
4. Click OK.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;;H_ADDING_A_SECTION_STEPS',0)} <u>See related topics</u>

Changing the appearance of your binder

1. Choose Section - Customize.



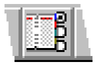
2. Click the Book tab.
3. Under "Binder," click the "Color" box to select the color you want.
4. Click the "Texture" box to select the texture pattern for your binder.
5. Click OK.

{button ,AL(`H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS',0)} See related topics

Changing the font size for all Organizer sections

The font size you select appears throughout your Organizer section.

1. Choose Section - Customize.



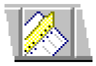
2. Click the Fonts tab.
3. Under "Font Size," select the appropriate options.
4. Click OK.

Note Using Section - Customize and the Fonts tab changes the font size for all of your entries in all sections; however, in Notepad, you can change font sizes and the appearance of any selected text without affecting other Organizer sections.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_DISPLAY_OPTIONS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS;H_CHANGING_THE_DISPLAY_OF_LINKS_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_DATE_AND_TIME_DISPLAY_STEPS',0)} See related topics

Changing the name of a section

1. Choose Section - Customize.



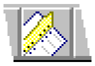
2. Under "Tabs," select the section whose name you want to change.
3. Click Rename.
4. For "New name," enter the new name you want to assign to the section.
5. Click OK.

   The new section name appears under "Tabs."
6. Click OK.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;',0)} See related topics

Changing the order of sections

1. Choose Section - Customize.



2. Under "Tabs," select the section you want to move.
3. Click Up or Down.

   The section moves up or down in the list.
4. Click OK.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;',0)} See related topics

Details: Placing a picture on a section-tab page

Selecting the front or back side
Each section-tab page has a front and back side. You can place a picture on either the front or the back side or both. The default is to display the settings for the Front picture. If you placed a picture on the back side, select "Back" to see the settings.

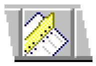
Selecting the picture source
You can select a picture from a file or from Clipboard. If you select a picture from a file, the file must be on one of your available paths. (The default is no picture.) Once you select a picture, the default changes to keep the current picture.

{button ,AL(`H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS',1)} Go to procedure

Placing a picture on a section-tab page

You can place a picture on a section-tab page from a file on any of your available paths or from a bitmap you've pasted to Clipboard.

1. Choose Section - Customize.



2. Under "Tabs," select the section-tab page you want the picture to appear on.

   For example, if you want your picture to appear on the To Do section-tab page, select "To Do."
3. Click Picture.
4. Under "Side," select "Front" or "Back" for which side of the page you want the picture to appear on.

   See details
5. Under "Get picture from," select an option for where the picture will come from.

   If necessary, click Browse to select a file.
6. Under "Position," select an option for where you want the picture to appear on the page.
7. Under "Sizing," select the appropriate options.
8. Click Align to select the appropriate options to align the picture on the section-tab page.
9. Click OK to confirm your options.
10. Click OK to confirm your selections.
11. Click OK.

{button ,AL(`H_CHANGING_THE_PICTURE_FOR_A_SECTION_DETAILS',1)} See details

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;',0)} See related topics

Changing the font size for all Organizer sections

Option	Result
Default	Displays text in 8 point size.
Medium	Displays text in 10 point size.
Large	Displays text in 12 point size.
Scale with window size	For any font size you select, this setting maintains the correct shape and proportion of all text you enter.

Opening your binder to a section

You can choose where you want your binder to open each time you open your Organizer file.

1. Choose Section - Customize.

2. Click the Book tab.
3. Click the "Open to" box and select where you want to open to.

   The default is to open to Today in Calendar or to the Organizer front cover, if no Calendar section exists.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;',0)} See related topics

Overview: Customizing your Organizer binder and sections

You can customize your Organizer binder and sections in a number of ways. You can do the following activities:

- Add, remove, or rename sections.
- Include sections from other Organizer files.
- Change the order of sections.
- Change the color and size of section tabs.
- Place pictures on section-tab pages.
- Change the color and texture pattern of your binder.
- Open to the section you want each time you open the file.
- Change the font size that appears throughout your Organizer sections.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;',0)} See related topics

Selecting the picture position

Option	Result
Logo area	Places the picture within the top portion, the logo area, of the page.
Whole page	Places the picture within the whole page.

Selecting the picture source

Option	Result
File	Selects a picture from a file on one of the available paths.
Clipboard	Selects the picture you pasted to Clipboard.
Default	Selects no picture.
Keep current	Keeps the current picture.

Sizing the picture for a section

Option	Result
Original size	Maintains the original size of the picture.
Fit to page	Enlarges the picture to fit within the page margins.
Percentage	Scales the file picture reduced or enlarged by the percent you specify. (100% is the default.)
Maintain aspect ratio	Maintains the shape and proportion of the graphics so that the picture doesn't distort when its original size is enlarged or reduced.

Using section tabs

Option	Results
Size to name	Makes the section tab only as large as the section name (default).
Overlap by	Overlaps the section tabs the amount you specify. (15% is the default.)
Width	Makes the width of the section tabs narrow, medium (default), or wide.

Adding a section

To add a section in your Organizer, you must at least have Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile. See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

1. Choose Section - Customize.
2. Under "Tabs," click a section.

   The new section (and its tab) will appear after the section you selected.
3. Click Add.
4. Click the "Section type" box and select the type of section you want to add.

   Note You can't add a new, blank Address section. However, if you create an additional Personal Name and Address Book using the PERNAMES.NTF template in Notes, you can include the new Name and Address Book as an additional Address section in Organizer. See the Notes Help system for information on creating a new Personal Name and Address Book.
5. For "Section name," enter a name for the section you want to add.
6. Click OK.

   The new section name appears in the list under "Tabs."
7. Click OK.

Tip You can create an unlimited number of sections in one Organizer file, provided the file doesn't exceed the maximum Notes mail file size, which the system administrator can control. For more information on maximum file size, see Notes Help.

{button ,AL(`H_ADDING_A_SECTION_DETAILS',1)} See details

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS',0)} See related topics

Details: Including sections from other user's Organizer files

Getting access to someone else's file

You can include a section from another user's Notes mail file if you have the appropriate access level privileges in the other user's mail file. Your privileges also determine whether you can make changes to the included section.

The owner of the file you want to access uses the Delegation Profile in Notes to allow other users to read or manage their information in Organizer. To display the Delegation Profile, in your mail file in Notes, choose Actions - Calendar Tools - Calendar Profile to display the Notes Calendar Profile and click "Allow other users to view your calendar."

If the owner selects "Everyone can read my Calendar" in the Delegation Profile, you can include sections from their file to an Organizer binder, but you can't create entries in the section you include.

Note With this access, if you add the other user's Calendar section to your Organizer binder, you can display the calendar in Multiple Calendar view, but you can't create appointments or respond to meeting invitations.

If the owner selects "Everyone can manage my Calendar," you can include sections from the other user's file and create entries in those sections. In the Calendar section, you can also schedule meetings and respond to meeting invitations for the owner. The owner can also specify only certain users who can read or manage their Organizer information.

Note If you want to use filters in the section you include from another user's mail file, the owner of the file must grant you Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile.

See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

Including a section by user name

You can either enter the user name or select the user name from the list.

As you enter a user name in the "File name" box, Organizer attempts to match the letters you enter with names in the list and supply the rest of the name. You can also change the Address Book. Click the "Address" box and make your selection.

Including a section by database name

Under "Server," you can select the Notes server where the file you want to include from is located. Choose "Local" (default) to specify a file located on your own computer. Under "Database," enter the name of the file you want to open (for example, EMurray.NSF). Organizer can only open files located in the subdirectory specified in Notes User Preferences under "Local database folder." The default is typically the Notes \DATA directory (for example, C:\NOTES\DATA).

To change or view Notes User Preferences, in Notes, choose File - Tools - User Preferences. See Notes Help for more information on User Preferences.

Selecting a section

If no sections appear after you selected a name, you don't have the correct access rights to that user's file.

If you include another user's calendar in your file, Organizer lets you display two or more calendars side by side using Multiple Calendar view. Organizer displays multiple calendars in Day per Page, time slot view.

Including Address sections

By default, Organizer 97 GS uses the Notes Personal Name and Address Book (NAMES.NSF), located on you local hard drive (typically in your Notes \DATA directory, for example, C:\NOTES\DATA) to store Organizer Address information. To include an additional Address section, in Notes, create an additional local Personal Name and Address Book using the PERNAMES.NTF template. Give the new Address book a different name (for example, NAMES_2.NSF), and then include the new Address book in your Organizer.

Understanding how Organizer shares sections

By default, Organizer saves your file after each change.

If the information in an included section changes in the originating file, you'll see the change in the included section of your Organizer the next time you turn to that page.

{button ,AL(`H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS',1)} Go to procedure

Including sections from other Organizer files

If you possess access rights to another user's file, you can include sections from that user's file in your own file, so that each time you open your own file you also open the other user's section. By including sections, you can share information among many users. For example, if you're an assistant, you may want to include your manager's To Do section in your file along with your own To Do section. If you're including a section from a password-protected file, you may be prompted for the password.

Caution When you share sections with others, you need to coordinate access times with the people who have access to your file. If two people work on the same file at the same time and both people edit the same entry, the last person's edits will overwrite those of the first person.

1. Verify that the person whose section you want to include has given you access to read or manage their calendar.

   See details

2. Choose Section - Include.

3. For "From," enter the user name of the person whose mail file you want to include a section from, or enter a database name.

   Click Browse to see a list of files by user name or to specify a file by server and database name.

   See details

4. In the "Section" box, select the section you want to include.

   See details

5. (Optional) For "Tab name," enter a name for the section (for example, Manager's To Do).

   See details

6. Click OK.

Note Organizer also lets you display two or more calendars side by side using Multiple Calendar view. For example, you can review your calendar and another user's calendar at the same time. Organizer displays multiple calendars in Day per Page, time slot view.

{button ,AL(`H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_DETAILS',1)} See details

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS;H_OVERVIEW_ACCESS_CONTROL_OVER;',0)} See related topics

Removing a section

To remove a section in your Organizer, you must at least have Editor access with the right to "Create shared folders/views" in the Notes mail file. You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile. See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

1. Choose Section - Customize.
2. Under "Tabs," select the section you want to remove.
3. Click Remove.

   You will be prompted to confirm or cancel your action.

   Caution Be sure to remove the correct section. All information within the section you remove, except an Address section, will be deleted and can't be recovered.

   Note Address sections are included from a Notes Personal Name and Address Book, located on your local hard drive (for example, C:\NOTES\DATA\NAMES.NSF). If you remove an Address section, you're only removing an included section; the information remains in the original Personal Name and Address book, and you can re-include the section if you want.
4. Click Yes to remove the section.

   The section you removed is no longer listed under "Tabs."
5. Click OK.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_REMOVING_A_PASSWORD_STEPS',0)} See related topics

Adding contacts from the same company in an Address record

You can include more than one contact at the same company. Organizer copies company information from one Address record to another so you don't have to re-enter the same information.

1. Create a new Address record.
2. Enter your contact's name.
3. Enter the company name.
4. Press TAB.

   The Similar Address Found dialog box appears.
5. Under "Copy details from," select the company you want.
6. Click OK.

   Organizer automatically fills in the address, zip code, phone number, and fax fields for the new Address record.
7. Click OK.

Tip To create additional Address records, click Add before you click OK. When you finish entering your Address records, click OK.

{button ,AL(`H_SORTING_ADDRESSES_STEPS;H_COPYING_A_FIELD_FROM_ONE_ADDRESS_RECORD_TO_ANOTHER_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS;',0)} See related topics

Details: Changing preferences in Address

Changing your Address preferences
You can change any Address preferences so that your Address information appears and functions the way you want. You can also change Address preferences as frequently as you want.

Using the & (ampersand) to create keyboard shortcuts in field labels
The & (ampersand) in a label for a field indicates that you can access the field with a keyboard shortcut. Keyboard shortcuts help you do things quickly. When you view the "Fields" list, you'll see that all fields contain an &, for example, &Title. (You'll see this when you select a field and look at the "Label" box.) The letter that follows the & is the keyboard shortcut. This means that when you press ALT+T while you're in an Address record, the cursor will move directly to the Title field.

To assign a field a keyboard shortcut, type & before the letter that will serve as the keyboard shortcut in the "Label" box. Don't use a letter that is already assigned as a keyboard shortcut in another Address record field.

Selecting the type of Address record template you want to appear in front: business or home
Organizer provides you with two different address templates: business and home. The templates look like address cards with tabs.

Depending on the type of address you enter most frequently, it's useful to have the template you use most often always appear in front. The Foreground tab sets where the business or the home address template appears: always in front or always in back.

If you enter both business and home Address records equally, click the "Foreground" box to select "Selected." "Selected" keeps track of the type of address template you last selected for each particular person, and every time you look up that person's Address record, the address template you last selected for that person will be in front. For example, if you last selected a business Address record for Jim Cooke and last selected a home Address record for Lilly Coppins, and you used "Selected" as your Foreground tab, the business Address record will appear in front for Jim Cooke's Address record, and the home Address record will appear in front for Lilly Coppins' Address record.

Changing a format for a country
You can change what format appears for a country by selecting another format from the "Default envelope/label format" box.

When you change the address format for a country, all Address records associated with that country will use the most recent format you select. For example, let's say that last month you created an Address record for a colleague in Scotland. Yesterday, you selected a new address format for Scotland; therefore, the Address record you created last month will adopt the address format selection you made yesterday.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS',1)} Go to procedure

Changing preferences in Address

Address preferences determine how your Address records are sorted and what information appears with them. Changing preferences is optional; if you don't change your Address preferences, Organizer uses the default preferences.

1. Go to the Address section and choose View - Address Preferences.

   See details
2. Under "View," select the option for what you want to appear with your Address records.
3. Under "Sort by," select the option you want to use to sort your addresses in the current Address section.
4. Under "Options," select the appropriate options you want to appear with your Address section.
5. Click the "Default envelope/label format" box and select the format you want.
6. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_DETAILS',1)} See details

{button ,AL(`H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_SORTING_ADDRESSES_STEPS;H_CHANGING_THE_VIEW_OF_ADDRESS_RECORDS_STEPS;H_CHANGING_THE_ADDRESS_ENVELOPE_AND_OR_LABEL_FORMAT_STEPS;H_DELETING_AN_ADDRESS_RECORD_STEPS;H_EDITING_AN_ADDRESS_RECORD_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS',0)} See related topics

Details: Changing the address envelope and/or label format

Changing a format for a country

You can change what format appears for a country by entering a country in the "Change format for" box and selecting another format from the "Address format" box.

When you change the address format for a country, all Address records associated with that country will use the most recent format you select. For example, let's say that last month you created an Address record for a colleague in Scotland. Yesterday, you selected a new address format for Scotland; therefore, the Address record you created last month will adopt the address format selection you made yesterday.

Selecting a format

As you scroll through the choices in the "Address format" box, you'll see the countries associated with each format. For example, Format 3 is associated with Finland and Switzerland, Format 8 is associated with Sweden, and so on. When you select a format for a country, the name of the country you select becomes associated with that format and appears in the countries using this format list.

{button ,AL(`H_CHANGING_THE_ADDRESS_ENVELOPE_AND_OR_LABEL_FORMAT_STEPS',1)} Go to procedure

Changing the address envelope and/or label format

You can change how address envelope labels appear.

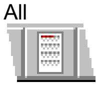
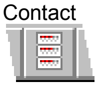
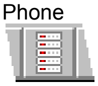
1. Choose Address - Change Envelope/Label Format.
2. For "Change format for," enter the country whose envelope and/or label you want to change.
   See details
3. Click the "Address format" box and select the format you want.
4. Click OK.

{button ,AL(`H_CHANGING_THE_ADDRESS_ENVELOPE_AND_OR_LABEL_FORMAT_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_SORTING_ADDRESSES_STEPS',0)} See related topics

Viewing Address records

The View icons in this table appear in Toolbox. You can click an icon instead of choosing the command.

Command	Result
All 	Shows all the information associated with the Address record.
Address 	Shows the name, job title, company, address, telephone number, and fax number in the Address record (default).
Contact 	Shows the name, telephone number, fax number, and e-mail address in the Address record.
Phone 	Shows the name and telephone number in the Address record.

Viewing Addresses

View options let you display different kinds of information associated with each of your Address records. At any time, you can change how you want to view your Address records.

1. Go to the Address section.
2. Choose View.
3. Choose one of the following commands: All, Address, Contact, or Phone.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS;H_SORTING_ADDRESSES_STEPS',0)} See related topics

Customizing the appearance and function of your Address section

Option	Result
Foreground tab	Places either the Business sort tab (default), the Home sort tab, or the Selected sort tab in front.
Start headings	Places your address headings starting on the right page (default), one after another on the same page, each heading starting at the top of the next page, or each heading starting on the left page.
Show address tabs	Shows (default) or doesn't show the Address business or home tabs.
Show index line	Shows (default) or doesn't show the index line. The index line is the information that you selected to sort by. It appears above the Address record.
Show	Shows or doesn't show (default) a symbol indicating that you made your entry confidential.
Turn to entry after Create/Edit	Goes (default) or doesn't go to the page your Address record is on after you create or edit an Address record.

Note Under Options, you can select the following symbol to show information about an Address record. This symbol appears with the Address record, when you made an Address record confidential.

Symbol	Result
	Indicates that an Address record is confidential.

Details: Deleting an Address record

Deleting an Address record in other ways
You can also select an Address record and then choose Edit - Cut, Edit - Clear, or click  to delete an Address record.

Keyboard shortcuts
You can also select an Address record and then press CTRL+X or press DEL to delete an Address record.

{button ,AL(`H_DELETING_AN_ADDRESS_RECORD_STEPS',1)} Go to procedure

Details: Editing an Address record

Keyboard shortcuts
You can also select an entry and press CTRL+E to edit an Address record.

Editing Address records in other ways
You can also select an entry and choose Edit - Edit Address to edit an Address record.

Editing the existing text of your Address record
To edit the existing address text, click the Address record to select it, click the text you want to edit, and make your changes. When you're done editing, press F2 to enter your changes. When the Edit Address dialog box appears, make your changes, and click OK.

Adding information to Address records you previously left blank
If you want to add information in fields you previously left blank, you must do that in the Edit Address dialog box. Choose Edit - Edit Address.

{button ,AL(`H_EDITING_AN_ADDRESS_RECORD_STEPS',1)} Go to procedure

Details: Editing field names in Address records

Changing a field name

You can edit any field name in Address records. When you click Fields, the Field Labels dialog box appears that lists every assigned field name. When you select the field name you want to change, it appears in the "Label" box. Enter the new field name in its place by editing what is there. The changes you make to field names affect the template and will appear in all of your Address records in the current Address section.

Let's say your business associates use two business phone lines: a direct line and a switchboard line. Instead of naming field names Tel 1 and Tel 2, rename them Direct line and Switchboard.

Using the & (ampersand) to create keyboard shortcuts in fields

The & (ampersand) in a field name indicates that you can access the field with a keyboard shortcut. Keyboard shortcuts help you do things quickly. When you view the Field list, you'll see that all field labels contain an &, for example, &Title. The letter that follows the & is the keyboard shortcut. This means that when you press ALT+T from within an Address record, the cursor will move directly to the Title field.

To assign a field a keyboard shortcut, type & before the letter that will serve as the keyboard shortcut. Don't use a letter that is already assigned as a keyboard shortcut in another Address record field.

{button ,AL(`H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS',1)} Go to procedure

Editing field names in Address records

1. Choose View - Address Preferences.
2. Click Fields.
3. Select the field name you want to change.

   See details
4. Under "Label," enter the new field name.
5. Click OK to confirm the new field.
6. Click OK.

{button ,AL(`H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_DETAILS',1)} See details

{button ,AL(`H_EDITING_AN_ADDRESS_RECORD_STEPS;H_ENTERING_BUSINESS_ADDRESS_INFORMATION_STEPS;H_ENTERING_HOME_ADDRESS_INFORMATION_STEPS',0)} See related topics

Entering business address information

Option	Result
Job title	Adds the employee's job title to the Address record.
Company	Adds the company name to the Address record.
Street	Adds the company street address to the Address record.
City	Adds the company's city name to the Address record.
State	Adds the company's state name to the Address record.
Zip	Adds the company's zip code number to the Address record.
Country	Adds the company's country name to the Address record.
Tel 1	Adds the employee's telephone number to the Address record.
Ext	Adds the employee's telephone extension number to the Address record.
Fax	Adds the employee's fax number to the Address record.
E-mail	Adds the employee's e-mail address to the Address record.
Tel 2	Adds a second telephone number to the Address record.
Assistant	Adds the employee's assistant's name to the Address record.
Notes	Adds any notes about employee, company, and so on to the Address record.
Categories	Adds any categories associated with employee or company to Address record.
Confidential	Makes Address record confidential so others accessing your files can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Entering home address information

Option	Result
Street	Adds the street address to the Address record.
City	Adds the city name to the Address record.
State	Adds the state name to the Address record.
Zip	Adds the zip code number to the Address record.
Country	Adds the country name to the Address record.
Tel 1	Adds the person's telephone number to the Address record.
Fax	Adds the person's fax number to the Address record.
Tel 2	Adds a second telephone number to the Address record.
E-mail	Adds the person's e-mail address to the Address record.
Unused1	Adds to Address record any information you enter here, for example: Plumber.
Unused2	Adds to the Address record any information you enter in this field, for example, "Mary Downing's referral."
Spouse	Adds the spouse's name to the Address record.
Children	Adds the children's names to the Address record.
Notes	Adds notes you want associated with Address record, for example, "Punctual."
Categories	Adds any categories you want assigned to the particular Address record, for example, "Home Maintenance."
Confidential	Makes Address record confidential so others accessing your files can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Details: Creating an Address record

Creating Address records in other ways
You can also choose Create - Address or press INS when you're in the Address section to create an Address record.

Entering name and title information
When you enter a name in the Address record, you can assign the title Ms., Mr., Prof., and so on. Click the "Title" box to select the title you want.

Additional information for creating Address records
There are a number of Address record fields that you can use to personalize your entries, for example, Notes, Spouse, Children, and Categories. You can use Unused1 and Unused2 in ways that are most useful for you. For example, you can add notes to an Address record field to remind yourself of something; or you can include occupational titles in the Unused fields, such as child-care provider or piano instructor. You can assign categories to your Address record, such as "Home Maintenance," "Emergency," and so on. Any change you make to a field name affects that field for all Address records in that Address section.

Tip Press TAB to move between fields in an Address record.

{button ,AL(`H_INSERTING_AN_ADDRESS_RECORD_STEPS',1)} Go to procedure

Selecting address envelope and/or label formats

Format	Countries	Format	Countries
1	United States, Canada (English), Australia	14	Korea
2	France, Spain	15	Russia
3	Belgium (Flemish), Finland, Switzerland	16	China
4	Croatia, Serbia, Slovenia, Czech Republic, Latin America, Poland, Romania	17	Bulgaria
5	Denmark (Internal), The Netherlands	18	Canada (French)
6	United Kingdom, Ireland	19	Italy
7	Norway	20	Malaysia
8	Sweden	21	Turkey
9	Brazil	22	Hungary
10	Germany (Internal)	23	Belgium (French)
11	Greece	24	Iceland (Internal)
12	Austria (Internal)	25	Portugal
13	Japan	26	Germany

Selecting the sort order of Address records

Option	Result
Last name	Sorts your Address records alphabetically by last name (default).
Company	Sorts your Address records alphabetically by company name.
Category	Sorts your Address records alphabetically by category.
Zip	Sorts your Address records by zip code (default) or by any of the other fields you select through this option, such as title, company, and so on.

Selecting what you see with your Address records

View options let you see different kinds of information associated with each Address record.

Option	Result
All	Shows all the information associated with the Address record.
Address	Shows (default) the name, title, company, address, telephone number, and fax number in the Address record.
Contact	Shows the name, telephone number, and fax number in the Address record.
Phone	Shows the name and telephone number in the Address record.

Details: Sorting Addresses

Sorting by category

When you sort by category, Address record page tabs are sorted alphabetically (A through Z), and include # for Address records you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.

{button ,AL(`H_SORTING_ADDRESSES_STEPS',1)} Go to procedure

Sorting addresses

You can sort Address records by last name, company, category, and Address record fields. At any time, you can change how you want to sort your Address records.

1. Go to the Address section.
2. Choose View.
3. Choose one of the following commands: By Last name, By Company, By Zip, or Category.

{button ,AL(`H_SORTING_ADDRESSES_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS',0)} See related topics

Sorting Address records

Command	Result
By Last name	Sorts (default) your Address records alphabetically by last name.
By Company	Sorts your Address records alphabetically by company name.
By Zip	Sorts your Address records by zip code (default) or by any of the other fields you select through this option, such as title, company, and so on.
Category	Sorts your Address records alphabetically by category.

Address layouts

Address Card	Full Address Card
Address Card (Rolodex)	Label
Contact Card	Phone List
Envelope	

Anniversary layouts

Anniversary List	Daily Trifold Deluxe Timeline
Daily Trifold Deluxe List	Monthly Anniversary

Calls layouts

Calls Card	Daily Trifold Deluxe List
Calls List	Daily Trifold Deluxe Timeline
Daily Calendar/To Do/Calls	Monthly Calls

Details: Mapping sections

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout part
The parts of the layout are the different areas in which each section's information is printed. Under "For part of layout," select the part to which you want to map a section. For example, if your Organizer file has both your To Do section and your manager's To Do section, select the To Do part. The "Use information from" box now shows both To Do sections. Select the To Do section you want to print.

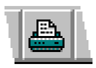
{button ,AL(`H_MAPPING_SECTIONS_STEPS',1)} <u>Go to procedure</u>

Mapping sections

You can add and create additional sections of Organizer. If you added an Organizer section, you'll have more than one of the same section. For example, let's say you included both your manager's and your own To Do sections in your Organizer file, or you added a personal Address section to the Address section already in Organizer. If you're printing just one of these sections, you can select the section you want to print.

However, if you choose a trifold layout, you need to specify (map) which section (your To Do tasks or your manager's To Do tasks) you want to print. If you don't specify mapping, Organizer prints each section that appears first in the Organizer file. That is, if your To Do tab appears before the To Do tab for your manager, Organizer will print your To Do tasks unless you map the manager's To Do tasks as the section to print.

1. Choose File - Print.



2. Click the "Section" box and select the Calendar, To Do, Planner, or Anniversary section.
3. Click the "Layout" box and select one of the layouts.
4. Click Sections.

   Note If Sections (in the Print dialog box) is dimmed, you didn't select a print layout that combines information from more than one section. Click the "Layout" box and select a layout.
5. Under "For part of layout," select the part of the layout to which you want to map a section.

   See <u>details</u>
6. Under "Use information from," select the section you want printed.
7. Click OK to return to the Print dialog box.
8. Click OK to start printing.

{button ,AL(`H_MAPPING_SECTIONS_DETAILS',1)} <u>See details</u>

{button ,AL(`H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_INFORMATION_FOR_DIFFERENT_DATEBOOKS_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_DIFFERENT_LAYOUTS_STEPS',0)} <u>See related topics</u>

Notepad layouts

Notepad Contents
Notepad Pages
Notepad Contents and Pages

Overview: Paper types

When you're ready to print, you'll select the Organizer section you want to print (or any information from the section), the layout (or how you want your information to appear on the printed output), and the paper type (or the paper size) you want to print to. When you select a paper type, you're choosing the size and style of the paper upon which your information will appear. For example, you can select a paper size, such as an 8 1/2 x 11" letter paper size, a Rolodex card size, an 8 1/2 x 14" legal paper size, or you can customize a paper size. If you decide to customize your paper type, you can adjust the paper size, margins, spacing, and more.

The following table lists all Organizer paper types:

2x10-Labels 1 x 4 in	DayRunner-Classic
2x3-Labels 3 1/3 x 4 in	DayRunner-Entrepreneur
2x4-Rolodex 2 1/6 x 4 in	DayRunner-Running Mate
2x5-Labels 2 x 4 in	Day-Timer Junior Desk
2x7-Labels 1 1/3 x 4 in	Day-Timer Junior Pocket
3x10-Labels 1 x 2 5/8 in	Day-Timer Senior Desk
A4 210 x 297 mm	Day-Timer Senior Pocket
A5 148 x 210 mm	Envelope #10 4 1/8 x 9 1/2 in
Avery #41207 3 3/4 x 6 3/4 in - Portrait	Envelope #9 3 7/8 x 8 7/8 in
Avery #41257 3 3/4 x 6 3/4 in - Landscape	Franklin Day Planner Classic - Portrait
Avery #41308 5 1/2 x 8 1/2 in - Portrait	Franklin Day Planner Classic - Landscape
Avery #41358 5 1/2 x 8 1/2 in - Landscape	Franklin Day Planner Monarch
Avery L7159 (24)	Legal 8 1/2 x 14 in
Avery L7162 (16)	Letter 8 1/2 x 11 in
Avery L7163 (14)	Time Manager
Avery L7666	
Avery L7901 (Filofax)	
Avery L7902 (A5)	
B5 176 x 250 mm	

Overview: Printing your Organizer information

Organizer lets you print your Organizer information (or the entries you created) in a variety of professional ways: you can print your work to fit a day-planner you use (for example, a Franklin Day Planner Classic or DayRunner Classic), or you can customize your own look. You can combine information from several Organizer sections, print only one section, or print parts of a section. Organizer provides you with many options for how to print your Organizer information.

You can also print Organizer information to take with you when you travel. For example, you can carry your Organizer information in a paper day-planner in order to keep track of your appointments, tasks, addresses, calls, events, notes, and special dates, or you can print only your day's appointments and responsibilities, so you can take them to a meeting.

When you're ready to print, you'll select the Organizer section you want to print (or any information from the section), the layout (or how you want your information to appear on the printed output), and the paper type (or the paper size) you want to print to.

{button ,AL(`H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER;H_OVERVIEW_PRINT_LAYOUTS_OVER;H_OVERVIEW_PAPER_TYPES_OVER;',0)} See related topics

Paper types available in Organizer

2x10-Labels 1 x 4 in

2x3-Labels 3 1/3 x 4 in

2x4-Rolodex 2 1/6 x 4 in

2x5-Labels 2 x 4 in

2x7-Labels 1 1/3 x 4 in

3x10-Labels 1 x 2 5/8 in

A4 210 x 297 mm

A5 148 x 210 mm

Avery #41207 3 3/4 x 6 3/4 in - Portrait

Avery #41257 3 3/4 x 6 3/4 in - Landscape

Avery #41308 5 1/2 x 8 1/2 in - Portrait

Avery #41358 5 1/2 x 8 1/2 in - Landscape

Avery L7159 (24)

Avery L7162 (16)

Avery L7163 (14)

Avery L7666

Avery L7901 (Filofax)

Avery L7902 (A5)

B5 176 x 250 mm

DayRunner-Classic

DayRunner-Entrepreneur

DayRunner-Running Mate

Day-Timer Junior Desk

Day-Timer Junior Pocket

Day-Timer Senior Desk

Day-Timer Senior Pocket

Envelope #10 4 1/8 x 9 1/2 in

Envelope #9 3 7/8 x 8 7/8 in

Franklin Day Planner Classic - Portrait

Franklin Day Planner Classic - Landscape

Franklin Day Planner Monarch

Legal 8 1/2 x 14 in

Letter 8 1/2 x 11 in

Time Manager

Planner layouts

Daily Trifold Deluxe List	Planner List
Daily Trifold Deluxe Timeline	Quarterly Planner
Monthly Planner	Yearly Planner

Details: Printing names and addresses

Keyboard Shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected. For example, the layouts for addresses include envelope, label, and phone list.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, or a customized paper type, such as Rolodex cards, Avery labels, or Franklin DayPlanner.

To see an illustration of the paper you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

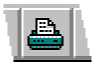
Double-sided printing prints on both the front and back of the paper. If you select "Double sided," click Options. Under "Double sided," select the appropriate option.

{button ,AL(`H_PRINTING_ADDRESS_RECORDS_STEPS',1)} Go to procedure

Printing names and addresses

Organizer prints names and addresses in the order in which you sorted them. Set the sort order you want before you start printing.

1. Choose File - Print.



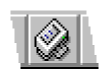
2. Click the "Section" box and select Address or Name.
3. Click the "Layout" box and select a layout for how you want the printed information to appear.

   See details
4. If necessary, click the "Paper" box and select a paper type.

   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Click Layouts.
7. Under "Preferences," select the appropriate options to specify how much of the address information you want printed.
8. Click OK to return to the Print dialog box.
9. Under "Range," select the option for the address records you want to print.
10. (Optional) For "Copies," enter the number of copies you want to print: 1 - 99.

    You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select "Collated."
11. Click OK to start printing.

Tip You can also print an Organizer entry by dragging and dropping the entry to  in Toolbox.

{button ,AL(`H_PRINTING_ADDRESS_RECORDS_DETAILS',1)} See details

{button ,AL(`H_SORTING_ADDRESSES_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_CHANGING_THE_ADDRESS_ENVELOPE_AND_OR_LABEL_FORMAT_STEPS;',0)} See related topics

Details: Printing anniversaries, birthdays, and other special dates

Keyboard Shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists the layouts designed for the Anniversary section. There are four Anniversary layouts: "Anniversary List," "Daily Trifold Deluxe List," "Daily Trifold Deluxe Timeline," and "Monthly Anniversary."

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, labels, or customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select "Double sided," click Options. Under "Double sided," select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under "For part of layout," select the part of the layout to which you want to map a section. Under "Use information from," select the section whose entries you want printed in the layout part you just selected.

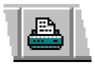
If you don't specify mapping, Organizer prints each section that appears first in your Organizer. For example, Organizer would print your To Do section if its tab appears first, or your manager's To Do section if your manager's tab appears first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the trifold layout. Select another layout.

{button ,AL(`H_PRINTING_ANNIVERSARIES_STEPS',1)} Go to procedure

Printing anniversaries, birthdays, and other special dates

1. Choose File - Print.



2. Click the "Section" box and select "Anniversary."
3. Click the "Layout" box and select a layout for how you want the printed information to appear.

   See details
4. If necessary, click the "Paper" box and select a paper type.

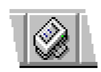
   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Under "Range," select the option for the range of dates you want to print.
7. (Optional) For "Copies," enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select "Collated."
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections to specify how you want to map the Organizer sections and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section.

   See details
9. Click OK to start printing.

Tip You can also print an Organizer entry by dragging and dropping the entry to  in Toolbox.

{button ,AL(`H_PRINTING_ANNIVERSARIES_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing information in any Organizer section

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Printing shown-through entries
If you're printing the Calendar section and you've selected to show through entries from the To Do, Calls, Planner, or Anniversary section in Calendar, you can print the shown-through items along with your appointments. To do this, select one of the following layouts: "Monthly Calendar," "Daily Page," or "Weekly 2-Page."

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several sections on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Calls, Planner, and Anniversary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, labels, or customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select "Double sided," click Options. Under "Double sided," select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under "For part of layout," select the part of the layout to which you want to map a section. Under "Use information from," select the section whose entries you want printed in the layout part you just selected.

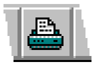
If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the trifold layout. Select another layout.

{button ,AL(`H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',1)} Go to procedure

Printing information in any Organizer section

1. Choose File - Print.



2. Click the "Section" box and select the Organizer section that has the entries you want to print.
3. Click the "Layout" box and select a layout for how you want the printed information to appear.

   See details
4. If necessary, click the "Paper" box and select a paper type.

   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Under "Range," select the option for the range of information you want to print.
7. (Optional) For "Copies," enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select "Collated."
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer sections, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section.

   See details
9. Click OK to start printing.

Tip You can also print an Organizer entry by dragging and dropping the entry to  in Toolbox.

{button ,AL(`H_PRINTING_ANY_ORGANIZER_SECTION_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;',0)} See related topics

Details: Printing your daily, weekly, or monthly calendar

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Printing shown-through entries
If you've shown entries from the To Do, Calls, Planner, or Anniversary section in Calendar, you can print the shown-through items along with your appointments. To do this, select one of the following layouts: "Monthly Calendar," "Daily Page," or "Weekly 2-Page."

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several sections on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Calls, Planner, and Anniversary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be standard 8 1/2 by 11" paper, or customized paper for a hardcopy datebook, such as the Franklin DayPlanner or DayRunner Running Mate.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select "Double sided," click Options. Under "Double sided," select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, If you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under "For part of layout," select the part of the layout to which you want to map a section. Under "Use information from," select the section whose entries you want printed in the layout part you just selected.

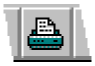
If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the trifold layout. Select another layout.

{button ,AL(`H_PRINTING_CALENDAR_APPOINTMENTS_STEPS',1)} Go to procedure

Printing your daily, weekly, or monthly calendar

1. Choose File - Print.



2. Click the "Section" box and select "Calendar."
3. Click the "Layout" box and select the layout for how you want the printed information to appear.

   See details
4. If necessary, click the "Paper" box and select a paper type.

   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Under "Range," select the option for the range of information you want to print.
7. (Optional) For "Copies", enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select "Collated."
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer sections and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section.

   See details
9. Click OK to start printing.

Tip You can also print an Organizer entry by dragging and dropping the entry to  in Toolbox.

{button ,AL(`H_PRINTING_CALENDAR_APPOINTMENTS_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing Calls entries

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected. For example, the layouts for Calls entries include Calls Card, Calls List, and Monthly Calls.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, labels, or customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select "Double -sided," click Options. Under "Double sided," select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under "For part of layout," select the part of the layout to which you want to map a section. Under "Use information from," select the section whose entries you want printed in the layout part you just selected.

If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the trifold layout. Select another layout.

{button ,AL(`H_PRINTING_CALLS_STEPS',1)} Go to procedure

Printing Calls entries

1. Choose File - Print.
2. Click the "Section" box and select"Calls."
3. Click the "Layout" box and select the layout for how you want the printed information to appear.

   See details
4. If necessary, click the "Paper" box and select a paper type.

   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Under "Range," select the option for the Calls entries you want to print.
7. (Optional) For "Copies", enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select "Collated".
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer sections, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section.

   See details
9. Click OK to start printing.

Tip You can also print an Organizer entry by dragging and dropping the entry to in Toolbox.

{button ,AL(`H_PRINTING_CALLS_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing information for different paper datebooks

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the type of datebook for which you're printing information, and the size of the paper. Some of the datebook papers you can choose from are DayRunner, Franklin Day Planner, and Time Manager.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select "Double sided," click Options. Under "Double sided," select the appropriate option.

{button ,AL(`H_PRINTING_INFORMATION_FOR_DIFFERENT_DATEBOOKS_STEPS',1)} Go to procedure

Printing information for different paper datebooks

You can print your Organizer information to fit a specific datebook paper that is already preprinted, such as Franklin Day Planner Classic.

1. Choose File - Print.
2. Click the "Section" box and select the Organizer section that has the entries you want to print.
3. Click the "Layout" box and select a layout for how you want the printed information to appear.

   See details
4. Click the "Paper" box and select the manual datebook page you want to print, such as Franklin Day Planner Classic.

   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Under "Range," select the option for the range of information you want to print.
7. Place the paper datebook pages in your printer.

   See your printer documentation for instructions on how to place paper in the printer.
8. Click OK to start printing.

{button ,AL(`H_PRINTING_INFORMATION_FOR_DIFFERENT_DATEBOOKS_DETAILS',1)} See details

{button ,AL(`;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_CALENDAR_APPOINTMENTS_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SELECTING_DIFFERENT_LAYOUTS_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Printing multiple calendars

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

{button ,AL(`H_PRINTING_MULTIPLE_CALENDARS_STEPS',1)} Go to procedure

Printing multiple calendars

If you chose to view multiple calendars in your Organizer file, you can print the entries from the multiple calendars all on one 8 1/2 x 11" piece of paper.

Note To display multiple calendars, choose View - Multiple Calendars. If you change to multiple calendar view, you must choose Day per Page.

1. Choose File - Print.
2. Click the "Section" box and select "Calendar."
3. Click the "Layout" box and select "Multiple Calendar."
4. Click the "Paper" box and select "Letter 8 1/2 x 11"."
5. Select "Single sided".
6. Under "Range," specify the current date for "From" and "To," or click the "From" and "To" boxes and select the current date.
7. Click OK to start printing.

{button ,AL(`H_PRINTING_MULTIPLE_CALENDARS_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_WORKING_WITH_MULTIPLE_CALENDARS_OVER;H_SETTING_UP_YOUR_PRINTER_STEPS;H_OVERVIEW_LAYOUTS_OVER;H_OVERVIEW_PAPER_TYPES_OVER;H_OVERVIEW_PRINT_LAYOUTS_OVER;H_OVERVIEW_PRINTING_YOUR_ORGANIZER_INFORMATION_OVER;',0)} See related topics

Details: Printing Notepad pages

Keyboard Shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected. There are three Notepad layouts: "Notepad Contents," "Notepad Contents" and "Pages," and "Notepad Pages."

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, or customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select "Double sided," click Options. Under "Double sided," select the appropriate option.

{button ,AL(`H_PRINTING_NOTEPAD_PAGES_STEPS',1)} Go to procedure

Printing Notepad pages

1. Choose File - Print.
2. Click the "Section" box and select "Notepad."
3. Click the "Layout" box and select the layout for how you want the information printed.

   See details
4. If necessary, click the "Paper" box and select a paper type.

   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Under "Range," select the option for the range of Notepad pages you want to print.
7. (Optional) For "Copies," enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select "Collated."
8. Click OK to start printing.

Tip You can also print an Organizer entry by dragging and dropping the entry to in Toolbox.

{button ,AL(`H_PRINTING_NOTEPAD_PAGES_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing Planner events

Keyboard Shortcut
You can also press CTRL+P to display the Print dialog box.

Printing shown-through entries
If you've shown entries from the Calendar section in Planner, Organizer will print the shown through items as well as your Planner events.

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several sections on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Calls, Planner, and Anniversary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 x 11" paper, or customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select "Double sided," click Options. Under "Double sided," select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under "For part of layout," select the part of the layout to which you want to map a section. Under "Use information from," select the section whose entries you want printed in the layout part you just selected.

If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the trifold layout. Select another layout.

{button ,AL(`H_PRINTING_PLANNER_EVENTS_STEPS',1)} Go to procedure

Printing Planner events

1. Choose File - Print.

2. Click the "Section" box and select "Planner."
3. Click the "Layout" box and select a layout for how you want the information printed.

   See details
4. If necessary, click the "Paper" box and select a paper type.

   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Under "Range," select the options for the range of information you want to print.
7. (Optional) For "Copies", enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select "Collated".
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer section, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section.

   See details
9. Click OK to start printing.

Tip You can also print an Organizer entry by dragging and dropping the entry to in Toolbox.

{button ,AL(`H_PRINTING_PLANNER_EVENTS_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing To Do tasks

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several sections on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Calls, Planner, and Anniversary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 x 11" paper, or customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select "Double sided," click Options. Under "Double sided," select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, If you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under "For part of layout," select the part of the layout to which you want to map a section. Under "Use information from," select the section whose entries you want printed in the layout part you just selected.

If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the trifold layout. Select another layout.

{button ,AL(`H_PRINTING_TO_DO_TASKS_STEPS',1)} Go to procedure

Printing To Do tasks

1. Choose File - Print.
2. Click the "Section" box and select "To Do."
3. Click the "Layout" box and select a layout for how you want the printed information to appear.

   See details
4. If necessary, click the "Paper" box and select a paper type.

   See details
5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

   See details
6. Under "Range,"select the option for the range of information you want to print.
7. (Optional) For "Copies", enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select "Collated".
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer sections, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section.

   See details
9. Click OK to start printing.

Tip You can also print an Organizer entry by dragging and dropping the entry to in Toolbox.

{button ,AL(`H_PRINTING_TO_DO_TASKS_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing your day's scheduled activities

Keyboard shortcut

You can also press CTRL+P to display the Print dialog box.

Mapping sections

Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under "For part of layout," select the part of the layout to which you want to map a section. Under "Use information from," select the section whose entries you want printed in the layout part you just selected.

If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

{button ,AL(`H_PRINTING_YOUR_SCHEDULE_STEPS',1)} Go to procedure

Printing your day's scheduled activities

The first thing you may want to do on a typical work day is start Organizer and print your scheduled activities for the day. Let's say you want to print your Calendar, To Do, and Calls entries all on one 8 1/2 x 11" piece of paper.

1. Choose File - Print.
2. Click the "Section" box and select "Calendar."
3. Click the "Layout" box and select "Daily Calendar/To Do/Calls."
4. Click the "Paper" box and select "Letter 8 1/2 x 11"."
5. Select "Single sided."
6. Under "Range," specify the current date for "From" and "To," or click the "From" and "To" boxes and select the current date.
7. (Optional) Click Sections, select how you want to map the Organizer sections, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section.

   See details
8. Click OK to start printing.

{button ,AL(`H_PRINTING_YOUR_SCHEDULE_DETAILS',1)} See details

{button ,AL(`;H_MAPPING_SECTIONS_STEPS;H_OVERVIEW_LAYOUTS_OVER;H_OVERVIEW_PAPER_TYPES_OVER;H_OVERVIEW_PRINT_LAYOUTS_OVER;H_OVERVIEW_PRINTING_YOUR_ORGANIZER_INFORMATION_OVER;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',0)} See related topics

Details: Selecting a different layout

Keyboard shortcut
You can also press CTRL+P to select a different layout.

Selecting a layout
A layout determines how the printed information will appear. In the "Layout" box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several section on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Calls, Planner, and Anniversary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the "Preferences" box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of paper on which you're printing. For example, the paper type can be 8 1/2 x 11" paper, labels, or customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

To see an illustration of the paper type you selected, click Layouts (in the Print dialog box), then click Paper. Click OK and click OK again to return to the Print dialog box.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the trifold layout. Select another layout.

{button ,AL(`H_SELECTING_DIFFERENT_LAYOUTS_STEPS',1)} Go to procedure

Selecting a different layout

1. Choose File - Print.

2. Click the "Section" box and select the section you want to print.
3. Click the "Layout" box and select a layout.
   See details
4. If necessary, click the "Paper" box and select a paper type.
   See details
5. Click OK to start printing.

{button ,AL(`H_SELECTING_DIFFERENT_LAYOUTS_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_PRINTING_YOUR_ORGANIZER_INFORMATION_OVER;H_OVERVIEW_PRINT_LAYOUTS_OVER;H_OVERVIEW_LAYOUTS_OVER;',0)} See related topics

Specifying a range of entries

Option	Result
All	Prints all pages in the section you selected.
From and To	Prints entries that fall between a set of dates you specify if you're printing from the Calendar, Planner, Calls, or Anniversary sections; click the "From" and "To" boxes to select the date from the calendar.
	Prints entries that fall alphabetically or sequentially between the letters, names, or numbers you specify if you're printing from the Address or Notepad section; type the letters, names, or numbers in the "From" and "To" boxes.
Selected entries	Prints the entries you selected before you chose File - Print.

Details: Specifying a range of information to print

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

{button ,AL(`H_SPECIFYING_A_RANGE_OF_INFORMATION_TO_PRINT_STEPS',1)} Go to procedure

Specifying a range of information to print

1. Choose File - Print.

2. Under "Range," select the appropriate options you want.
3. Click OK.

{button ,AL(`H_SPECIFYING_A_RANGE_OF_INFORMATION_TO_PRINT_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Specifying the address records to print

Option	Result
Home	Prints all home Address records in the Address section.
Business	Prints all business Address records in the Address section.
Both	Prints both home and business Address records in the Address section.
Current	Prints the selected Address record (home or business). Select the Address record before you choose File - Print.

Stopping printing
You can stop printing at any time that the Printing dialog box is displayed by clicking Cancel.

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',0)} See related topics

To Do layouts

Calendar List	Daily Trifold List
Daily Calendar/To Do	Daily Trifold Timeline
Daily Calendar/To Do/Calls	Monthly Calendar
Daily Page	Weekly 2-Page
Daily Timeline	Weekly Timeline
Daily Trifold Deluxe List	Weekly Work Timeline
Daily Trifold Deluxe Timeline	Yearly Calendar

Add Calendar icon
Click here to add a calendar to Multiple Calendar view.

Another calendar
You can display another Calendar section you have created or, if you have sufficient access rights, another user's Calendar section.

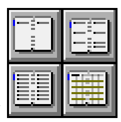
Overview: Calendar views

The Calendar section has four views: Day per Page, Work Week, Week per Page, and Month. These views let you display Calendar entries differently.

You can easily switch from one view to another as well as specify a default view. For example, on a day-to-day basis you may prefer working with the time slots in the Day per Page view, but periodically switch to the Month view to get an overview of your schedule. Regardless of the view you're in, you can schedule new appointments, edit existing appointments, and move appointments from one day or time to another.

Each view displays the same information in a different format.

- Day per Page view displays a single day on each page. You can choose to display appointment times, or time slots, for each day, or only those times for which you scheduled appointments. Displaying the appointment time slots is particularly useful if your day is filled with a series of appointments; for example, if you're a medical professional, a sales representative, or an instructor.
- Work Week view displays one week across two facing pages. The week starts with Monday, and as each day fills with appointments, you can scroll through the appointments.
- Week per Page view displays two weeks on facing pages. The week starts on Monday, and you can scroll through a day's appointments.
- Month view displays an entire month across two facing pages. Organizer displays one line of information for each appointment.

To switch from view to view, click the Calendar View  icons in Toolbox.

Note Organizer also lets you display two or more calendars side by side using Multiple Calendar view. For example, you can review your calendar and another user's calendar at the same time. To display multiple calendars, Organizer must be in Day per Page, time slot view.

{button ,AL(`H_ABOUT_CALENDAR_OVER;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;H_OVERVIEW_WORKING_WITH_MULTIPLE_CALENDARS_OVER',0)} See related topics

Changing preferences in Calendar

Calendar preferences determine how your calendar looks and how information appears. Changing preferences is optional; if you don't change your Calendar preferences, Organizer uses the default preferences.

1. Go to Calendar and choose View - Calendar Preferences.
2. Under View, select the appropriate options for how you want to display the Calendar section.
3. Under Show, select the appropriate options for what you want to appear with your appointments.
4. Under Options, select the appropriate options to customize the appearance and function of Calendar.

   See details
5. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_DETAILS',1)} See details

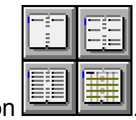
{button ,AL(`H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CHANGING_THE_CALENDAR_DISPLAY_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS;H_SHARING_CALENDARS_STEPS;',0)} See related topics

Changing the view of appointments

You can easily change from one view to another in the Calendar section.

1. Go to a Calendar page.
2. Choose View.
3. Choose one of the following commands: Day per Page, Work Week, Week per Page, or Month.

   Note If you are changing to Multiple Calendar view, you must choose Day per Page. Additionally, the "Display timeslots for Day per Page View" option in the Calendar Preferences dialog box must be selected in order to display Multiple Calendar view
4. (Optional) To display multiple calendars, choose View - Multiple Calendars.

Tip To change the Calendar view, you can also click a View icon .

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS;H_SHARING_CALENDARS_STEPS;H_MOVING_FROM_YEAR_TO_YEAR_IN_CALENDAR_STEPS;H_DISPLAYING_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_STEPS;',0)} See related topics

Changing the time slot increments from the Day per Page view

When you are displaying time slots in the Day per Page view, you can dynamically change the default time slot increments for the Calendar section.

1. Position the mouse pointer on a time line on the time ruler.
2. Drag up to decrease the increments; drag down to increase the increments.

   The increments can be 5, 10, 15, 20, 30, or 60 minutes.

Note You can also choose View - Calendar Preferences to change the default time slot increments.

{button ,AL(`H_DISPLAYING_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_STEPS;H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Correcting the system date and time

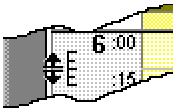
The Today's date and Clock icons in Toolbox display the system date and time. If the system date and time aren't correct, use the Windows Control Panel to change them.

Displaying time slots in the Day per Page view

1. Go to Calendar.
2. Choose View - Calendar Preferences.
3. Select the "Display time slots for Day per page view."
4. Click OK.

The time slots will appear the next time you choose the Day per Page view.

{button ,AL(`H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} <u>See related topics</u>


6 :00
:15

Fold In or Out icon
Click here to fold the page for the current date in or out.

Moving from year to year in Calendar

1. Click the Calendar section tab to display the yearly calendar.

   Today's date appears outlined in red. Year tabs appear along the left and right edges of the calendar.
2. (Optional) To display the Calendar for a different year, do one of the following: click the appropriate year tab, or click the page turners to go to the previous or next year.
3. (Optional) To display the previous or next decade, click the year tab on the top-left or bottom-right edge.
4. Double-click the date (day of month) you want to go to.

Tip To go directly to today's date, click the Today's date icon 

in Toolbox.

{button ,AL(`H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CALENDAR_VIEWS_OVER;',0)} See related topics

Remove Calendar icon
Click here to remove a calendar you have added to Multiple Calendar view.

Details: Removing a calendar from Multiple Calendar view

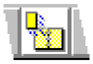
Removing a calendar in other ways
You can also display the Remove Calendar dialog box by right-clicking the title bar of an open calendar and choosing Remove Calendar.

Displaying Multiple Calendar view
To display Multiple Calendar view, choose View - Day per Page, and then choose View - Multiple Calendars. The "Display timeslots for Day per Page View" option in the Calendar Preferences dialog box must be selected in order to display Multiple Calendar view.

{button ,AL(`H_REMOVING_A_CALENDAR_FROM_MULTIPLE_CALENDAR_VIEW_STEPS',1)} Go to procedure

Removing a calendar from Multiple Calendar view

1. In Multiple Calendar view, choose View - Remove Calendar.



See details

2. Select the calendar to remove.
3. Click OK.

{button ,AL(`H_REMOVING_A_CALENDAR_FROM_MULTIPLE_CALENDAR_VIEW_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_WORKING_WITH_MULTIPLE_CALENDARS_OVER;H_CALENDAR_VIEWS_OVER;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;H_ADDING_A_CALENDAR_TO_MULTIPLE_CALENDAR_VIEW_STEPS;',0)} See related topics

Selecting a Calendar view

Option	Result
Day per Page	Displays one day per page; optionally, also displays appointment time slots for each day.
Work Week	Displays one week across two pages (default).
Week per Page	Displays one week per page.
Month	Displays one month across two pages.

Selecting what you see with your appointments

Option	Result
End time	Shows or doesn't show (default) the end time of the appointment.
Duration	Shows or doesn't show (default) the duration of the appointment.
Categories	Shows or doesn't show (default) the names of categories you assign to an appointment.
Cost code	Shows or doesn't show (default) the cost and customer codes you specify for an appointment.
Lines of description	Lets you specify the number of lines of description displayed for an appointment. Enter a number, or type the word "All" (default) to display all lines.

Specifying the display of show through entries

Option	Result
Above appointments	Displays the entries above your appointments (default).
Below appointments	Displays the entries below your appointments.
First line only	Displays only the first line of each entry.

Details: Showing Calendar appointments in Planner

Changing the appearance of Calendar appointments in Planner
Calendar appointments show as small color blocks in Planner. The default color is black.

{button ,AL(`H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS',1)} Go to procedure

{button ,AL(`H_CHANGING_PREFERENCES_IN_PLANNER_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DISPLAYING_ENTRIES_IN_MORE_THAN_ONE_SECTION_STEPS',0)} See related topics

Showing Calendar appointments in Planner

You can show appointments entries in the Planner section. You can also change preferences for how your appointments appear in Planner.

1. Choose Section - Show Through.
2. Click the "Show into" box and select "Planner."
3. Under "From," select "Calendar" if you want your Calendar entries to appear in Planner.
4. (Optional) Click Preferences to change the color in which the Calendar appointments appear, then click OK. (The default color is black.)
5. Click OK.

{button ,AL(`H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CHANGING_THE_CALENDAR_DISPLAY_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_SHARING_CALENDARS_STEPS',0)} See related topics

Details: Showing entries from other sections in Calendar

Showing entries while displaying time slots in Day per Page view
If you're using the Day per Page view with time slots, entries you show through in the Calendar don't scroll out of view as you scroll through the day's appointments; that is, these entries stay either above or below the time slots.

Organizer blocks out an area at the top or bottom of your appointments for entries you who through in Calendar. You can expand or shrink this block by dragging the solid box in the bottom-right corner. The new size of this area affects all pages in the Day per Page view.

You can also drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

- New size to use the size you dragged for all pages.
- Temporary size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16 the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

Showing entries in Multiple Calendar view
While in Multiple Calendar view, Organizer doesn't display entries from other sections in either your calendar or in the calendars you add. Show through entries will reappear in your calendar when you switch to another view.

Editing entries in Calendar
If you want to edit a To Do task and you're in the Calendar section, double-click the entry that appears in Calendar. The Edit dialog box appears for the kind of entry you want to edit: Edit To Do, Edit Calls, and so on. Make your changes and click OK.

{button ,AL(`H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS',1)} Go to procedure
{button ,AL(`H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Showing entries from other sections in Calendar

By default, Organizer can show entries from the To Do, Calls, Planner, and Anniversary sections on the appropriate day in Calendar. Showing entries from other sections can help you see your upcoming commitments in the context of your daily work, for example, you can see your To Do tasks for the day along with your appointments. You can change the way your entries appear in Calendar, and if you don't want to display entries in Calendar, you can turn off show through.

1. Choose Section - Show Through.

2. If necessary, click the "Show into" box and select "Calendar."
3. (Optional) Under "From," deselect the section or sections whose entries you don't want to appear in Calendar.

   Note If you want to redisplay entries for a particular section in Calendar, select the section you want again.
4. (Optional) Click Preferences and select the appropriate options to place the entries above or below your appointments, and to specify how much of the entries' descriptions to show. Click OK to confirm your preferences.
5. Click OK.

{button ,AL(`H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CHANGING_THE_CALENDAR_DISPLAY_STEPS;H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS;H_SHARING_CALENDARS_STEPS;',0)} See related topics

Time Slots arrow
Click here to change the time slots Organizer displays. The time slots change for all calendars.

Conflicting appointments

Conflicting appointments are displayed side-by-side in this view. You can see at a glance that a conflict exists, and decide which appointment to move.

The day's appointments

The time slots reflect the settings specified in the Calendar Preferences dialog box. The dimmed times are the hours before and after the day's start and end times. There is a solid box next to the day's start and end times. You can drag this box to change the start and end times for all Calendar days.

To create an appointment, just click a time and start typing. Each appointment's time is blocked out, showing the start and end times, and the description. To change an appointment's duration, you can drag the appointment's top or bottom border to the appropriate time.

If you cannot display all the day's appointments at once, click the scroll arrows to bring other times into view. The color of the scroll arrows changes depending on whether or not the times you can't see have available or booked time slots.

- A black arrow indicates there are available times slots, and no scheduled appointments.
- A blue arrow indicates there are scheduled appointments.
- A gray arrow indicates that you are at midnight, and that you can scroll the time slots only in the opposite direction, but not into the next or previous day.

The time slot increments (for example, every 15 or 30 minutes) also reflect the setting specified in the Calendar Preferences dialog box. You can also change the increments from this view by dragging a time line on the time ruler.

Display of long descriptions

Sometimes an appointment's description is too long to fit in the appointment's time slot. When this happens, Organizer displays as much of the description as possible and a serrated border across the bottom of the appointment.

To expand the appointment so you can read it, position the mouse pointer on the appointment. After a short pause, Organizer expands the appointment.

When you expand the appointment, Organizer displays time lines on the left and right edges of the appointment to show the appointment's start and end times.

Display of appointments that are shorter than the default duration
When an appointment is shorter than the default duration, Organizer displays hatch marks to represent the appointment. For example, this appointment has a duration of 15 minutes, but the default duration is 30 minutes.

To open the appointment so you can read it, do one of the following:

- Position the mouse pointer over the appointment. After a short pause, Organizer opens the appointment.
- Position the mouse pointer over the appointment and click.

Showing entries from other sections

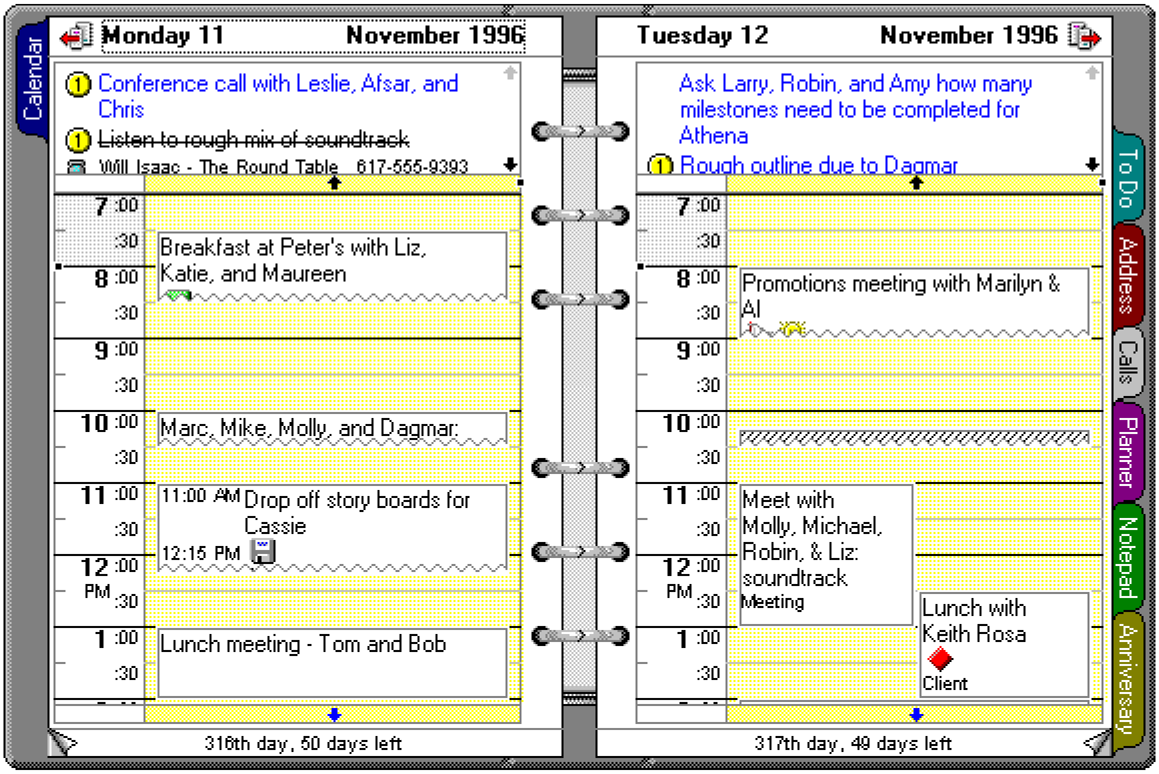
This example shows through entries from the To Do and Anniversary sections in Calendar. When you're working with time slots in the Day per page view, Organizer blocks out an area at the top or bottom of the day in which to display the shown-through entries. You can change the size of this area by dragging the solid box at the lower-right corner of the block.

Overview: Working with time slots in the Day per Page view

Displaying time slots in the Day per Page view is particularly useful for people whose day is a series of scheduled appointments because both booked and available time slots are displayed. As with other Calendar views, you can show through entries from other sections — such as To Do and Calls — along with the time slots.

With time slots, you create, edit, and manage your appointments as easily as in the other Calendar views. In addition, you can dynamically change the default day start and end times, and time slot increments from the Calendar page.

The following illustration shows time slots in the Day per Page view. The dotted lines designate areas for which there is additional Help. Click within one of these areas to display its Help topic.



{button ,AL(`H_DISPLAYING_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_STEPS;H_CALENDAR_VIEWS_OVER;H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_CHANGING_THE_DAY_START_AND_END_TIMES_FROM_DAY_PER_PAGE_VIEW_STEPS;H_CHANGING_THE_TIME_SLOT_INCREMENTS_FROM_DAY_PER_PAGE_VIEW_STEPS;',0)} See related topics

Your calendar
Your calendar shows appointments and meetings, but not show through entries.

Details: Applying a filter

Adding a filter to the View menu
To add the name of a filter to the menu, choose Create - Filters, select the filter, click Edit, select "Show in View - Apply Filter menu," click OK, and then click Close.

Selecting a filter not in the menu
To display a filter you haven't added to the menu, choose Create - Filters, select the filter, and click Apply.

Clearing a filter before selecting another filter
If a filter is already in place when you select a new filter, Organizer clears the currently selected filter and then applies the new filter to all entries.

Adding new entries to a section using a filter
If you add a new entry that doesn't match a filter's criteria while the filter is in place, the new entry will appear in the section. Choose View - Apply Filter and select the filter again to apply the filter to new entries.

{button ,AL(`H_APPLYING_A_FILTER_STEPS',1)} Go to procedure

Details: Clearing a filter

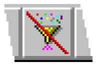
Clearing a filter in other ways

You can also choose Create - Filters, select "(None)," and then click Apply to clear a filter.

{button ,AL(`H_CLEARING_A_FILTER_STEPS',1)} Go to procedure

Clearing a filter

To clear a filter, choose View - Clear Filter.



Organizer redisplays all entries in all sections.

{button ,AL(`H_CLEARING_A_FILTER_DETAILS',1)} See details

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Details: Creating a filter

Moving around filter fields

To move in a filter, you can also use , ↓, →, ←, PGUP, and PGDN to move around the filter table.

To display the options in a box using the keyboard, move to the box and press ALT+↓. Then press and ↓ to move through the list. To clear box options, click ALT+.

Creating a filter that prompts for text or a value

You can create a filter that prompts you for text or a value each time you apply the filter. For example, you might create a filter that prompts for a zip code, and then filters entries based on the zip code you enter.

To create a filter that prompts for a label or value, enter a ? and then the prompt text in the "Value" field of the filter; for example, ?Zip code.

You can include more than one prompt for a filter. Organizer displays the prompts in the order they appear in the filter table.

Inserting and deleting rows

To insert a row in the filter table, click Insert Row. Organizer adds the row above the current row.

To delete a row, move to any field in the row and click Delete Row.

{button ,AL(`H_CREATING_A_FILTER_STEPS',1)} Go to procedure

Deleting a filter

Caution You can't undo deleting a filter.

1. Choose Create - Filters.

2. Under "Filters," select a filter.
3. Click Remove.
4. Click Yes when Organizer asks whether you want to delete the filter.
5. Click Close.

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;',0)} <u>See related topics</u>

Details: Editing a filter

Moving around in filter fields

In addition to using your mouse, you can also use , ↓, →, ←, PGUP, and PGDN to move around the filter table.

To display the options in a box using the keyboard, move to a box and press ALT+↓.   Then press or ↓ to move through the list. To clear box options, click ALT+.

Inserting and deleting rows

To insert a row in the filter table, click Insert Row. Organizer adds the row above the current row.

To delete a row, move to any field in the row and click Delete Row.

{button ,AL(`H_EDITING_A_FILTER_STEPS',1)} Go to procedure

Setting an Address filter

Field	Result
Categories	Displays Address records in the category you enter under "Value," according to the criteria you select under "Test."
Business Assistant, Business City, Business Company, Business Country, Business E-Mail, Business Ext, Business Fax, Business Job Title, Business Notes, Business State, Business Street, Business Tel 1, Business Tel 2, Business Zip, Children, City, Country, E-mail, Fax, First name, Last name, Notes, Spouse, State, Street, Tel1, Tel2, Title, Zip, Unused1, Unused2	Displays Address records in which the text or numbers in the field you select match the text or numbers you enter under "Value," according to the criteria you select under "Test."
[any field]	Displays Address records, any field of which matches the text or numbers you enter under "Value, " according to the criteria you select under "Test."

Setting an Anniversary filter

Field	Result
Categories	Displays anniversaries in the category you enter under "Value," according to the criteria you select under "Test."
Confidential	Displays anniversaries that are or aren't set as confidential.
Cost Code	Displays anniversaries that use the cost code you enter under "Value," according to the criteria you select under "Test."
Customer Code	Displays anniversaries that use the customer code you enter under "Value," according to the criteria you select under "Test."
Description	Displays anniversaries whose description contains the text or numbers you enter under "Value," according to the criteria you select under "Test."
Repeated Yearly	Displays anniversaries that are or aren't set to occur on the same date every year.
Start Date	Displays anniversaries with the start date you enter under "Value," according to the criteria you select under "Test."
Zodiac Sign	Displays anniversaries based on the zodiac sign you enter under "Value," according to the criteria you select under "Test."
[any field]	Displays anniversaries, any field of which matches the text or numbers you enter under "Value," according to the criteria you select under "Test."

Setting a Calendar filter

Field	Result
Categories	Displays appointments in the category you enter under "Value," according to the criteria you select under "Test."
Confidential	Displays appointments that are or aren't set as confidential.
Cost Code	Displays appointments that use the cost code you enter under "Value," according to the criteria you select under "Test."
Customer Code	Displays appointments that use the customer code you enter under "Value," according to the criteria you select under "Test."
Description	Displays appointments whose description contains the text or numbers you enter under "Value," according to the criteria you select under "Test."
End Date Time	Displays appointments based on the end date or time you enter under "Value," according to the criteria you select under "Test."
Penciled In?	Displays appointments that are or aren't penciled in.
Start Date Time	Displays appointments based on the start date or time you enter under "Value," according to the criteria you select under "Test."
[any field]	Displays appointments, any field of which matches the text or numbers you enter under "Value," according to the criteria you select under "Test."

Setting a Calls filter (continued)

Field	Result
End Date Time	Displays Calls entries based on the end date or time you enter under "Value," according to the criteria you select under "Test."
First Name	Displays Calls entries in which the text or numbers in the "First Name" field match the text or numbers you enter under "Value," according to the criteria you select under "Test."
Last Name	Displays Calls entries in which the text or numbers in the "Last Name" field match the text or numbers you enter under "Value," according to the criteria you select under "Test."
Start Date Time	Displays Calls entries based on the start date or time you enter under "Value," according to the criteria you select under "Test."
Status	Displays Calls entries with the status you enter under "Value," according to the criteria you select under "Test."
Telephone Number	Displays Calls entries in which the text or numbers in the "Telephone Number" field match the text or numbers you enter under "Value," according to the criteria you select under "Test."
Use Country And Area Code	Displays Calls entries that are or aren't set to use the country code and area code.
[any field]	Displays Calls entries, any field of which matches the text or numbers you enter under "Value," according to the criteria you select under "Test."

Back

Setting a Calls filter

Field	Result
Area Code	Displays Calls entries in which the number in the "Area Code" field matches the number you enter under "Value," according to the criteria you select under "Test."
Categories	Displays Calls entries in the category you enter under "Value," according to the criteria you select under "Test."
Company	Displays Calls entries in which the text or numbers in the "Company" field match the text or numbers you enter under "Value," according to the criteria you select under "Test."
Completed	Displays Calls entries that are or aren't marked completed.
Confidential	Displays Calls entries that are or aren't set as confidential.
Cost Code	Displays Calls entries that use the cost code you enter under "Value," according to the criteria you select under "Test."
Country Code	Displays Calls entries in which the number in the "Country Code" field matches the number you enter under "Value," according to the criteria you select under "Test."
Customer Code	Displays Calls entries that use the customer code you enter under "Value," according to the criteria you select under "Test."
Description	Displays Calls entries whose description contains the text or numbers you enter under "Value," according to the criteria you select under "Test."

Continued

Setting a Notepad filter

Field	Result
Categories	Displays pages in the category you enter under "Value," according to the criteria you select under "Test."
Confidential	Displays pages that are or aren't set as confidential.
Creation Date Time	Displays pages based on the creation date or time you enter under "Value," according to the criteria you select under "Test."
Notes	Displays pages that contain the text or numbers you enter under "Value," according to the criteria you select under "Test."
Page Number	Displays pages based on the page number you enter under "Value," according to the criteria you select under "Test."
Title	Displays pages whose title contains the text you enter under "Value," according to the criteria you select under "Test."
[any field]	Displays pages, any field of which matches the text or numbers you enter under "Value," according to the criteria you select under "Test."

Setting a Planner filter

Field	Result
Categories	Displays Planner events in the category you enter under "Value," according to the criteria you select under "Test."
Confidential	Displays Planner events that are or aren't set as confidential.
Cost Code	Displays Planner events that use the cost code you enter under "Value," according to the criteria you select under "Test."
Customer Code	Displays Planner events that use the customer code you enter under "Value," according to the criteria you select under "Test."
Notes	Displays Planner events whose description contains the text or numbers you enter under "Value," according to the criteria you select under "Test."
From Date	Displays Planner events based on the date you enter under "Value," according to the criteria you select under "Test."
KeyID	Displays Planner events whose event type contains the text or numbers you enter under "Value," according to the criteria you select under "Test."
Until Date	Displays Planner events based on the until date you enter under "Value," according to the criteria you select under "Test."
[any field]	Displays Planner events, any field of which matches the text or numbers you enter under "Value," according to the criteria you select under "Test."

Setting a To Do filter

Field	Result
Categories	Displays To Do tasks in the category you enter under "Value," according to the criteria you select under "Test."
Completion Date	Displays To Do tasks based on the completion date you enter under "Value," according to the criteria you select under "Test."
Confidential	Displays To Do tasks that are or aren't set as confidential.
Cost Code	Displays To Do tasks that use the cost code you enter under "Value," according to the criteria you select under "Test."
Customer Code	Displays To Do tasks that use the customer code you enter under "Value," according to the criteria you select under "Test."
Description	Displays To Do tasks whose description contains the text or numbers you enter under "Value," according to the criteria you select under "Test."
Due Date	Displays To Do tasks based on the until date you enter under "Value," according to the criteria you select under "Test."
Priority	Displays To Do tasks with the priority you enter under "Value," according to the criteria you select under "Test."
Start Date	Displays To Do tasks based on the start date you enter under "Value," according to the criteria you select under "Test."
Status	Displays To Do tasks with the status you enter under "Value," according to the criteria you select under "Test."
[any field]	Displays To Do tasks, any field of which matches the text or numbers you enter under "Value," according to the criteria you select under "Test."

Setting filter fields

The fields that you can use for a filter depend on the section you selected in the "Section" box.   Select a topic below for more information on each section's filter fields.

- Setting an Address filter
- Setting an Anniversary filter
- Setting a Calendar filter
- Setting a Calls filter
- Setting a Notepad filter
- Setting a Planner filter
- Setting a To Do filter

Setting test options

Field	Result
Begins With	Displays all entries that begin with the text you enter under "Value."
Contains	Displays all entries that exactly match the text you enter under "Value."
Doesn't Contain	Displays all entries that don't include the text you enter under "Value."
Doesn't End With	Displays all entries that don't end with the text you enter under "Value."
Doesn't Begin With	Displays all entries that don't begin with the text you enter under "Value."
Earlier Than	Displays all entries that occur earlier than the date or time you enter under "Value."
Ends With	Displays all entries that end with the text you enter under "Value."
Equals	Displays all entries that are exactly equal to the text or numbers you enter under "Value."
Greater	Displays all entries that are greater than the numbers you enter under "Value."
Greater or Equal To	Displays all entries that are greater than or exactly equal to the numbers you enter under "Value."
Later Than	Displays all entries that occur later than the date or time you enter under "Value."
Less	Displays all entries that are less than the numbers you enter under "Value."
Less or Equal To	Displays all entries that are less than or equal to the numbers you enter under "Value."
Not Equals	Displays all entries that don't match the text or numbers you enter under "Value."
Not on	Displays all entries that don't occur on the date or time you enter under "Value."
On or Later Than	Displays all entries that occur on or later than the date or time you enter under "Value."
On	Displays all entries that occur on the date or time you enter under "Value."
On or Earlier Than	Displays all entries that occur on or earlier than the date or time you enter under "Value."

Setting the And/Or option

Option	Result
And	Indicates that you are entering another filter criteria within the same section (for example, a filter based on both a start date and category for Calendar appointments).
Or	Indicates that you are entering a filter criteria in another section (for example, a filter based on a start date in the Calls section and To Do section).

Archiving information

To keep a file's size manageable and streamline your Notes mail file, you can archive information you don't need on a day-to-day basis. Archiving a database by regularly moving data out of the working copy and into an archive database can significantly improve database performance as well as conserve disk space.

You archive information in your Notes mail file in Notes. For more information on archiving your Notes mail file, see Notes Help or your system administrator.

{button ,AL(`H_MOVING_ORGANIZER_INFORMATION_TO_A_NOTES_MAIL_FILE_FOR_GROUP_SCHEDULING_OVER;H_MOVING_ORGANIZER_INFORMATION_TO_A_NOTES_MAIL_FILE_FOR_GROUP_SCHEDULING_STEPS',0)} See related topics

Assigning styles to Notepad pages

Option	Result
Start a chapter	Establishes a chapter beginning with this page.
Links page	Creates a Notepad Links page that displays a list of links you've made between Organizer entries and the Notepad Links page.
Folded	Makes a page a double-width size when you open it; a single-width size when you fold it.
Color	Lets you assign a color to the page.

Assigning categories and confidential status to Notepad pages

Option	Result
Categories	Establishes a category for each Notepad entry. For example, you can select the marketing category for an entry about marketing milestones.
Confidential	Makes or doesn't make (default) the Notepad page confidential, so others accessing your file can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Details: Assigning color to Notepad pages

Using color with Notepad pages

You can assign color to any Notepad pages. You can assign color to those pages that begin new chapters or color code pages of similar information.

For example, you can color code all your Notepad pages that are related to financial information green; you can color code project ideas yellow; you can make travel and vacation information blue, and so on.

{button ,AL(`H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_STEPS',1)} Go to procedure

Assigning color to Notepad pages

You can assign color to any Notepad pages.

1. Create or edit a Notepad page.
2. Under "Styles," select "Color."
   See details
3. Click OK.

{button ,AL(`H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_CREATING_CHAPTERS_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Customizing alignment

You can align your Notepad page text to fit your specific needs.

1. Go to the Notepad page you've created.
2. Select the text you want to align.
3. Choose Text - Alignment.
4. Select the appropriate option.

{button ,AL(`H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS;H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZING_FONTS_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS',0)} See related topics

Details: Customizing fonts

Using Fonts

You can select fonts and their various attributes to suit your specific needs. You can make selections that affect entire Notepad pages of text or that affect only individual letters of a single word. How often and to what extent you want to use fonts and their attributes is entirely up to you.

There are a number of fonts from which to choose, as well as font styles and sizes. Just click the "Font," "Font style," and "Size" boxes and make your selections. By observing the text changes in the "Sample" box, you'll see how your selections would affect the text on your Notepad page.

Using Effects

Effects can be extremely useful when you want to highlight certain text, when you (or you and a co-worker) are editing text, or when you're just trying out new ideas on-page. You can strike through text that you don't want to delete quite yet, or you can underline and color text for emphasis.

For example, let's say you and a colleague are creating a marketing announcement for an upcoming event, and you want to use Notepad to sketch out your ideas. Use strikethrough to show where each of you has edited text, use underline for text you both agree needs to be in the announcement, and use colored text to highlight any outstanding issues to resolve. Just click "Strikethrough" or "Underline" when you want to use them, and click the "Colors" box to select the color you want.

To further customize the appearance of your text, click the "Script" box to select whatever type of script writing you'd like for your text.

By observing the text changes in the "Sample box," you'll see how your selections would affect the text on your Notepad page.

{button ,AL(`H_CUSTOMIZING_FONTS_STEPS',1)} Go to procedure

Customizing fonts

You can customize your Notepad text by selecting different fonts and attributes.

1. Go to the Notepad page you've created.
2. Select the text whose fonts you want to change.
3. Choose Text - Font.
4. Select the fonts and attributes you want.
   See details
5. Click OK.

{button ,AL(`H_CUSTOMIZING_FONTS_DETAILS',1)} See details

{button ,AL(`H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS;H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS',0)} See related topics

Customizing how text wraps

You can choose to have text wrap within the Notepad page margins as you type on the Notepad page, or have the text wrap after you finished typing it. Notepad page text wraps as you type, by default.

1. Go to the Notepad page you've created.
2. Choose Text - Word wrap to toggle off or on the word wrap function.

{button ,AL(`H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS;H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS;H_CUSTOMIZINGFONTS_STEPS',0)} See related topics

Customizing paragraph settings

You can indent any Notepad page paragraph so that it appears exactly where you want it to appear on your Notepad page.

1. Go to the Notepad page you've created.
2. Select the paragraph you want to indent.
3. Choose Text - Paragraph.
4. Select the appropriate options.
5. Click OK.

{button ,AL(`H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS;H_CUSTOMIZINGFONTS_STEPS',0)} See related topics

Details: Customizing tab settings

Using Tabs

The number that appears in the Tab stop position field represents the tab stop position for the current paragraph. You can use a different tab stop position by either typing a new one in the tab stop position field, or by selecting one from the Tab stop position list.

Using Set, Clear, and Clear All

- Click Set to add the specified tab stop position to the Tab stop position list for future use.
- Click Clear to remove the specified tab stop position from the Tab stop position list.
- Click Clear All to remove all tab stop positions from the Tab stop position list.

{button ,AL(`H_CUSTOMIZING_TAB_SETTINGS_STEPS',1)} Go to procedure

Customizing tab settings

Use tabs to position your paragraphs where you want them to appear on your Notepad page.

1. Go to the Notepad page you've created.
2. Select the paragraph you want to set tabs for.
3. Choose Text - Tabs.
4. Select the appropriate options.

   See details

{button ,AL(`H_CUSTOMIZING_TAB_SETTINGS_DETAILS',1)} See details

{button ,AL(`H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS;H_CUSTOMIZINGFONTS_STEPS;H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS',0)} See related topics

Customizing text attributes

You can assign Notepad page text attributes of bold, italic, underline, or strike through.

1. Go to the Notepad page you've created.
2. Select the text you want to customize.
3. Choose Text - Character.
4. Select the appropriate options.

{button ,AL(`H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZINGFONTS_STEPS;H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS',0)} See related topics

Customizing with bulleted text

1. Go to the Notepad page you've created.
2. Select the text you want to bullet.
3. Choose Text - Bullet Style.

{button ,AL(`H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS;H_CUSTOMIZINGFONTS_STEPS;H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS',0)} See related topics

Details: Deleting a Notepad page

Keyboard shortcuts
You can also press CTRL+X or press DEL to delete a Notepad page.

Deleting a Notepad page in other ways
You can also choose Edit - Cut or click  to delete a Notepad page.

{button ,AL(`H_DELETING_A_NOTEPAD_PAGE_STEPS',1)} Go to procedure

Deleting a Notepad page

1. Select the Notepad page you want to delete.
2. Drag and drop the Notepad page to in Toolbox.

Note To retrieve a deleted Notepad page, choose Edit - Undo Page Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_A_NOTEPAD_PAGE_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_EDITING_A_NOTEPAD_PAGE_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Details: Editing a Notepad page

Keyboard shortcuts
You can also press CTRL+E to edit a Notepad page you selected.

Editing Notepad pages in other ways
You can also choose Edit - Edit Page to edit a Notepad page you selected.

Editing information on your Notepad page
You can edit Notepad information in two ways: directly in the Notepad page or in the Edit Page dialog box.

Editing the existing text of your Notepad page
To edit the existing Notepad text, click the page to select it, click the text you want to edit, and make your changes.

To edit text font and paragraph attributes, tabs, bullets, alignment, and so on, select the text you want to change and choose Text and then choose the appropriate command. For example, Text - Fonts, Text - Paragraph, and so on.

When you are done editing, press F2 to confirm your changes.

Adding to fields you previously left blank and options you didn't select
If you want to add information to fields you left blank and select options you haven't selected, you need to edit your Notepad page in the Edit Page dialog box. Choose Edit - Edit Page. When the Edit Page dialog box appears, you can make your changes and click OK to enter your changes.

{button ,AL(`H_EDITING_A_NOTEPAD_PAGE_STEPS',1)} Go to procedure

Editing a Notepad page

1. Double-click the Notepad entry.
2. Edit the Notepad entry.

   See details
3. Click OK.

{button ,AL(`H_EDITING_A_NOTEPAD_PAGE_DETAILS',1)} See details

{button ,AL(`H_ENTERING_TEXT_DIRECTLY_ON_A_NOTEPAD_PAGE_STEPS;H_CUSTOMIZING_ALIGNMENT_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Details: Folding Notepad pages

Using folding Notepad pages

Folded pages are pages you assign a double-width size to accommodate large or landscape-oriented information, such as embedded OLE objects, spreadsheets, and graphics.

For example, let's say you need to track all costs related to an upcoming marketing event. You create a 1-2-3 spreadsheet and embed the OLE object for the spreadsheet on a folded Notepad page.

{button ,AL(`H_FOLDING_NOTEPAD_PAGES_STEPS',1)} Go to procedure

Folding Notepad pages

Create Folded Notepad pages to accommodate large or landscape-oriented information.

1. Create or edit a Notepad page.
2. Under "Style," select "Folded."

   See details
3. Click OK.

{button ,AL(`H_FOLDING_NOTEPAD_PAGES_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_LINKING_NOTEPAD_PAGES_STEPS;H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_STEPS;H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS',0)} See related topics

Details: Creating a Notepad page

Creating Notepad pages in other ways

You can also choose Create - Page or press INS to create a Notepad page when you're in the Notepad section.

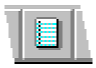
{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS',1)} Go to procedure

Creating a Notepad page

In Notepad, you can create pages and assign styles and colors to them. You can add text and objects to your Notepad pages.

Creating the page

1. Go to the Notepad section and double-click the Notepad page.



2. For "Title," enter a title that describes what this Notepad page will contain.
3. Under "Page number," select the appropriate option.
4. Under "Style," select the appropriate styles.
5. Select the options to create a category and make a page confidential.
6. Click OK.

Tip To create additional Notepad pages, click Add before you click OK. When you finish entering your Notepad pages, click OK.

Adding text to the page

After you've entered a title for the Notepad page, and selected any of the styles and options above, you can add text to your page. Position your mouse pointer on the Notepad page and click. The I-beam pointer appears. Begin typing the text you want on the page. When you're finished entering text, press F2 to save it.

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_DETAILS',1)} See details

{button ,AL(`H_ENTERING_TEXT_DIRECTLY_ON_A_NOTEPAD_PAGE_STEPS;H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_STEPS;H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_CREATING_CHAPTERS_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS;H_LINKING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Linking Notepad pages

Using linked pages

It is helpful to link pages that contain related information. A Notepad Links page lists all the links made between Organizer entries and the Notepad Links page.

For example, let's say your upcoming marketing event will include keynote speakers. You can include the names of these speakers in your Marketing Event Information chapter and add relevant information about them. To make contacting them easier, you can create links to their addresses in the Address section so you can quickly call them or locate their addresses to correspond with them.

{button ,AL(`H_LINKING_NOTEPAD_PAGES_STEPS',1)} <u>Go to procedure</u>

Creating Links pages in Notepad

You can use a Notepad Links page to display a list of links you make to the Notepad page. For example, you can create a page with links to all the information for one project or to your most commonly used applications.

1. Create a Notepad page.
2. Under "Style," select "Links page."

   See details
3. Click OK.
4. Create links between Organizer entries and the Notepad Links page.

   As you add links to the Notepad Links page, Organizer enters the description of the entry you're linking to the page.
5. (Optional) Click the entry on the page to go to that entry.

Note If you create multiple links to a Notepad page without making the page a Links page, Organizer displays only one link symbol for all the links you create to the Notepad page.

{button ,AL(`H_LINKING_NOTEPAD_PAGES_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS;H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_STEPS;H_CREATING_LINKS_STEPS;',0)} See related topics

Selecting page numbering options

Option	Result
Automatic	Establishes an automatic method of page numbering (default).
Manual	Establishes a manual method of page numbering.

Tip Renumber your pages manually to change the order in which they appear in your Notepad section. For example, let's say you want page 8 to become page 3. From the Edit Page dialog box under Page number, type the number 3 in the "Manual" box and click OK.

Selecting paragraph settings options

Option	Results
Indentation Left	From the left, indents the selected paragraph the amount you specify.
Indentation Right	From the right, indents the selected paragraph the amount you specify.
Indentation First line	From the left, indents the first line only of the selected paragraph the amount you specify.
Alignment	Aligns the selected paragraph to the left, right, or center within the paragraph indentations you've specified.

Note You specify the system of measurement (metric or inches) to use to set indentation using Regional Settings in the Control Panel. This setting is not specified in Organizer.

Selecting text alignment options

Option	Results
Left (CTRL+L)	Selected text appears aligned along the left margin of the Notepad page.
Right (CTRL+R)	Selected text appears aligned along the right margin of the Notepad page.
Center (CTRL+N)	Selected text appears centered on the Notepad page.

Selecting text character options

Option	Result
Normal text (CTRL+T)	Selected text appears normal on the Notepad page.
Bold (CTRL+B)	Selected text appears bold on the Notepad page.
Italic (CTRL+I)	Selected text appears italic on the Notepad page.
Underline (CTRL+U)	Selected text appears underlined on the Notepad page.
Strike Through (CTRL+S)	Selected text appears with a strikethrough line on the Notepad page.

Using tab settings to customize your text

Option	Result
Set	Adds the specified tab stop position to the Tab stop position list for future use.
Clear	Removes the specified tab stop position from the Tab stop position list.
Clear All	Removes all tab stop positions from the Tab stop position list.

Booking Planner events in Calendar

To help prevent conflicting events and meetings, you can specify that Organizer books a full-day appointment in 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 the time is booked.

1. Go to Planner.
2. Insert or edit a Planner event.
3. Select Book free time.
4. Click OK.

Note Booking free time only affects the display of your free time during scheduling. Organizer will not 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.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Details: Editing a Planner event

Keyboard shortcuts
You can also select a Planner event and then press CTRL+E to edit the event.

Editing a Planner event in other ways
You can also use the mouse to directly edit Planner events. To move the event to a different time period, you can drag and drop the event to the new time. To edit the start time, end time, or duration of the event, you can hold down either end of the event and move the mouse pointers to adjust the event.

Changing the event type
Click the "Event type" box to select an event type from the list that appears.

To change the event types in the Planner key, choose View - Planner Preferences and click Key. In the Planner Key dialog box, click the text in the Planner Key event type you want to change and edit it.

Changing the row number
You can create more than one event on a given day.   Planner days are divided into 4 rows in the Year per Page view and 8 rows in the Quarter per Page view. You can change the row in which you want the event to appear by entering a row number or clicking + (plus) to increase, or - (minus) to decrease the row number. For example, if you want a Planner event to appear in row 2, enter 2 for "Row."

All rows of an event you create in a Quarter per Page view display in Year per Page. However, Organizer combines two rows of the Quarter per Page view to a single row in the Year per Page view.

If you plot Planner events on top of each other or create more events than Planner has rows to display, Planner displays crosshatching to indicate that there's a Planner event you can't see. You can drag the Planner event that's on top to a different row so the events underneath partially show.

Changing the start date, end date, and duration of an event
Click the "From" or "Until" boxes to change the start or end date of an event. Under "Days," you can also click + (plus) and - (minus) to adjust the duration of an event.

Changing the category
Click the "Categories" box and select the categories from the list that appears.

Changing the Book free time option
Select "Book free time." If this option is selected, Organizer books a full-day appointment in Calendar for every day of your event.

Note Booking free time only affects the display of your free time during scheduling. Organizer won't warn you of a conflict if you create 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.

Changing confidentiality
Select "Confidential." If this option is checked, Organizer makes the event confidential, so others who have access to your files can't view it.

{button ,AL(`H_EDITING_A_PLANNER_EVENT_STEPS',1)} Go to procedure

{button ,AL(`;H_EDITING_THE_PLANNER_KEY_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',0)} See related topics

Details: Creating a Planner event

Keyboard shortcuts
You can also create an event by choosing Create - Event or by pressing INS when you're in the Planner section.

Creating a Planner event in other ways
The quickest way to create a Planner event is to use the mouse. Select the type of event you want to work with from the key at the bottom of the Planner page. When you move the mouse pointer over the planner, it turns into a marker. Hold down the mouse on the first day of the event and drag it to indicate the duration of the event. When you release the mouse, Organizer creates the event.

Understanding Planner rows
You can create more than one event on a given day. Planner days are divided into 4 rows in the Year per Page view and 8 rows in the Quarter per Page view. You can change the row in which you want the event to appear, enter a row number or click + (plus) to increase, or - (minus) to decrease the row number. For example, if you want a Planner event to appear in row 2, enter "2" for "Row."

All rows of an event you create in the Quarter per Page view appear in the Year per Page view. However, Organizer combines two rows of the Quarter per Page view to a single row in the Year per Page view.

If you plot Planner events on top of each other or create more events than Planner has rows to display, Planner displays crosshatching to indicate that there's a Planner event you can't see. You can drag the Planner event that's on top to a different row so the events underneath partially show.

Selecting the duration of your event
You can enter an end date to any event and Organizer will automatically adjust the number of days for the event. If you enter a specific number of days, Organizer automatically adjusts the end date.

Reviewing the number of days for each event type
You can move the mouse pointer over an event type in the Planner key and Organizer displays the number of days you committed to that activity for the current year in the box that appears above the Planner key.

Note Booking free time only affects the display of your free time during scheduling. Organizer will not warn you of a conflict if you create 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.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS',1)} Go to procedure
{button ,AL(`;H_EDITING_THE_PLANNER_KEY_STEPS',0)} See related topics

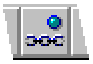
Selecting Planner event options

Option	Result
Categories	Lets you establish one or more categories for the event.
Confidential	Makes or doesn't make (default) the event confidential, so others who have access to your files can't view it.
Book free time	Books a full-day appointment in the Calendar for every day of an event you insert, to prevent conflicting events and appointments. The default is not to book free time.

Note Booking free time only affects the display of your free time during scheduling. Organizer won't warn you of a conflict if you create an appointment during the booked time.

Breaking a linked object's link in Notepad

1. Select the linked object whose link you want to break.
2. Choose Edit - OLE Links.



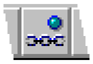
3. From the "Link" list, select the link you want to break.
4. Click Break Link.
5. Click Done.

Note When you break a link, the linked object still appears on your Notepad page, but the link to the original (source) application is now broken. To remove the linked object, delete it from the Notepad page after you have broken the link.

{button ,AL(`H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS',0)} See related topics

Changing how to update a linked object in Notepad

1. Select the linked object whose link update option you want to change.
2. Choose Edit - OLE Links.



3. From the "Link" list, select the link you want to change.
4. Select the update option you want.
5. Click Done.

{button ,AL(`H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_BREAKING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS',0)} See related topics

Creating an embedded object by using drag and drop in Notepad

Before you create an embedded object by using drag and drop, you must first name and save the original (source) application file; the original (source) application must fully support OLE.

1. Click the Notepad page on which you want to embed the object.
2. Click the page to place the cursor on the Notepad page.
3. Arrange the Organizer window and the original (source) application's window so that both are visible at the same time.
4. Select the information you want to embed.
5. Drag the selected information to the Notepad page.

   Note If you have trouble dragging and dropping, consult your original (source) application's documentation for information on how to use drag and drop in that application.
6. Release the mouse button to drop the information on the Notepad page.

   In a moment, your information appears on the page.
7. Click the Notepad page and press F2 to enter the changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_OVERVIEW_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Creating a linked object by using drag and drop in Notepad

Before you create a linked object by using drag and drop, you must first name and save the original (source) application file; the original (source) application must fully support OLE.

1. Click the Notepad page on which you want to create the linked object.
2. Click the page to place the cursor on the Notepad page.
3. Arrange the Organizer window and the original (source) application's window so that both are visible at the same time.
4. Select the information to which you want to link.
5. Hold down CTRL+SHIFT while you drag the selected information to the Notepad page.If you have trouble dragging and dropping, consult your original (source) application's documentation for information on how to use drag and drop in that application.
6. Release the mouse button and the CTRL+SHIFT keys to drop the information on the Notepad page.

   In a moment, your information appears on the page.
7. Click the Notepad page and press F2 to enter the changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_BREAKING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS;H_CREATING_AN_EMBEDDED_OBJECT_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Creating an OLE object in Notepad from an entire file

Entering the path and file name
You can enter the path and file name in the "File" box or click Browse to locate the file you want to use as the source for the OLE object.

Selecting " Link to file"
Select "Link to file" to create a link to the contents of a source file rather than embedding a copy of the whole file.

Displaying the object as an icon
You can display any OLE object as an icon by selecting "Display as icon." Displaying your object as an icon is more manageable than displaying the information associated with the linked or embedded object. When you select "Display as icon," the OLE object appears as an icon. The default icon is the icon for the original (source) application.

Note If you decide to use an icon to represent the object, you must edit the object in a separate window; it can't be edited in place.

{button ,AL(`H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS',1)} Go to procedure

Creating an OLE object in Notepad from an entire file

1. Click the Notepad page on which you want to create an OLE object.
2. Click the page to place the cursor on the Notepad page.
3. Choose Create - Object.

4. Select "Create an object from a file."
5. For "File," enter the path and file name for the file you are using as the source for the OLE object.

   See details

6. To make a linked object, select "Link to file."

   See details

   A description of the object is displayed in the "Result" box.

7. Select "Display as icon" to display an icon that represents the object.

   See details

8. To change the icon that represents the object, click Change Icon.
9. Select the appropriate option.
10. To change the text associated with the icon, enter the new text in the "Label " box.
11. Click OK to confirm your text.
12. Click OK.
13. Click the Notepad page and press F2 to enter the changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Creating an OLE object in Notepad from part of a file

Selecting how to paste the object
Select "Paste" if you want to embed the object in your current file. To create a link to the object in the source file, select "Paste link to source."

Displaying the OLE object as an icon
You can display any OLE object as an icon by selecting "Display as icon."   Displaying your object as an icon is more manageable than displaying the information associated with the linked or embedded object. When you select "Display as icon,"   the OLE object appears as an icon. The default icon is the icon for the original (source) application.

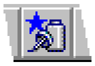
Note If you decide to use an icon to represent the object, you must edit the object in a separate window; it can't be edited in place.

{button ,AL(`H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS',1)} Go to procedure

Creating an OLE object in Notepad from part of a file

To create an OLE object in Notepad from part of a file, the original (source) application from which you'll copy information must support OLE. This procedure assumes you opened the original (source) application and the file from which you'll be copying information. The information must be in a saved file.

1. Select the information from the original (source) application that you want to use as the basis of your OLE object.
2. Choose Edit - Copy.
3. In Organizer, click the Notepad page on which you want the OLE object.
4. Click the page to place the cursor on the Notepad page.
5. Choose Edit - Paste Special.



6. Select the option you want.

   See details
7. Under "As," select the object's type.

   A description of the object is displayed in the "Result" box.
8. Select "Display as icon" to display an icon that represents the object.

   See details
9. To change the icon that represents the object, click Change Icon.
10. Select the appropriate option.
11. To change the text associated with the icon, enter the new text in the "Label" box.
12. Click OK to confirm your text.
13. Click OK.
14. Click the Notepad page and press F2 to enter your changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Creating a new OLE object in Notepad

Displaying the OLE object as an icon
You can display any OLE object as an icon by selecting "Display as icon." Displaying your object as an icon is more manageable than displaying the information associated with the linked or embedded object. When you select "Display as icon," the OLE object appears as an icon. The default icon is the icon for the original (source) application.

Note If you decide to use an icon to represent the object, you must edit the object in a separate window; it can't be edited in place.

{button ,AL(`H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS',1)} Go to procedure

Creating a new OLE object in Notepad

You can create a new worksheet, document, or other object from within Organizer by creating a new OLE object in Notepad. You create a new object to hold information that you're creating for the first time, not from information that already exists in a file. For example, if you're working in Organizer and need to create a new worksheet to store some numbers and calculations, you can create a worksheet object and embed it in Notepad.

1. Click the Notepad page on which you want to create an OLE object.
2. Click the page to place the cursor on the page.
3. Choose Create - Object.

4. From the "Object type" box, select the type of OLE object you want to create.

   A description of the object is displayed in the "Result" box.
5. Select "Display as icon" to display an icon that represents the object.

   See details
6. To change the icon that represents the object, click Change Icon.
7. Select the appropriate option.
8. To change the text associated with the icon, enter the new text in the"Label" box.
9. Click OK to confirm your text.
10. Click OK.
11. Click the Notepad page and press F2 to enter your changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Editing an embedded object in a separate window
Applications that don't support the in-place editing of embedded objects allow you to edit embedded objects in a separate window. When you double-click an embedded object to edit it in a separate window, Organizer starts the original (source) application for the embedded object.

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_AS_A_SEPARATE_FILE_IN_NOTEPAD_STEPS',1)} Go to procedure

Editing an embedded object in a separate window

If the object's source application fully supports OLE, you can edit the object in place. Otherwise, follow the procedure given below.

1. Click the embedded object to select it in the Notepad page.
2. Double-click the object to open the object's application window.
3. Edit the embedded object.
   See details
4. In the object's application, choose File - Update (Lotus Organizer).
5. Depending on the object's application, choose File - Exit or File - Exit & Return to (Lotus Organizer).
6. Click the Notepad page and press F2 to enter your changes.

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_AS_A_SEPARATE_FILE_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EDITING_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_EDITING_AN_EMBEDDED_OBJECT_INPLACE_IN_NOTEPAD_STEPS',0)} See related topics

Details: In-place editing an embedded object in Notepad

Understanding in-place editing

Applications that fully support OLE functionality let you edit embedded objects in place. This means you edit the object inside the Organizer window. When you double-click an embedded object that can be edited in place, the following actions occur:

- The selected object looks as though it's still embedded in Organizer.
- The Organizer menus and tools change to match the original (source) application's menus (except for the Organizer File and Section menus).
- Part of the original (source) application's frame may appear in and around the embedded object. For example, spreadsheet rows, columns, and gridlines may appear if the embedded object is from a spreadsheet.

Check the documentation for the original (source) application to determine if it supports all OLE functionality.

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_INPLACE_IN_NOTEPAD_STEPS',1)} Go to procedure

In-place editing an embedded object in Notepad

Check the documentation for the original (source) application to make sure it supports the OLE in-place editing capability.

1. Click the embedded object to select it in the Notepad page.
2. Double-click the embedded object to edit.

   See details
3. Edit the embedded object.
4. Click the Notepad page outside the embedded object and press F2 to enter your changes.

Note You can't use in-place editing for linked objects or objects displayed as icons.

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_INPLACE_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EDITING_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_EDITING_AN_EMBEDDED_OBJECT_AS_A_SEPARATE_FILE_IN_NOTEPAD_STEPS',0)} See related topics

Details: Editing a linked object's link in Notepad
You can change the source for a link in the Edit Link dialog box. For example, if the directory of the original (source) file changes, or if the name of the original (source) file changes, you need to modify your links to reflect the changes.

Editing the linked object's link
Click the "Look in" box to select the path where the original (source) file is located, enter the name of the original (source) file in the "File name" box, and/or click the "Files of type" box to select the type of file you want.

{button ,AL(`H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS',1)} Go to procedure

Editing a linked object's link in Notepad

1. Select the linked object whose link you want to edit.
2. Choose Edit - OLE Links.
3. In the "Link" box, select the link to edit.
4. Click Edit Link.
5. Edit the link.

   See details
6. Click OK.
7. Click Done.

Note If you move an original file, you must edit the link information for all links to that file.

{button ,AL(`H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_BREAKING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER',0)} See related topics

Overview: Editing embedded objects in Notepad

There are two ways that you can edit embedded objects in Notepad. You can edit the object "in place," or you can edit it in a separate window. The type of editing that's available depends on how the object's source application supports OLE and on the type of object you created.

Supporting OLE

All applications that support OLE let you edit embedded objects. Some applications require that you edit the object in the application's window; others let you edit the object in place. If the object's source application fully supports OLE functionality (if the Organizer menus change when you double-click the object), you can edit the object in place.

Editing in a separate window

When you create embedded objects in Notepad, you can create different types of objects, including embedded objects and embedded objects that are linked to a source file. You can choose to display the object's contents or to represent the object with an icon. The type of object affects the way you can edit. You must edit the following types of objects in a separate window:

- Objects whose source application doesn't support in-place editing
- Objects that are linked to a source file
- Objects that are displayed as an icon

When you edit one of the above types of object, a separate window for the object's application opens. You edit the object in that window, update your Organizer file from the application's window, and exit the application and return to Organizer.

Editing in place

When you edit an embedded object in place, you can still see the rest of the destination document (Notepad page) in a single window. The menus and other tools in the window all belong to the original (source) application for the embedded object you're editing except for the Organizer File and Section menus. You can edit in place the following types of objects:

- Objects whose source application supports in-place editing
- Embedded objects that aren't linked to a source file
- Objects that aren't represented by icons

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_AS_A_SEPARATE_FILE_IN_NOTEPAD_STEPS;H_EDITING_AN_EMBEDDED_OBJECT_INPLACE_IN_NOTEPAD_STEPS',0)} See related topics

Overview: Embedded objects in Notepad

You can embed objects in Notepad from any applications that support OLE.

Creating embedded objects in Notepad

You can create embedded objects from all or from part of an existing file, or you can create a new embedded object. You can display the contents of the embedded object you create, or you can choose to display the embedded object as an icon. When you display the embedded object as an icon, you can use the icon from the object's original (source) application or you can choose a different icon.

- **Creating embedded objects with commands**

  You embed objects using Edit - Paste Special or Create - Object. These commands are similar, but you use Edit - Paste Special to embed an object you have either copied or cut from the file of another application. You use Create - Object to embed an entire file or to create a new OLE object.

- **Creating embedded objects with drag and drop**

  Organizer supports the drag and drop features of OLE. If the application you're sharing information with also supports OLE drag and drop, you can create embedded objects by dragging the information from the application and dropping it in Notepad.

{button ,AL(`H_CREATING_AN_EMBEDDED_OBJECT_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS',0)} See related topics

Overview: Linked objects in Notepad

A linked object lets you connect information from the original (source) file (for example, Lotus 1-2-3) with a destination file (for example, your Organizer Notepad). You can choose to update linked objects manually or automatically. When you create a linked object with automatic update, the destination file is automatically updated so that it reflects changes made in the original (source) file.

For example, let's say you want to use information from a Lotus 1-2-3 worksheet and see it in your Notepad section, and the Lotus 1-2-3 worksheet information changes weekly. You can embed the Lotus 1-2-3 worksheet and create a linked object so that whenever you open your Notepad section, the worksheet automatically appears with the latest updates.

Creating linked objects in Notepad

You can create linked objects from a Notepad page to other applications.

- **Creating linked objects with commands**

  You create object links using Edit - Paste Special or Create - Object. These commands are similar, but you use Edit - Paste Special to paste a link to specific information you copied in the file of another application. You use Create - Object to create a link to an entire file.

- **Creating linked objects with drag and drop**

  Organizer supports the drag and drop features of OLE. If the application you're sharing information with also supports OLE drag and drop, you can create a linked object by dragging the information (while holding down CTRL+SHIFT) from the application and dropping it in Notepad.

Managing linked object links

You can view, edit, update, and break linked object links by choosing Edit - OLE Links. For example, you can edit a link so that it refers to a different piece of information in the original (source) application, or you can change a link's update mode from automatic to manual.

{button ,AL(`H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_BREAKING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS;H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS',0)} See related topics

Overview: Sharing information using OLE in Notepad

Object Linking and Embedding (OLE) lets you share information across applications. Depending on the task, you can either create a link or embed the information.

Understanding when to use linked objects

A linked object lets you connect information from a source file (for example, a Lotus 1-2-3 worksheet) with a destination file (for example, your Organizer Notepad page). When you update linked objects, the latest information from the source file appears in the destination file.

Use linked objects when all of the following circumstances are true:

- You need to share information between Windows applications.
- You expect the shared information to change.
- You need to update the shared information whenever the source file's information changes.

For example, let's say you want to use information from a Lotus 1-2-3 worksheet and see it in your Notepad section, and the Lotus 1-2-3 worksheet information changes weekly. You can create a linked object so that whenever you open your Notepad section, the worksheet automatically appears with the latest updates.

You don't need to use linked objects when any one of the following circumstances is true:

- You use the information in only one application.
- You don't expect the information to change.
- You don't need to update the shared information when the original (source) information changes.

For example, let's say you created your company logo in Lotus Freelance Graphics and you want to use the logo on a Notepad page. In this example, you shouldn't use a link because it is unlikely the logo will change. Instead, you could simply copy the logo in Lotus Freelance Graphics and paste it on your Notepad page.

Understanding when to use embedded objects

An embedded object lets you create information in one application (for example, a Lotus Word Pro document) but store the information in a file in another application, called the container application (for example, Organizer).

Use embedded objects when both of the following circumstances are true:

- You use the information in the container application.
- You expect to edit or update the information.

For example, if you make a marketing presentation in a Word Pro document, you can embed the Word Pro document on a Notepad page. When you distribute it for others to review, if your reviewers want information from the Word Pro document, they can simply double-click the Word Pro icon to open the file that contains your information.

{button ,AL(`H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CREATING_AN_EMBEDDED_OBJECT_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS;H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS;',0)} See related topics

Selecting icon options for OLE objects

Option	Result
Current	Uses the current icon to represent the object (default).
Default	Uses the application's default icon to represent the object.
From File	Uses the icon from the file specified to represent the object.

Selecting the type of OLE object you want

Option	Result
Paste	Pastes (default) the information from the original (source) application in the format you select, for example, Formatted Text (RTF), Unformatted Text, Enhanced metafile picture, and so on.
Paste link to source	Pastes a link to the information you selected in the original (source) application, for example, a link to a Word Pro document, a link to a 1-2-3 worksheet, and so on.

Selecting update options

Option	Result
Automatic	Updates the linked object automatically when you open the Notepad page that contains the link. Also updates the linked object whenever changes are made to the original file. Use "automatic" to ensure your information is always current.
Manual	Updates the linked object only when you click Update Now in the OLE Links dialog box. Use "Manual" when you have many links, or the link is to a large file and automatically updating the linked object would be slow.

Calendar layouts

Calendar List	Daily Trifold Timeline
Daily Calendar/To Do	Monthly Calendar
Daily Calendar/To Do/Calls	Meeting reports
Daily Page	Multiple Calendar
Daily Timeline	Weekly 2-Page
Daily Trifold Deluxe List	Weekly Timeline
Daily Trifold Deluxe Timeline	Weekly Work Timeline
Daily Trifold List	Yearly Calendar

Overview: Organizer print layouts

What you print reflects the layout you select rather than what you see on your computer screen. A print layout lets you customize what you print. That is, you can select a print layout that prints your information as you would like to see it. Organizer includes many predefined layouts, with specific layouts associated with each Organizer section. For example, you can:

- Use a label layout to print your Address records.
- Use the Monthly Calendar layout to print your Calendar appointments.
- Select a layout that prints information from more than one Organizer section.
- Select a layout that matches your paper datebook (for example a Franklin Day Planner Classic or DayRunner Classic).

In most cases you won't need to change the predefined layouts; however, you can customize these layouts if you want to.

The following tables list all Organizer layouts by section. You can see illustrations of these layouts in the Layouts dialog box. (Choose File - Print. Click Layouts. When you select a layout, a small illustration of that layout appears in the dialog box.) You can also see these illustrations in *Print Layout Guide*.

Calendar

Calendar List	Daily Trifold Timeline
Daily Calendar/To Do	Meeting report
Daily Calendar/To Do/Calls	Monthly Calendar
Daily Page	Multiple Calendar
Daily Timeline	Weekly 2-Page
Daily Trifold Deluxe List	Weekly Timeline
Daily Trifold Deluxe Timeline	Weekly Work Timeline
Daily Trifold List	Yearly Calendar

To Do

Daily Calendar/To Do	Daily Trifold Timeline
Daily Calendar/To Do/Calls	Monthly To Do
Daily Trifold Deluxe List	Status Report
Daily Trifold Deluxe Timeline	To Do List
Daily Trifold List	

Address

Address Card	Full Address Card
Address Card (Rolodex)	Label
Contact Card	Phone List
Envelope	

Calls

Calls Card	Daily Trifold Deluxe List
Calls List	Daily Trifold Deluxe Timeline
Daily Calendar/To Do/Calls	Monthly Calls

Planner

Daily Trifold Deluxe List	Planner List
Daily Trifold Deluxe Timeline	Quarterly Planner
Monthly Planner	Yearly Planner

Notepad

Notepad Contents	Notepad Pages
Notepad Contents and Pages	

Anniversary

Anniversary List	Daily Trifold Deluxe Timeline
Daily Trifold Deluxe List	Monthly Anniversary

Calendar tab
The section tab of the currently-displayed section, which is Calendar. Tabs for other Organizer sections appear on the left edge of the Organizer binder. To turn to a section, you can click the section tab.

Calendar page

Entries you make in Organizer appear in the appropriate section's page. To create an entry, you can double-click anywhere in the date area of the page.

The Calendar page lets you manage your time and view appointments at a glance. You can schedule appointments, show information in one section from other sections, and customize the appearance of the section by selecting what you want to view and how you want the information sorted.

Clock icon
Displays the current time set by your computer.

Close button
Closes Organizer.

Windows control menu
Displays the Windows control menu commands.

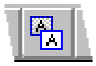
Today's date icon
Displays today's date. You can click here to move to today's date in Calendar.

Hide SmartIcons menu

Displays menu for hiding SmartIcons.

Option	Result
Hide this bar of SmartIcons	Hides the set of SmartIcons that is marked with a check at the bottom of the drop-down menu, for example, Universal.
Hide all SmartIcons	Hides all sets of SmartIcons available to you in Organizer.
SmartIcons Setup	Opens the SmartIcons Setup dialog box.

SmartIcons
Set of icons (called SmartIcons) that are symbols on buttons, providing one-click shortcuts to perform Organizer functions and commands.

For example,  copies an object you select to Clipboard.

If you're using Organizer with a mouse, you can use bubble help to see what each icon does.   Bubble help is initially turned on in Organizer (default).
To turn off bubble help, choose Help - Bubble Help, press CTRL+F1, or click .
With bubble help on, a description of each icon appears in a bubble when you move the mouse pointer over the icon.

Maximize button
Maximizes the window so it fills the entire screen.

Menu bar
Contains the commands you use in Organizer to perform an action.

Click a command to choose it.

Minimize button
Minimizes the window so that it appears as an icon on your Windows Taskbar.

Page turners
Turns the page to display the previous or next page in the Organizer notebook.

Restore button
Restores a window to its previous size.

Section tabs
Display each section of Organizer. To turn to a section, you can click the section tab.

Toolbox
The Toolbox icons provide one-click shortcuts to perform the most commonly used Organizer functions and commands.

For example,  creates an appointment in Calendar.

If you're using Organizer with a mouse, you can use bubble help to see what each icon does.
Bubble help is initially turned on (default). To turn off bubble help, choose Help - Bubble Help, press CTRL+F1, or click .
With bubble help on, a description of each icon appears in a bubble when you move the mouse pointer over the icon.

Trash icon

Delete an entry by dragging and dropping it to  .

View and Sort icons

Displays the current Organizer section in different ways. Each section has its own set of View or Sort icons.

For example, these icons, the Calendar View icons, display Calendar pages as single days, a week, 2 weeks, or a month.

Canceling an alarm

You can cancel an alarm that you've set.

1. Edit the entry for which you've set the alarm.
2. Click Alarm.
3. Click Cancel Alarm.
4. Click OK to confirm your choice.
5. Click OK.

{button ,AL(`H_RESPONDING_TO_AN_ALARM_STEPS;H_EDITING_A_REPEATING_ENTRY_DETAILS;H_DELETING_A_REPEATING_ENTRY_STEPS',0)} See related topics

Changing your repeating entries

When you change a repeating entry, the changes you make affect the repeating entry as it represents one specific group; the changes you make don't affect all repeating entries in Organizer.

Option	Result
Just this one	Changes the selected entry only; for example, your weekly Tuesday meeting is changed for one Tuesday.
All	Changes the repeating entry entirely; for example, all of your weekly Tuesday meetings are changed.
All previous	Changes the selected and all previous repeating entries for the specific group; for example, your weekly meeting is changed from the specified date and any previous dates.
All future	Changes the selected repeating entry and all future repeating entries for the specific group; for example, your weekly Tuesday meeting is changed from the specified date and any future dates.
All until	Changes the selected repeating entry and all future repeating entries for the specific group until the date you specify; for example, until two months from today, your weekly Tuesday meeting is changed.

Details: Creating an entry

Creating an entry from within a section

You can also press INS or click the Create icon to create an entry in the section you are in.

In addition, you can choose the following commands from within the appropriate section. For example, you can choose Create - Appointment in the Calendar section; choose Create - Task in the To Do section; choose Create - Call in the Calls section, and so on.

Command	Result
Create - Appointment	Displays the Create Appointment dialog box where you can create a Calendar appointment.
Create - Task	Displays the Create Task dialog box where you can create a To Do task.
Create - Address	Displays the Create Address dialog box where you can create a business or home address.
Create - Call	Displays the Create Call dialog box where you can create a call.
Create - Event	Displays the Create Event dialog box where you can create a Planner event.
Create - Page	Displays the Create Page dialog box where you can create a Notepad page.
Create - Anniversary	Displays the Create Anniversary dialog box where you can create an anniversary.

Choosing any kind of entry from any other section

Let's say you're in the Calendar section, and you remember a task you must complete before you go to the appointment you've just scheduled. Choose Create - Entry In (Calendar, To Do, Address, Calls, Planner, Notepad, Anniversary) and select To Do. Even though you're still in the Calendar section, the Create Task dialog box appears where you can enter your task information without leaving the section you're in.

{button ,AL(`H_CREATING_AN_ENTRY_STEPS',1)} Go to procedure

Creating an entry

You can create entries in any section of Organizer without needing to go to the section where you want the entry to be created.

1. Choose Create - Entry In and choose the type of entry you want to create.

   See details

2. Select the options you want and enter information appropriate to the type of entry you're creating.
3. Click OK.

{button ,AL(`H_CREATING_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_REPEATING_ENTRY_STEPS;H_MAKING_AN_APPOINTMENT_STEPS;H_INSERTING_AN_ANNIVERSARY_STEPS;H_INSERTING_A_PLANNER_EVENT_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS;H_INSERTING_A_CALL_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_INSERTING_A_NOTEPAD_PAGE_STEPS',0)} See related topics

Details: Creating a repeating entry

Understanding Repeats
When you create a repeating entry, you must select the type of repeating entry you want, such as Daily, Weekly, Custom, and so on; and you must also select the frequency with which you want your entries to repeat, such as Every day, each Tuesday and Thursday, and so on.

There are numerous "Repeats" options available to you. Click the boxes to see them.

Using Custom dates
You can make your entries repeat on dates you select through the "Custom dates" options. Select custom dates by selecting the option from the top box under "Repeats." Then click the box under "Custom dates" and select the dates you want. Select one date at a time and click Add to add it to your "Custom dates" list under "Repeats." You can remove a date from your list by selecting the date and then clicking Remove.

Setting the duration for repeating entries
Under "Duration," select the period of time during which your entries will repeat. Select "Until" to select through what date the entry will repeat; or select "For" to select a specific number of days, weeks, months, or years for the entry to repeat.

Selecting weekend options
When you create a repeating entry, a date in the repeating series may fall on a Saturday or Sunday. You can set your repeating entry to occur on a weekend or not. Click the "At weekends" box to select the appropriate option.

- **Don't move**

  If a repeating entry occurs on a Saturday or Sunday and you don't want to change it, select Don't move (default).
- **Move to Friday**

  If a repeating entry occurs on a Saturday or Sunday and you want it to occur on the preceding Friday, select Move to Friday.
- **Move to Monday**

  If a repeating entry occurs on a Saturday or Sunday and you want it to occur on the following Monday, select Move to Monday.
- **Move to nearest weekday**

  If a repeating entry occurs on a Saturday or Sunday and you want it to occur on either the preceding Friday or the following Monday, select Move to nearest weekday.
- **Delete**

  If a repeating entry occurs on a Saturday or Sunday and you want to delete that entry rather than move it to a Friday or Monday, select Delete.

Tip To clear your selections without closing the Repeats dialog box, click Reset.

{button ,AL(`H_CREATING_A_REPEATING_ENTRY_STEPS',1)} Go to procedure

Creating a repeating entry

You can create any variation of repeating entries. For example, you could create weekly meetings in Calendar, bi-weekly tasks in To Do, daily phone calls in Calls, and so on.

1. Create or edit an entry.
2. Click Repeat.
3. Select the appropriate options.
   See details
4. Click OK to confirm your selection.
5. Click OK.

{button ,AL(`H_CREATING_A_REPEATING_ENTRY_DETAILS',1)} See details

{button ,AL(`H_USING_TIME_TRACKER_STEPS;H_EDITING_A_REPEATING_ENTRY_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_RESPONDING_TO_AN_ALARM_STEPS',0)} See related topics

Deleting a repeating entry

1. Select the repeating entry you want to delete.
2. Drag and drop the entry to in Toolbox.
3. Select the appropriate options.
4. Click OK.

{button ,AL(`H_CREATING_A_REPEATING_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Deleting a repeating entry

When you delete a repeating entry, the deletion affects the repeating entry as it represents one specific group; the deletion doesn't affect all repeating entries in Organizer.

Option	Result
Just this one	Deletes the selected entry only; for example, your weekly Tuesday meeting is deleted for one Tuesday.
All	Deletes the repeating entry entirely; for example, your weekly Tuesday meeting is deleted completely.
All previous	Deletes the selected repeating entry and all previous repeating entries for the specific group; for example, your weekly Tuesday meeting is deleted from the specified date and any previous dates.
All future	Deletes the selected repeating entry and all future repeating entries for the specific group; for example, your weekly Tuesday meeting is deleted from this week and any future dates.
All until	Deletes the selected repeating entry and all future repeating entries for the specific group until the date you specify; for example, until two months from today, your weekly Tuesday meeting is deleted.

Details: Editing a repeating entry

Keyboard shortcuts
You can also press CTRL+E to edit a repeating entry you selected.

Understanding what information you can change in repeating entries
You can change information for a repeating entry, but you can't change the repeat pattern of repeating entries.

For example, if you have an appointment that repeats, you can change the appointment text, the appointment time, and any attributes you assigned to it, such as confidential, cost code, alarm, and so on.

You can also change the appointment date as long as the repeat pattern stays the same. For example, if you have a repeating weekly Monday appointment, you can change it to Tuesday because the repeat pattern is the same, that is, one appointment per week. Namely, only the day has changed.

If you need to change a weekly Monday appointment to every other Monday, you must the delete the repeating appointment and create a new repeating appointment.

{button ,AL(`H_EDITING_A_REPEATING_ENTRY_STEPS',1)} Go to procedure

Editing a repeating entry

You can edit specific information in repeating entries, but you can't edit the repeat pattern of repeating entries.

1. Double-click the repeating entry you want to edit.
2. Edit the entry.

   See details
3. Click OK.

   The Change Repeating Appointment dialog box appears.
4. Select the appropriate options.
5. Click OK.

Note If you make any change to a repeating appointment, Organizer automatically displays a dialog box asking if you want to change all the repeating appointments. The options for changing all the repeating appointments are the same options as those listed in Step 4.

{button ,AL(`H_EDITING_A_REPEATING_ENTRY_DETAILS',1)} See details

{button ,AL(`H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_USING_TIME_TRACKER_STEPS',0)} See related topics

Overview: Alarms

You can set alarms in the Calendar, To Do, Calls, Planner, and Anniversary sections. Organizer can start an application automatically for you—such as a spreadsheet or a word processing application—if you set an alarm and specify what application you want to start. You can open a file, remind yourself of an appointment, or remind yourself to make an important phone call simply by setting an alarm. You can also display a message when your alarm goes off, for example, "Bring financial forecasts to meeting!"

{button ,AL(`H_LAUNCHING_ANOTHER_APPLICATION_FROM_ORGANIZER_STEPS;H_RESPONDING_TO_AN_ALARM_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS',0)} See related topics

Responding to alarms

Command button or option	Result
Start	Starts (default) or doesn't start an application when the alarm goes off.
Snooze for	Indicates the number of minutes the alarm is deferred.
Snooze	Defers the alarm for the number of minutes specified. (This works in conjunction with "Snooze for.")
Turn to	Turns to the entry for which the alarm was set.

Details: Responding to an alarm

Closing the Alarm dialog box
You can click OK to close the Alarm dialog box.

Canceling starting an application
To cancel starting an application, click "Start" to deselect it, and click OK.

Using Snooze
You can reset the alarm to go off again at another time.

Let's say you set an alarm to start an application at a specific time, but when that alarm goes off, you want more time to finish what you're working on before Organizer starts the other application. For "Snooze for," press + (plus) to increase or - (minus) to decrease the time you want and click Snooze.

Using Turn To
You can click Turn To to see the entry for which you set the alarm and click OK.

{button ,AL(`H_RESPONDING_TO_AN_ALARM_STEPS',1)} Go to procedure

Responding to an alarm

You can respond to an alarm by choosing any of the Alarm options.

See details

Note When the alarm goes off, the Alarm dialog box appears, unless you deselect "Display alarm" when you set the alarm.

{button ,AL(`H_RESPONDING_TO_AN_ALARM_DETAILS',1)} See details

{button ,AL(`H_CREATING_AN_ENTRY_STEPS;H_USING_TIME_TRACKER_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;',0)} See related topics

Selecting alarm options

Option	Result
On	Indicates that the alarm will go off on the date and time specified in the "Date" and "Time" boxes.
Date	Represents the date the alarm will go off.
Time	Represents the time the alarm will go off.
Before	Indicates that the alarm will go off a specified number of minutes before the time that the entry is set for. (This works in conjunction with "Number of minutes.")
After	Indicates that the alarm will go off a specified number of minutes after the time that the entry is set for. (This works in conjunction with Number of minutes.)
00h 5 +/- (Number of minutes)	Sets the alarm to go off a specified number of minutes before or after the time that the entry is set for. The default is 5 minutes. (This works in conjunction with "Before" and "After.")
Tune	Plays the selected tune when the alarm goes off.
Message	Displays a message when the alarm goes off.
Start	If an application was specified when the alarm was set, the application starts when the alarm goes off.
Display alarm	Displays (default) the Alarm dialog box when the alarm goes off.

Details: Setting alarms for an entry

Setting the alarm for a specific date and time
You can specify the date and time for the alarm to go off. In the Alarm dialog box, select "On" and click the "Date" and "Time" boxes for when you want the alarm to go off.

For example, if you're setting an alarm for an anniversary you want to remember, you can set the alarm to go off the day before the special day.

Setting the alarm to go off minutes before or after the time of the appointment
You can set the alarm to go off minutes before or after the time you scheduled your appointment for. To do this, select the number of minutes you want by clicking + (plus) to increase or - (minus) to decrease the time and then selecting "Before" or "After."

For example, if you're setting an alarm for a meeting you must attend on March 14 at 10:30 a.m., you can give yourself a few additional minutes to finish up what you'll be working on if you set the alarm to go off 10 minutes before the meeting time.

Selecting a tune for your alarm
You select a tune for your alarm by clicking the "Tune" box and selecting what you want. The default tune is the sound of an alarm clock, but you can select another tune. You can hear each tune by selecting a tune and then clicking Play.

Displaying a message with your alarm
If you want a message displayed when your alarm goes off, for "Message," enter the message you want displayed. For example, "Bring financial forecasts to meeting!"

Starting an application with an alarm
You can start an application, open a file, and so on, in conjunction with setting an alarm. For "Start," enter what you want to start. If necessary, click Browse for a listing of your files and applications.

What happens when the alarm goes off
When your alarm goes off, Organizer displays (default) the Alarm dialog box associated with the alarm you've set. The Alarm dialog box contains the information you entered when you set the alarm. If you don't want the Alarm dialog box to appear, deselect "Display alarm."

{button ,AL(`H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS',1)} Go to procedure

Setting alarms for an entry

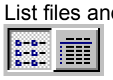
You can set alarms in Calendar, To Do, Calls, Planner, and Anniversary.

1. Create or edit an entry.
2. Click Alarm.
3. Select the appropriate options.
   See details
4. Click OK to confirm your alarm settings.
5. Click OK.

{button ,AL(`H_SETTING_ALARMS_FOR_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_USING_TIME_TRACKER_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_DETAILS;H_RESPONDING_TO_AN_ALARM_STEPS;H_LAUNCHING_ANOTHER_APPLICATION_FROM_ORGANIZER_STEPS',0)} See related topics

Using browse icons

Option	Results
Up one level 	Takes you up one level in the directory hierarchy.
Create new folder 	Lets you create a new folder.
List files and display details 	Lists the files in the selected folder or displays the file details, such as the file size, file type, and the last date the file was modified.

Details: Using time tracker

Changing the time in other ways

To change the start time or end time of an appointment with time tracker, press or ↓ .

To change the duration time of an appointment with time tracker, press and hold SHIFT while you press   or ↓ .

{button ,AL(`H_USING_TIME_TRACKER_STEPS',1)} Go to procedure

Using time tracker

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

1. Create or edit an appointment in Calendar.
2. Click the "Time" box to display time tracker.
3. To change the start time of an appointment, drag the top clock on time tracker.
4. To change the end time of an appointment, drag the bottom clock on time tracker.
5. To move the entire appointment, drag time tracker using the duration time (the center bar) in the middle.
6. Click OK.

{button ,AL(`H_USING_TIME_TRACKER_DETAILS',1)} See details

{button ,AL(`H_CREATING_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_STEPS;H_DELETING_A_REPEATING_ENTRY_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_RESPONDING_TO_AN_ALARM_STEPS',0)} See related topics

Changing connection properties for a dialing device

Option	Result
Data Bits	Lets you select the data bits for connections you make using the current dialing device and the COM port.
Parity	Lets you select the parity for connections you make using the dialing device and the COM port.
Stop Bits	Lets you select the stop bits for connections you make using the dialing device and the COM port.
Wait for dial tone before dialing	Waits (default) or doesn't wait for a dial tone before dialing, if your modem supports it. Deselect this option if your modem isn't recognizing the dial tone in your current location, or if you manually dial your phone.
Cancel the call if not connected within 60 secs	Cancels the call if the call isn't completed within the specified number of seconds, if your modem supports it. (The default is 60 seconds.)
Disconnect a call if idle for more than 30 mins	Hangs up the phone if there's no activity within the specified number of minutes. (The default is 30 minutes.)
Port Settings	Lets you specify port settings for ports from other manufacturers. See your port hardware documentation for more information about the available settings.
Advanced	Lets you specify types of error and flow control for the connection and other modem settings. These settings force error checking, but they may make your connection less reliable.

Details: Changing telephone dialing preferences

Selecting the dialing device
If you installed and setup more than one dialing device in the Windows 95 Control Panel, you can specify another dialing device you want Organizer to use to dial telephone numbers.

Selecting the device address
A device address indicates a particular telephone line that's available for your dialing device. A modem dialing device typically has only one telephone line available, so there will be only one entry in the list, Address 0.

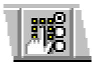
Selecting the Organizer Address section
If you have more than one Address section in your Organizer file, you can specify the Address section you want Organizer to use when you select a contact name or company for a Calls entry. The default for "Search for name & companies in" is the Address section named Address or the first address section in the tab order. If you don't have an Address section in your Organizer notebook, the default is None.

{button ,AL(`H_CHANGING_DIALER_PREFERENCES_STEPS',1)} Go to procedure

Changing telephone dialing preferences

Telephone dialing preferences determine the device and settings Organizer uses to dial telephone numbers and the Address section Organizer uses to look for telephone numbers. Changing telephone dialing preferences is optional; if you don't change your telephone dialing preferences, Organizer uses the default preferences.

1. Choose File - User Setup -Telephone Dialing.



2. Under "Dial using," click the "Device" box and select the dialing device you want.

   See details
3. If necessary, click the "Address" box and select the appropriate device address.

   See details
4. (Optional) Click Configure to change the properties of the device you selected in step 2.

   You can change general properties by clicking the General tab, connection properties by clicking the Connection tab, and options properties by clicking the Options tab.
5. Click OK when you finish configuring your dialing device.
6. Under "Phone number lookup," click the "Search for name & companies in" box and select the Organizer Address section you want.

   See details
7. Click OK.

{button ,AL(`H_CHANGING_DIALER_PREFERENCES_DETAILS',1)} See details

{button ,AL(`H_DIALING_A_NUMBER_STEPS;H_DIALING_A_NUMBER_QUICKLY_STEPS;H_CHANGING_MODEM_SETTINGS_STEPS',0)} See related topics

Changing general properties of a dialing device

Option	Result
Port	Lets you select the port on your computer your dialing device is connected to, if your dialing device uses a different port.
Speaker volume	Lets you adjust the speaker volume for the dialing device, if it supports sound.
Maximum speed	Lets you select the speed the dialing device will use to connect, if your dialing device supports it.
Only connect at this speed	Lets you prevent your dialing device from connecting at lower speeds if it is unable to connect at the higher speed you selected in the "Maximum speed" box, if your dialing device supports it.

Changing options for a dialing device

Option	Result
Bring up terminal window before dialing	Displays or doesn't display (default) a terminal window so that you can type commands directly to the dialing device before you dial.
Bring up terminal window after dialing	Displays or doesn't display (default) a terminal window so that you can type commands directly to the dialing device after you dial.
Operator-assisted or manual dial	Disables dialing from the dialing device and lets you dial the phone number yourself.
Wait for credit card tone	Lets you specify how many seconds to wait for a credit card tone before continuing dialing. (The default is 8 seconds.)
Display modem status	Displays (default) or doesn't display a status window that shows the progress of the dialing device's connection.

Details: Dialing a number

Keyboard shortcut
You can also press CTRL+D to dial a number.

Dialing a number in other ways
You can dial the number of a Calls entry you created by clicking Dial in the Create Call or Edit Call dialog box.

Entering the contact name and company
If you entered names and addresses in the Address section, they appear in the "First name," "Last name," and "Company" boxes.

Organizer attempts to match any part of the Address record you specify with the rest of the Address record. For example, if you click the "Last name" box and select a name from the list, Organizer supplies the person's company name and phone number.

Entering the contact phone number
After you select a contact name or company name, you can click the "Phone at" box to select any phone number associated with that name or company. If you don't use an Address record to specify information for your call, the "Phone at" box uses "The phone number entered below." In this case you must specify a phone number for the "Phone number" box.

Note If you use a phone number from an Address record to dial a call, you must include ( ) (parentheses) around the phone number's area code in the Address record, for example, (508) 555-1234.

Specifying the dialing from location for a Calls entry
You can select the location you're dialing from if you set up more than one location.

Clicking Dialing properties
When you click Dialing properties, if your modem is installed and configured, you can add locations and change existing locations. Organizer displays the Windows 95 Dialing Properties dialog box, and you can make your changes. You can specify a particular telephone area code and country code to use. You can also specify numbers that let you access an outside line (such as 9), or use a calling card number. You can set dialing properties for different locations, for example, from home, work, or a hotel so that you can easily switch from one location to another.

You can also make these changes in the Windows 95 Control Panel, under "Modems."

Note When you make changes to a location or choose a different location in the Dialing Properties dialog box, the changes you make affect all applications that use this information, not just Organizer.

Specifying the dial using device for a Calls entry
If you're dialing a telephone number from Organizer and you set up more than one telephone device for your system, you can choose another telephone device to dial a number. The default is whatever you specify when you choose File - User Setup - Telephone Dialing.

Configuring your dialing device
If you already configured your modem in the Windows 95 Control Panel, you can make changes to your modem setup. Click Configure; Organizer displays the Windows 95 Modem Properties dialog box, and you can make your changes. Changes you make to the configuration of a dialing device from Organizer are only in effect for the current Organizer session, and don't affect other applications. You can also make these changes in the Windows 95 Control Panel, under "Modems."

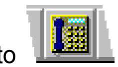
Tracking Calls entries you dial
To create a Calls entry for the phone number you dial, under "Log call" in the Dialing dialog box, click Answered, No Answer, Left Message, or Busy. Organizer displays the Create Call dialog box with information about the current Calls entry filled in.

{button ,AL(`H_DIALING_A_NUMBER_STEPS',1)} Go to procedure

Details: Dialing a number quickly

Keyboard shortcut
You can also dial a number by selecting an entry that includes the number and pressing CTRL+Q.

Dialing a number quickly in other ways

You can also dial a phone number quickly by dragging and dropping the entry that includes the number to  in Toolbox.

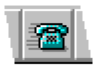
{button ,AL(`H_DIALING_A_NUMBER_QUICKLY_STEPS',1)} Go to procedure

Dialing a number quickly

Organizer can automatically dial any phone number that appears with an entry in your To Do, Address, Calls, or any other section. You must have a modem installed and connected to dial phone numbers.

Note The number you dial must include () (parentheses) around the area code, for example, (508) 555-1234.

1. Select an entry that includes a phone number.
2. Choose Phone - Quick Dial.



The Dial dialog box appears with information from the entry you selected filled in the appropriate fields.

3. Click Dial.

   Organizer dials the phone number and then displays the Dialing dialog box.

4. Depending on the result of your call, click Hangup to end the call, click Redial to try dialing the phone number again, or click OK to leave the dialog box.

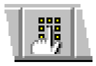
{button ,AL(`H_DIALING_A_NUMBER_QUICKLY_DETAILS',1)} See details

{button ,AL(`H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_STEPS;H_SELECTING_A_DIALING_FROM_LOCATION_AND_CONFIGURING_YOUR_MODEM_STEPS',0)} See related topics

Dialing a number

You must install and set up a modem to dial phone numbers.

1. Choose Phone - Dial.



2. Enter the contact's first name, last name, and company.

   See details

3. Click the "Phone at" box and select the telephone number you want to use.

   See details

4. Under "Phone number," specify the appropriate options.
5. (Optional) Click the "Dialing from" box and make your selection.

   See details

6. (Optional) Click Dialing Properties and select the appropriate options for the location you're dialing from.

   See details

7. (Optional) Click the "Dial using" box and make your selection.

   See details

8. (Optional) Click Configure to change the properties of the device you selected in step 7.

   You can change general properties by clicking the General tab, connection properties by clicking the Connection tab, and options properties by clicking the Options tab.

   See details

9. Click Dial.

   Organizer dials the phone number and displays the Dialing dialog box.

10. Depending on the result of your call, click Hangup to end the call, click Redial to try dialing the phone number again, or click OK to leave the dialog box.

    See details

{button ,AL(`H_DIALING_A_NUMBER_DETAILS',1)} See details

{button ,AL(`H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_QUICKLY_STEPS;H_SELECTING_A_DIALING_FROM_LOCATION_AND_CONFIGURING_YOUR_MODEM_STEPS',0)} See related topics

Details: Selecting a dialing from location and configuring your modem

Specifying the dialing from location for a Calls entry
You can select the location you're dialing from if you set up more than one location.

Clicking Dialing Properties
When you click Dialing Properties, if your modem is installed and configured, you can add locations and change existing locations. Organizer displays the Windows 95 Dialing Properties dialog box, and you can make your changes. You can specify a particular telephone area code and country code to use. You can also specify numbers that let you access an outside line (such as 9), or use a calling card number. You can set dialing properties for different locations, for example, from home, work, or a hotel so that you can easily switch from one location to another.

You can also make these changes in the Windows 95 Control Panel, under "Modems."

Note When you make changes to a location or choose a different location in the Dialing Properties dialog box, the changes you make affect all applications that use this information, not just Organizer.

Specifying the dial using device for a Calls entry
If you're dialing a telephone number from Organizer and you set up more than one telephone device for your system, you can choose another telephone device to dial a number. The default is whatever you specify when you choose File - User Setup - Telephone Dialing.

Configuring your dialing device
If you already configured your modem in the Windows 95 Control Panel, you can make changes to your modem setup. Click Configure; Organizer displays the Windows 95 Modem Properties dialog box, and you can make your changes. Changes you make to the configuration of a dialing device from Organizer are only in effect for the current Organizer session, and don't affect other applications. You can also make these changes in the Windows 95 Control Panel, under "Modems."

{button ,AL(`H_SELECTING_A_DIALING_FROM_LOCATION_AND_CONFIGURING_YOUR_MODEM_STEPS',1)} Go to procedure

Selecting a dialing from location and configuring your modem

You must install and set up a modem and phone in the Windows Control Panel before you can do the steps below.

1. Choose Phone - Dial.
2. Enter the appropriate information for contact, company, and phone number.
3. Click the "Dialing from" box and make your selection.

   See details
4. Click Dialing Properties and select the appropriate options for the location you're dialing from.

   See details
5. Click the "Dial using" box and make your selection.

   See details
6. Click Configure to change the properties of the device you selected in step 5.

   You can change general properties by clicking the General tab, connection properties by clicking the Connection tab, and options properties by clicking the Options tab.

{button ,AL(`H_SELECTING_A_DIALING_FROM_LOCATION_AND_CONFIGURING_YOUR_MODEM_DETAILS',1)} See details

{button ,AL(`;H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_QUICKLY_STEPS;H_DIALING_A_NUMBER_STEPS;H_INSERTING_A_CALL_STEPS',0)} See related topics

Selecting Dialing properties

Option	Results
I am dialing from	Lets you select the location you're dialing from. You can select from a list of locations that are currently set up. Click New to set up an additional location.
The area code is	Lets you specify the area code for the current location. If you're in a country other than the United States, enter your city code here, but don't include the leading 0. For example, if your city code is 071, just enter 71.
I am in	Lets you specify the country code for the current location.
To access an outside line, first dial	Lets you specify the number(s) required to access an outside line for local and long distance calls. Enter the number(s) to access an outside line for local calls in the "for local" box, and the number(s) to access an outside line for long distance calls in the "for long distance" box.
Dial using calling card	Displays or doesn't display (default) the calling card you want to use when you dial from this location. Click Change to select options for your calling card or to select a different calling card.
This location has call waiting	Disables (default) or doesn't disable call waiting for the current location. Call waiting should be turned off when you're dialing from your computer. Contact your telephone company for information on how to turn off call waiting.
To disable it, dial	Lets you specify the code to use to disable call waiting. Contact your telephone company for information on how to turn off call waiting.
The phone system at this location uses	Lets you specify which type of dialing to use. Specify "Pulse dialing" only if you use a rotary type of dialing.

Changing mouse pointer preferences

You can change the way your mouse pointer appears and behaves.

1. Choose File - User Setup - Organizer Preferences.

2. Under "Mouse pointer," select the appropriate option.
3. Click OK.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Changing sound preferences

You can associate sounds with events in Organizer.

1. Choose File - User Setup - Organizer Preferences.
2. Under Sound, deselect "Mute Organizer sounds."
3. Select a sound event.
4. Click the appropriate command button.
5. Click OK.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_MOUSE_POINTER_PREFERENCES_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Changing Organizer display preferences

1. Choose File - User Setup - Organizer Preferences.

2. Under "Display," select the appropriate options.
3. Click the "Weeks start on" box and select which day of the week your work week starts on.
4. Click OK.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_MOUSE_POINTER_PREFERENCES_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Changing the Organizer paths

Option	Contains	Default
Attachment directory	Files detached from meeting notices	Install directory and WORK\ ORGANIZE; C:\LOTUS\WORK\ ORGANIZE
Paper layouts	Organizer paper layouts and report files	Install directory and ORGANIZE\ LAYOUTS; C:\LOTUS\ORGANIZE\ LAYOUTS
Custom SmartIcons	Custom SmartIcons and customized (user defined) sets of SmartIcons	Install directory and ORGANIZE\ ICONS; C:\LOTUS\ORGANIZE\ ICONS

Changing alarm preferences

By default, Organizer displays alarms that you missed; the missed alarms appear when you re-open Organizer. You can select the tune to play for alarms.

1. Choose File - User Setup - Organizer Preferences.
2. Under "Display," select "Display missed alarms" to turn on or off the display of missed alarms.

   If this option is checked (default), missed alarms are displayed when you re-open Organizer.
3. Click the box under "Favorite alarm tune" and select a tune to play for alarms.
4. Click OK.

{button ,AL(`H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_MOUSE_POINTER_PREFERENCES_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Overview: Organizer preferences

Organizer preferences are options you select that affect how the Organizer environment appears and functions. You can change any of the defaults in Organizer for all of the following preferences:

- Environment options determine whether to display the clock and today's date; how your mouse pointer appears and acts; what your favorite alarm tune is; what sound you want associated with what action; and whether your week starts on Sunday or Monday.
- Folders options determine the paths and directories used to store similar Organizer information. For example, you can store attachments in one folder, paper layouts in another folder, and sets of SmartIcons in another.

{button ,AL(`H_CHANGING_THE_DISPLAY_OPTIONS_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS;H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_YOUR_FONT_SIZES_DEF;H_CHANGING_YOUR_SAVE_INTERVAL_DEF;H_CHANGING_YOUR_STARTUP_OPTIONS_DEF',0)} See related topics

Overview: Changing section preferences

Preferences are options you can select in Organizer that affect the way Organizer displays your information. You can change any of the default preferences in Organizer.

- Section preferences determine how your sections look and how your section information appears. For example, section preferences determine the view or sort order of entries in a section, and what information and symbols Organizer displays with each entry.
- Alarm preferences determine what tune plays when an alarm sounds, whether or not a message displays with the alarm, whether the alarm starts an application, and whether the Alarm dialog box displays when the alarm goes off.
- Meeting notices preferences determine the way Organizer processes meeting invitations sent to you.
- Scheduling options preferences determine the way Organizer displays attendees and their free time and how Organizer performs free time searches.

{button ,AL(`;H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS;H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;',0)} See related topics

Changing sound preferences

Command button	Result
Play	Plays the selected sound.
Stop	Stops playback of the selected sound.
Sounds	Opens the Sounds Properties dialog box where you can change the association of sounds with events.

Changing Organizer paths

Paths are used to specify the directories (folders) where you want to store similar kinds of Organizer information. For example, you can select one folder for your Organizer files, another for layouts, and another for icons.

1. Choose File - User Setup - Organizer Preferences.
2. Click the Folders tab.
3. Select the paths appropriate for you.

   If necessary, click Browse to select a different path.
4. Click OK.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_MOUSE_POINTER_PREFERENCES_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Changing mouse pointer preferences

Option	Result
Plain	Displays (default) the various Organizer mouse pointers in black and white.
Color	Displays the various Organizer mouse pointers in color.
Animated	Animates the display of some Organizer mouse pointers; for example, stopwatch shows a turning second hand when animated.

Changing your display preferences

Option	Result
Clock & today's date	Displays (default) the clock and date calendar in Toolbox.
Animated page turn	Displays (default) an animated turning page when you turn the page.
Display missed alarms	Displays (default) any alarms that are passed. For example, if you set an alarm for 2:00 but closed Organizer, the alarm you missed displays when you re-open Organizer.

Updating and checking the status of To Do tasks

You can update the status of tasks so that Organizer displays each task in the correct category in the To Do section. You update the status of tasks in your Notes mail file. You can then check the status of your tasks in Organizer.

To update the status of tasks manually

1. If necessary, open your mail file in Notes and switch to the To Do view.
2. Click Update Tasks.

To update the status of tasks automatically

1. Open your mail file in Notes and switch to the Agents view.

Note You must have access to run agents on your mail server. If you're not sure if you have access, see your Notes administrator.

2. Click the box to the left of Update Tasks.
3. If Notes asks you to specify a server on which the agent should run, specify your mail server and click OK.

Tip The default time that Notes runs the agent each day is 1:00 AM. To run the agent at a different time, double-click the Update Tasks agent, click Schedule, specify a different time, click OK, and save the agent.

Checking the status of a To Do task

You can check the status of your To Do task in Organizer. The description of your To Do task is assigned a color according to the following kinds of status: overdue, current, future, or completed. If no date or priority is associated with a To Do task, it's assigned the current status.

1. In Organizer, go to the To Do task.
2. Check the status of your To Do task by checking the color of the To Do task description.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS;',0)} See related topics

Closing an Organizer file

In Organizer 97 GS, you close your group-scheduling file (your Notes mail file) by exiting Organizer. To exit Organizer, choose File - Exit Organizer. Changes you made to your file were automatically saved as you were working on your file.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;',0)} See related topics

Creating a new Organizer file

You create new Organizer 97 GS files by creating a new Notes database in Notes. The database must use the appropriate template, MAIL45.NTF, for the new database to work properly with Organizer. For more information on creating new databases, see Notes Help.

{button ,AL(`;H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_CLOSING_A_FILE_STEPS',0)} See related topics

Details: Opening an Organizer file by database name

Specifying the server
Under "Server," you can select the Notes server where the file you want to open is located. Choose "Local" to specify a file located on your own computer.

Specifying the database you want to open
Under "Database," enter the name of the file you want to open. Be sure to include the path to the location of the file on the server (for example, \mail\EMurray.NSF).

If you choose "Local" under "Server," enter only the name of the file (for example EMurray.NSF). Organizer can only open files located in the subdirectory specified in Notes User Preferences under "Local database folder." The default is typically the Notes \DATA directory (for example, C:\NOTES\DATA).

To change or view Notes User Preferences, in Notes, choose File - Tools - User Preferences. See Notes Help for more information on User Preferences.

Opening a recently-used file
Organizer lists the five files you most recently used at the bottom of the File menu. To open one of these files, choose File and select a file from the bottom of the pull-down menu.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS',1)} Go to procedure

Opening an Organizer file by database name

Organizer lets you open files by the database name.

1. Choose File - Open.
2. Click the Database tab to open a file by database name.
3. Click the "Server" box and select the server where the database is located.

   See details
4. For "Database," enter the name of the database you want to open.

   See details
5. Click OK.
6. If the file you selected has a password, enter the password and click OK.

Organizer displays the user name of the open file in the title bar. This information comes from the "Mail File Owner" field in your mail file's Calendar Profile. To display the Calendar profile for your mail file, select your mail file icon in the Notes workspace and choose Action - Calendar Tools - Calendar Profile. For more information on Calendar Profiles, see Notes Help.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_CLOSING_A_FILE_STEPS;H_MOVING_ORGANIZER_INFORMATION_TO_A_NOTES_MAIL_FILE_FOR_GROUP_SCHEDULING_STEPS;H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_STEPS;',0)} See related topics

Details: Opening an Organizer file by user name

Keyboard shortcut
You can also press CTRL+O to open an Organizer file.

Selecting a file to open
You can either enter the user name or select the user name from the list.

If you're opening a file by user name and start typing a user name in the box, Organizer attempts to match the letters you type with names in the list and supply the rest of the name.

Opening a recently-used file
Organizer lists the five files you most recently used at the bottom of the File menu. To open one of these files, choose File and select a file from the bottom of the pull-down menu.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS',1)} Go to procedure

Opening an Organizer file by user name

Organizer lets you open files by the user name.

1. Choose File - Open.
2. Click the Names tab to open a file associated with the name you select.
   See details
3. (Optional) Click the "Address" box to change the Address Book.
4. Select a file to open.
   See details
5. Click OK.
6. If the file you selected has a password, enter the password and click OK.

Organizer displays the user name of the open file in the title bar. This information comes from the "Mail File Owner" field in your mail file's Calendar Profile. To display the Calendar profile for your mail file, select your mail file icon in the Notes workspace and choose Action - Calendar Tools - Calendar Profile. For more information on Calendar Profiles, see Notes Help.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_CLOSING_A_FILE_STEPS;H_MOVING_ORGANIZER_INFORMATION_TO_A_NOTES_MAIL_FILE_FOR_GROUP_SCHEDULING_STEPS;H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_STEPS;',0)} See related topics

Overview: Files

The new Organizer 97 GS extension for group scheduling is .NSF. To use Organizer 97 GS group scheduling, you work in your Notes mail file (for example, MAIL.NSF). You can only open Notes databases in Organizer 97 GS, and any Notes database you open must use the MAIL45.NTF template.

Note You can't open an Organizer 97 GS (.OR4) file, an Organizer 97 (.OR3) file, or an Organizer 2.x (.OR2) file directly in Organizer 97 GS with group scheduling. Choose File - Import to convert information in these files to your Notes mail file. For more information, see Moving Organizer information to a Notes mail file for group scheduling..

The first time you start Organizer, Organizer will ask you to open your Notes mail file. Each time you start Organizer after this, Organizer automatically opens your existing Notes mail file. As you create entries and do your Organizer work, your .NSF file is automatically updated with each change you make.

With Organizer files, you can also work offline using a replica of your Notes mail file. For example, you can create a local replica of your mail file on your notebook computer from your home server at the office. You can work on the local file on your notebook computer. When you return to the office, you can replicate changes between your local file and the replica on your home server. If your notebook computer and your home server each have a modem, you can also call your home server and replicate changes between your local replica and the replica on the server while you're on the road.

{button ,AL(`H_CLOSING_A_FILE_STEPS;;H_MOVING_ORGANIZER_INFORMATION_TO_A_NOTES_MAIL_FILE_FOR_GROUP_SCHEDULING_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS',0)} See related topics

Saving an Organizer file with a different name

You can save a version of your file with a different name by creating a copy of your database in Notes. To do this, in Notes, choose File - Database - New Copy. For more information see Notes Help.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_CLOSING_A_FILE_STEPS;',0)} See related topics

Compacting a file

Like all Notes databases, your Notes mail file contains usable documents and unused space. Deleting many documents or large attachments can cause considerable amounts of unused space, which takes up disk space unnecessarily. Compacting your Notes mail file periodically removes the unused space and ensures that it remains the smallest size possible.

You compact your Notes mail file in Notes. For more information on compacting your Notes mail file, see Notes Help.

{button ,AL(`H_ARCHIVING_INFORMATION_STEPS;',0)} See related topics

Compacting an Organizer 2.x file

It's recommended that you compact your Organizer 2.x (.OR2) file before you convert it to Organizer 97 GS (.OR4 or .NSF).

Note You cannot compact an open file.

1. Start Organizer 2.x.
2. Choose File - Compact.
3. From the "Directories" box, select the path Organizer must use to select the file you want to compact.

   If necessary, click the "Drives" box to select another drive.
4. Click the "List files of type" box to select the type of file you want to compact.
5. For "File name," enter the name of the file you want to compact.
6. Click Compact.

   Organizer tells you that it will create a backup file before compacting your file.
7. Click Yes to make a backup file.
8. Click OK when Organizer successfully compacts your file.

   The Lotus Organizer 2 Compact dialog box reappears.
9. (Optional) To compact additional files, follow steps 2 - 7.
10. Click Exit when you're finished compacting files.

    This will close the Lotus Organizer Compact dialog box.
11. Choose File - Exit Organizer to leave Organizer 2.x.

Compacting your Organizer 97 (.OR3) file

It's recommended that you compact your Organizer 97 (.OR3) file before you convert it to Organizer 97 GS (.OR4 or .NSF).

Note You cannot compact an open file.

1. Start Organizer 97.
2. Choose File - Compact.
3. Click the "Look in" box and select the path Organizer must use to select the file you want to compact.
4. Click the "Files of type" box and select the type of file you want to compact.
5. For "File name," enter the name of the file you want to compact.
6. Click Compact.

   Organizer tells you that it will create a backup file before compacting your file.
7. Click Yes to make a backup file.
8. Click OK when Organizer successfully compacts your file.

   The Lotus Organizer 97 File Compact dialog box reappears.
9. (Optional) To compact additional files, follow steps 2 - 7.
10. Click Exit when you're finished compacting files.

    This closes the Lotus Organizer 97 File Compact dialog box.
11. Click File - Exit Organizer to leave Organizer.

Overview: Migrating Organizer information to a Notes mail file for group scheduling

You can migrate information from your Organizer 2.x (.OR2), Organizer 97 (.OR3), or Organizer 97 GS (.OR4) files to your existing Notes mail file (for example, JDOE.NSF) so that you can use Organizer's group-scheduling feature. You use Organizer's File - Import command to convert your file.

Note If you're converting an Organizer 2.x (.OR2) file that you used for group scheduling, see your system administrator for important information before converting your file.

Note Before you can use group scheduling, you must have Notes workstation software installed on your computer and an existing Notes mail file (using the Mail template), and you must have the PIM with the group-scheduling version of Organizer 97 GS installed. For more information, see your system administrator.

When you convert a file, Organizer moves all information, except Address records, from your .ORX file to your Notes mail file. Your Address records are moved to your personal (local) Name and Address Book (NAMES.NSF), which is typically located in your Notes \DATA directory (for example C:\NOTES\DATA). You can't use .OR4, .OR3 or .OR2 files with Organizer 97 GS with group scheduling. Your .ORX file still exists in its original format and location.

Organizer keeps the file information in the .NSF file as it appears in the original version, with the following exceptions:

- Included sections from Organizer 2.x (.OR2), Organizer 97 (.OR3), or Organizer 97 GS (.OR4) files aren't automatically included in the mail file. You can only include sections from other Organizer 97 GS (.NSF) files in your group-scheduling file.
- The Address section will be exported to the local Notes Name and Address book (NAMES.NSF), and displayed as an included section in the Notes mail file.

  By default, multiple Address sections in your .OR2 , .OR3, or .OR4 file are combined in your NAMES.NSF file and displayed as a single Address section. However, if you want to keep multiple Address sections in Organizer, you can create additional local Name and Address books in Notes for each additional Organizer Address section. Before you import your .ORX file, include the new local Name and Address books in your Organizer. When you import your .ORX file, you can select the local Name and Address book that you want each Address section exported to. For example, if you have two Address sections, "Business" and "Personal," and you want to maintain separate Address sections after you import your .ORX file to your mail file, use Notes to create another local Name and Address book (you'll need to give it a name other than NAMES.NSF). Include the new Address section in Organizer, and import your .ORX file. You'll have the option of exporting your "Business" Address section to one local Name and Address Book, and your "Personal" Address section to the other.

  For more information on creating a local Name and Address book, see Notes Help; for more information on including sections, see Including sections from other Organizer files..

  Note If your local Name and Address Book (NAMES.NSF) in Notes already contains an entry similar to an Address record in your .ORX file, you could get two entries for one name entry in your Name and Address Book. Before you remove a duplicate entry, check both the Person documents in Notes and the Address records in Organizer to make sure the entry you keep contains all the information from both places.

{button ,AL(`;H_IMPORTING_AN_ENTRY_STEPS;H_MOVING_ORGANIZER_INFORMATION_TO_A_NOTES_MAIL_FILE_FOR_GROUP_SCHEDULING_STEPS',0)} See related topics

Migrating Organizer information to a Notes mail file for group scheduling

You can migrate information from your Organizer 2.x (.OR2), Organizer 97 (.OR3), or Organizer 97 GS (.OR4) files to your existing Notes mail file (for example, JDOE.NSF). After your Organizer information is migrated to your mail file, you can use Organizer's group scheduling feature with Organizer 97 GS group scheduling and Notes.

During this process, your Organizer Address sections will be exported to a local Notes Name and Address book.

Note If you're converting an Organizer 2.x (.OR2) file that you used for group scheduling, see your system administrator for important information before converting your file.

1. Compact your Organizer 2.x , Organizer 97, or Organizer 97 GS file.

   See Compacting your Organizer 2.x file

   See Compacting your Organizer 97 (.OR3) file

   See Compacting an Organizer 97 (.OR4) file
2. (Optional) If you have more than one Organizer Address section, and you want to maintain those separate Address sections, use Notes to create as many local Name and Address books as you need. Then use Organizer to include the local Name and Address book(s) in your file.
3. Choose File - Import.
4. Click the "Look in" box and select the path Organizer must use to convert the information you want.
5. Click the "Files of type" box and select "Organizer *.ORx."
6. For "File name," enter the name of the Organizer file you want to convert to your Notes mail file.

   You can also select the file from the list.
7. Click Import.
8. If the file you selected has a password assigned to it, enter the password and click OK.
9. (Optional) For each address section, select the local Notes Name and Address book into which you want your Organizer Address information to appear. For "Put "Address" address section in," select the Notes Name and Address book you want.
10. Click Import.

Tip After you migrate your Organizer information into your mail file, the size of your mail file increases to accommodate the additional Organizer information. You can archive information you don't need on a day-to-day basis to streamline your Notes mail file. Archiving a database by regularly moving data out of the working copy and into an archive database can significantly improve database performance as well as conserve disk space.

You archive information in your Notes mail file in Notes. For more information on archiving your Notes mail file, see Notes Help or your system administrator.

{button ,AL(`H_IMPORTING_AN_ENTRY_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS',0)} See related topics

Overview: Converting an Organizer 2.11 Address section to Organizer 97 GS

If your system administrator converted your Organizer 2.11 (.OR2) file to Organizer 97 GS so that you can use group scheduling, you have to perform additional steps to make addresses from your old Organizer (.OR2) file available in your Notes Personal Name and Address Book. You should receive an e-mail from your system administrator, which contains an attached file, called OR2ADDR.NSF, and the steps for moving your old Address section to your Name and Address Book. OR2ADDR.NSF contains the addresses from your old Organizer (.OR2) file. Your Address section was converted to a personal Name & Address Book.

Note If you didn't receive an email with the attached file, OR2ADDR.NSF, contact your system administrator.

To use OR2ADDR.NSF in Organizer and Notes

1. Detach the file to your NOTES\DATA directory (or to the directory that contains your Personal Name and Address Book).
2. Do one of the following activities:

- Open Organizer and include the file as an additional Address section.
- Open the file in Notes, and copy and paste all entries to an existing personal Name & Address Book.

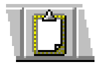
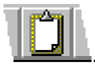
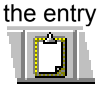
If you include the file in Organizer as a new Address section, start Notes and choose File- Tools - User Preferences to add this file to your list of Personal Name and Address Books. For more information on including sections, see Including sections from other Organizer files. For more information on changing Notes user preferences, see Notes Help.

If you copy the Organizer entries to an existing personal Name & Address Book, you could end up with two entries for one name. Before removing a duplicate entry, check both the Person documents in Notes and the Address records in Organizer to make sure the entry you keep contains all the information from both places.

Details: Copying a single entry

Keyboard shortcuts
You can also press CTRL+C to copy and CTRL+V to paste an entry where you want it copied.

Copying a single entry in other ways
To copy an entry, press and hold CTRL as you drag and drop the entry to its new location.

You can also copy an entry using  in Toolbox. To do so, drag and drop the entry to . Your newly copied entry writes over anything that is currently on Clipboard. Go to where you want to copy the entry and drag and drop your entry  to copy it there.

{button ,AL(`H_COPYING_A_SINGLE_ENTRY_STEPS',1)} Go to procedure

Copying a single entry

1. Select the information you want to copy.
2. Choose Edit - Copy.
3. Click where you want the information copied to: another date and time, another page, another section, and so on.
4. Choose Edit - Paste.

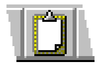
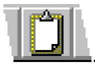
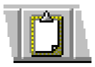
{button ,AL(`H_COPYING_A_SINGLE_ENTRY_DETAILS',1)} See details

{button ,AL(`H_COPYING_MULTIPLE_ENTRIES_STEPS;H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_SELECTING_A_SINGLE_ENTRY_STEPS;H_SELECTING_MULTIPLE_ENTRIES_STEPS;H_MOVING_A_SINGLE_ENTRY_STEPS;H_MOVING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Details: Copying multiple entries

Keyboard shortcuts
You can also press CTRL+C to copy and CTRL+V to paste selected entries where you want them copied.

Copying multiple entries in other ways
To copy selected entries to another place, hold down CTRL as you drag and drop the multiple entries to their new location.

You can also copy multiple entries using  in Toolbox. To do so, drag and drop the entries to . Your newly copied entries write over anything that is currently on Clipboard. Go to where you want to copy the entries and drag and drop  to copy them there.

{button ,AL(`H_COPYING_MULTIPLE_ENTRIES_STEPS',1)} Go to procedure

Copying multiple entries

You can copy multiple entries that are and aren't in sequence.

1. Go to the first of the multiple entries you want to copy.
2. Select the entry.
   - If the multiple entries you're selecting are in sequence: hold down SHIFT, move to the last entry, and click the entry.
   - If the multiple entries you're selecting aren't in sequence: hold down CTRL, move to each entry, and click the entry.
3. Choose Edit - Copy.
4. Click where you want the information copied to: another area, another page, another section, and so on.
5. Choose Edit - Paste.

{button ,AL(`H_COPYING_MULTIPLE_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_SELECTING_A_SINGLE_ENTRY_STEPS;H_SELECTING_MULTIPLE_ENTRIES_STEPS;H_MOVING_A_SINGLE_ENTRY_STEPS;H_MOVING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Details: Moving a single entry

Keyboard shortcuts
You can also press CTRL+X to cut and CTRL+V to paste an entry where you want it moved.

Moving a single entry in other ways
To move an entry, drag and drop the entry to its new location. For example, if you're moving an appointment to a different date in Calendar, drag and drop the entry to the new date; if you're moving a To Do task to the Calls section, drag and drop the task to the Calls section tab.

{button ,AL(`H_MOVING_A_SINGLE_ENTRY_STEPS',1)} Go to procedure

Moving a single entry

1. Select the information you want to move.
2. Choose Edit - Cut.
3. Click where you want the information moved to: another date and time, another page, another section, and so on.
4. Choose Edit - Paste.

{button ,AL(`H_MOVING_A_SINGLE_ENTRY_DETAILS',1)} See details

{button ,AL(`;H_MOVING_MULTIPLE_ENTRIES_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_SELECTING_A_SINGLE_ENTRY_STEPS;H_SELECTING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Details: Moving multiple entries

Keyboard shortcuts
You can also press CTRL+X to cut and CTRL+V to paste selected entries where you want them moved.

Copying multiple entries in other ways
To move selected entries to another place, drag and drop the multiple entries to their new location. For example, if you're moving multiple appointments to a different date in Calendar, drag and drop the entries to the new date; if you're moving multiple To Do tasks to the Calls section, drag and drop the tasks to the Calls section tab.

{button ,AL(`H_MOVING_MULTIPLE_ENTRIES_STEPS',1)} Go to procedure

Moving multiple entries

You can move multiple entries that appear in sequence as well as multiple entries that don't appear in sequence.

1. Go to the first of the multiple entries you want to move.
2. Select the entry.
   - If the multiple entries you're selecting are in sequence: hold down SHIFT, move to the last entry, and click the entry.
   - If the multiple entries you're selecting are not in sequence: hold down CTRL, move to each entry, and click the entry.
3. Choose Edit - Cut.
4. Click where you want the information moved to: another area, another page, another section, and so on.
5. Choose Edit - Paste.

{button ,AL(`H_MOVING_MULTIPLE_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_MOVING_A_SINGLE_ENTRY_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_SELECTING_A_SINGLE_ENTRY_STEPS;H_SELECTING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Details: Copying Organizer field information to use in other applications

Selecting Organizer field information to copy
To select information to copy, go to the information and click it.

For example, to copy information from an Address record, click the Address record to select it. To copy an appointment, a task, an event, a page, a call, or an anniversary, click the entry you want to copy. To copy information from a Notepad page, click the Notepad page you want to copy.

Using the "Fields" box
The fields listed in the "Fields" box reflect the type of Organizer information you selected.

For example, if you selected an Address record, you'll get a listing of Address record fields whose specific information you can copy; if you selected a To Do task, you'll get a listing of To Do fields, and so on.

Selecting "vCalendar as Text Stream" or "vCard as Text Stream" from the "Fields" box
If you're copying an appointment or task to another application that supports vCalendar format, you can select "vCalendar as Text Stream." Your information will be copied to Clipboard in a format easily imported to another vCalendar-enabled application by using its Paste command.

If you're copying an Address record to another application that supports vCard format, you can select "vCard as Text Stream." Your information will be copied to Clipboard in a format easily imported to another vCard-enabled application by using its Paste command.

Switching between Organizer and other Windows applications
To switch between Organizer and any open Windows application, press ALT+TAB.

Copying appointments, tasks, or Address records to other applications in other ways
You can share information in an appointment, task, or Address record directly with another application by clicking the entry you want and dragging and dropping from Organizer to the other application.

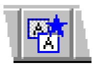
{button ,AL(`H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS', 1)} Go to procedure

Copying Organizer field information to use in other applications

You can use Copy - Special to copy specific Organizer field information from any section of Organizer. You can then paste that field information in other applications.

1. Go to the Organizer section whose field information you want to copy.
2. Select the information you want to copy.

   See details
3. Choose Edit - Copy Special.



4. Click the "Fields" box and select the field information you want to copy.

   See details
5. Click OK.
6. Switch to the application where you want to paste the copied field information.

   See details
7. Choose Edit - Paste.

{button ,AL(`H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_DETAILS',1)} See details

{button ,AL(`H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;H_COPYING_TEXT_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS;H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_STEPS;H_PASTING_INFORMATION_FROM_OTHER_APPLICATIONS_ON_A_NOTEPAD_PAGE_STEPS;H_OVERVIEW_VCALENDAR_AND_VCARD_OVER',0)} See related topics

Details: Copying text

Keyboard shortcuts
You can also press CTRL+C to copy and CTRL+V to paste text where you want it copied.

Selecting text in an entry
To select text in an entry, hold down the left mouse button while you drag across the text to highlight it.

{button ,AL(`H_COPYING_TEXT_STEPS',1)} Go to procedure

Copying text

You can copy text in any Organizer entry. For example, you can copy some of the text on a Notepad page rather than the entire page. You copy and paste in conjunction. When you copy information, you must paste it to see it.

1. Select the entry containing the text you want to copy.

   When you move the pointer over the selected entry, it changes to the , I-beam.
2. Click where you want to begin copying the text.

   The pointer changes to a , called a vertical cursor.
3. Select the text you want to copy.

   See details
4. Choose Edit - Copy.

5. Go to the page where you want your copied text to appear.
6. Click the page to select it.

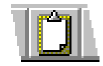
   The pointer changes to the , called an I-beam.
7. Click where you want to begin pasting the text.

   The pointer changes to a , called a vertical cursor.
8. Choose Edit - Paste.

{button ,AL(`H_COPYING_TEXT_DETAILS',1)} See details

{button ,AL(`H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS;H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_STEPS;H_PASTING_INFORMATION_FROM_OTHER_APPLICATIONS_ON_A_NOTEPAD_PAGE_STEPS',0)} See related topics

Deleting the contents of Clipboard

You can delete Clipboard contents at any time. Deleting Clipboard contents means that any information you copied to Clipboard will be cleared from Clipboard. To delete the contents of Clipboard, drag and drop  to in Toolbox.

Caution You cannot retrieve, nor use Edit - Undo to retrieve, deleted Clipboard contents.

{button ,AL(`H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_STEPS;H_PASTING_INFORMATION_FROM_OTHER_APPLICATIONS_ON_A_NOTEPAD_PAGE_STEPS',0)} See related topics

Overview: Clipboard

You can use Clipboard to quickly copy Organizer information containing text, links, a metafile, or a bitmap. Additionally, you can copy text or other information to Organizer from other Windows applications. For example, you can include a spreadsheet graph on a Notepad page or information from your word processing application.

You can also use the Copy - Special command to copy specific field information from within any section of Organizer, and then paste that field information in other applications. Additionally, Organizer supports vCalendar and vCard formats for copying and pasting appointment, task, and address information.

Note You copy and paste in conjunction. When you copy information, you must paste it to see it.

{button ,AL(`H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS;H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_OVERVIEW_VCALENDAR_AND_VCARD_OVER;H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_STEPS;H_PASTING_INFORMATION_FROM_OTHER_APPLICATIONS_ON_A_NOTEPAD_PAGE_STEPS',0)} See related topics

Overview: vCalendar and vCard

Organizer supports vCalendar and vCard formats. These formats are protocols that let you easily share your appointments, tasks, and Address records with other applications that support vCalendar and vCard formats. With vCalendar, you can share information in appointments and tasks. With vCard, you can share information in your Address section in the form of an electronic business card.

You share information between Organizer and other applications using the Copy - Special command, or by dragging and dropping an appointment, task, or Address record from Organizer to another application that supports vCalendar or vCard format.

You can also import appointment, task, and address information from other applications into Organizer. If the application you're copying from supports vCalendar or vCard format, you can drag and drop information from the other application to Organizer, and Organizer will automatically create the entry in your Calendar, To Do, or Address section. You can also use Organizer's paste command to paste information formatted for vCalendar or vCard into Organizer.

{button ,AL(`H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_STEPS;H_OVERVIEW_CLIPBOARD_OVER',0)} See related topics

Paste Special options

Option	Result
Paste	Pastes (default) the information from the original (source) application in the format you select, for example, "Formatted Text (RTF)," "Unformatted Text," "Enhanced metafile picture," and so on.
Paste link to source	Pastes a link to the information you selected in the original (source) application, for example, a link to a Word Pro document object, a link to a 1-2-3 worksheet object, and so on.

Details: Pasting appointment, task, and address information from other applications

Pasting appointments, tasks, or address information from other applications in other ways
You can paste appointment, task, or address information directly from another application that supports the vCalendar or vCard format by dragging and dropping the information you want from the other application to the section in Organizer where you want the information to appear. For example, if you have information for a task in the other application, drag and drop the task information from the other application to the To Do section in your Organizer.

{button ,AL(`H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_STEPS',1)} Go to procedure

Pasting appointment, task, and address information from other applications

You can paste appointment, task, or Address record information from other applications that support the vCalendar or vCard formats.

1. In the other application, copy the information you want to appear in Organizer using the appropriate method for that application.

   See details
2. Go to the Organizer section where you want the information copied.
3. Choose Edit - Paste.

4. (Optional) Make any changes you want.
5. Click OK.

{button ,AL(`H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_DETAILS',1)} See details

{button ,AL(`H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_OVERVIEW_CLIPBOARD_OVER;H_OVERVIEW_VCALENDAR_AND_VCARD_OVER;H_COPYING_TEXT_STEPS;H_PASTING_INFORMATION_FROM_OTHER_APPLICATIONS_ON_A_NOTEPAD_PAGE_STEPS;H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;',0)} See related topics

Pasting information from other applications on a Notepad page

You can copy text or other information to a Notepad page from other Windows applications. For example, you can include a spreadsheet graph on a Notepad page or information from your word processing application.

1. From another Windows application, select and copy to Clipboard the information you want to appear in Notepad.
2. Go to the Notepad section.
3. Click the Notepad page once to select it.
4. Click the Notepad page again to place the cursor in the page.
5. Choose Edit - Paste Special.

   Note "Source" identifies where the information on Clipboard comes from.
6. Select an option.
7. Under "As," select the appropriate format for the type of information you copied from your Windows application to Clipboard.

   For example, if you are displaying a graph whose size is fixed, select "Bitmap." If you are displaying text, select "Formatted Text (RTF)" or "Unformatted Text," and so on.
8. Click OK.

{button ,AL(`H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS;H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_STEPS;H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS',0)} See related topics

Details: Pasting text from other applications in Organizer

Keyboard shortcuts
You can also press CTRL+V to paste text where you want it copied.

{button ,AL(`H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS',1)} Go to procedure

Pasting text from other applications in Organizer

You can copy text or other information to Organizer from other Windows applications. For example, you can include information from your word processing application in the description of an appointment or task.

1. From another Windows application, select and copy to Clipboard the information you want to appear in Organizer.
2. Go to the section you want to copy the information to, for example, your To Do section.
3. Double-click the entry where you want the text to appear, for example, double-click a task.
4. Click the "Description" box where you want the text to appear.
5. Choose Edit - Paste.
6. Click OK.

{button ,AL(`H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_DETAILS',1)} See details

{button ,AL(`H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS;;H_PASTING_APPOINTMENTS_TASKS_AND_ADDRESS_INFORMATION_FROM_OTHER_APPLICATIONS_STEPS;H_PASTING_INFORMATION_FROM_OTHER_APPLICATIONS_ON_A_NOTEPAD_PAGE_STEPS',0)} See related topics

Details: Customizing layout styles

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Customizing layout styles in other ways
You can choose File - Print, select the section and layout, click Layouts, click Styles, and then select the elements you want to customize.

Customizing layout elements
Just as the list of available layouts is specific to the section you selected, the list of layout elements is specific to the layout you selected. For example, if you select "Calendar" as the section and "Calendar List" as the layout, "Calendar room meeting text" is available; if you select "Address" as the section and "Address Card" as the layout, "Card separators" is available.

Adding codes to text elements
For text elements, you can select a code that formats and adds information in text elements. For example, there are codes that format dates and times; align text; add page numbers; and add the file name, section name, and/or the report heading.

To include a code in a text element, move the mouse pointer to where you want the code in the "Text" box and click. This positions the , called the insertion pointer. Then, click the "Codes" box and select a code. Organizer adds the code at the location of the insertion pointer. If you know the command for a code, you can also type the command in the "Text" box where you want it.

The following table lists the code names and commands (in parentheses), and the action each code performs.

Code	Action
Day as 1,2,3 (&d)	Displays the current day as a single digit, where appropriate.
Day as 01,02,03 (&dd)	Displays the current day as two digits.
Month as 1,2,3 (&M)	Displays the current month as a single digit, where appropriate.
Month as 01,02,03 (&MM)	Displays the current month as two digits.
Month as Jan, Feb (&MMM)	Displays the current month as a three-letter abbreviation.
Month as January, February (&MMMM)	Displays the full name of the current month.
Year as 96, 97 (&yy)	Displays the current year as a two-digit number.
Year as 1996,1997 (&yyyy)	Displays all digits of the current year.
First shown data (&e)	Displays the first item printed (depending on the layout, either a heading or data).
Last shown data (&q)	Displays the last item printed (depending on the layout, either a heading or data).
Hour as 1,2,3 (&h)	Displays the current hour as a single digit, where appropriate.
Hour as 01,02,03 (&hh)	Displays the current hour as two digits.
Minutes as 1,2,3 (&m)	Displays the current minute as a single digit, where appropriate.
Minutes as 01,02,03 (&mm)	Displays the current minute as two digits.
AM or PM suffix (&a)	Displays an AM or PM suffix based on the current time.
Align left (&l)	Left aligns all text that follows.
Align center (&c)	Centers all text that follows.
Align right (&r)	Right aligns all text that follows.
Page number (&p)	Displays page numbers.
File name (&f)	Displays the name of the current file.
Registered user name (&t)	Displays the name entered at installation of the current copy of Organizer.
Organizer release number (&v)	Displays the Organizer release number.
Section name (&s)	Displays the section name.

Layout name (&k)	Displays the name of the layout you're using.
Paper name (&z)	Displays the name of the paper type you're using.
Report heading (&H)	Displays the report heading of the current layout (for example, "Quarterly Planner").
Page date range long (&D)	Displays the date range for the current printing in words (for example, "February 9 - 13, 1997"), or when you're using one of the Daily layouts, the day name and date (for example, "Monday, February 10, 1997").
Page date range short (&J)	Displays the full date range in numeric format for the current printing (for example, "2/3/97 - 2/7/97").
Time (&T)	Displays the time for the current printing in numeric format (for example, "12:33 PM").
Today's date (&E)	Displays the date for the current printing in numeric format (for example,"10/8/96").

If OK is dimmed

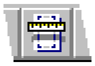
If, after you've made your selections in the Layout dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_CUSTOMIZING_LAYOUT_STYLES_STEPS',1)} Go to procedure

Customizing layout styles

You can determine what elements you use and how they appear in a layout, such as the header, footer, title, grid lines, borders, and so on. Organizer uses default settings for these elements, but you can change them. For example, you can change the font and color of a title, add a patterned background to column titles, or include a code that prints the current date in the footer.

1. Choose Edit - Layouts.



2. Click the "Section" box and select the section for which you want to customize the layout.
3. Click the "Layout" box and select the layout you want to customize.
4. Click Styles.
5. Click the "Element" box and select the layout element you want to customize.

   See details
6. If necessary, under "Text," enter changes to a text element.

   Text elements include titles, headers, and footers.
7. If necessary, click the "Codes" box and select a code for the text element.

   See details
8. Click the "Background" box and select a background color for the element you selected.
9. Click the "Pattern" box and select a hatch pattern for the element you selected.
10. (Optional) Repeat steps 5 - 9 for any other elements of the layout you want to customize.
11. Click OK to confirm your selections.
12. Click OK.

The layout changes will be in effect the next time you print using the layout.

{button ,AL(`H_CUSTOMIZING_LAYOUT_STYLES_DETAILS',1)} See details

{button ,AL(`H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS;H_SELECTING_FONTS_STEPS',0)} See related topics

Details: Customizing paper sizes, margins, and columns and rows sizes

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Customizing the paper type in other ways
You can choose File - Print, select the paper type you want to customize, click Layouts, and then click Paper to change the paper type settings.

Setting the scale elements
Organizer scales all fonts and bitmaps on the printed page by the percentage you enter. For example, if you type 80% for the scaling, all 10-point fonts appear in 8 point.

You can use scaling to help fit information on a single sheet of paper without changing the layout.

Specifying the layout for columns and rows
You can specify the number of rows and columns for a paper type. Organizer automatically adjusts the column width and row height based on the number of rows and columns you enter and the margin settings. You can, however, customize the width and height. For example, entering a smaller measurement for the column width decreases the column size and increases the amount of space between columns.

You can also change the column width and row height by directly manipulating the illustration of the paper type (on the left side of the dialog box). Drag an edge of the gray print area and the column or row line left, right, up, or down to change the width and height. The pointer changes to as you drag the columns and rows, and the values in the "Width" and "Height" fields change. If the paper type you're changing has many rows and columns, and you want a closer view of a row or column, click the row or column in the illustration and Organizer will zoom in on the area you clicked. Click the area again to go back to the original size.

Setting margins
The margins determine the print area. The print area is where Organizer prints information, and the margins are the amount of space around the outside of the print area.

You can enter specific values for the margins, or you can directly manipulate the graphical representation of the paper type. Drag the margin guides, which appear as red lines, to change the margins. The pointer changes to as you drag the margins, and the values in the margin fields change. The print area appears in gray.

Setting internal margins
Internal margins create additional space between the paper's margins and the actual print area. You might want to set internal margins to avoid printing over prepunched holes or preprinted information. The values for internal margins are typically small values; for example, an internal margin of 0.15 inches would create a small gap between the edge of a label and its printed text.

You can also set internal margins by directly manipulating the graphical representation of the paper type. Click and drag an edge of the gray print area to change the internal margins. The pointer changes to as you drag, and the values in the internal margins fields change.

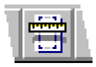
{button ,AL(`H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',1)} Go to procedure

Customizing paper sizes, margins, and columns and rows sizes

Organizer comes with a number of predefined paper types that, in most cases, you won't need to customize. You can customize aspects of a paper type; for example, the margin size or paper size. Changing paper type settings is optional; if you don't change the settings, Organizer uses the default settings.

Caution If you make changes to a default paper type and save it without giving it another name different from the name it was called, you will lose the original default settings for that paper type.

1. Choose Edit - Layouts.



2. Click the "Paper" box and select the paper type you want to customize.
3. Click Paper.
4. (Optional) Under "Name," enter a new name for the paper type.
5. For "Scale elements by," enter the scaling percentage: 50 - 200.

   Click + (plus) to increase or - (minus) to decrease the scaling percentage. You can also highlight the number in the box and type another number.

   See details
6. Under "Page," specify any changes to the page dimensions, and select "Centimeters" or "Inches" to specify the unit of measurement for those dimensions.
7. Under "Layout," specify the options for the number and size of columns and rows, as well as the column height and row width.

   See details
8. Under "Margins," specify the appropriate margins.

   See details
9. Under "Internal margins," specify any internal margins you want to create between the paper's margins and the actual print area.

   See details
10. Click Add to add or Remove to delete the new paper definition to the list of available paper types.

    Note The Add button is dimmed if you didn't enter a new name in step 4.

    See details
11. Click OK to confirm your selection.
12. Click OK.

Organizer saves the paper type as a new .PLT file in your \ORGANIZE\LAYOUTS directory.

{button ,AL(`H_CUSTOMIZING_THE_PAPER_SETTINGS_DETAILS',1)} See details

{button ,AL(`H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS;H_SELECTING_FONTS_STEPS',0)} See related topics

Details: Customizing the size of a printed image

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Customizing the size of the printed image in other ways
You can choose File - Print, select the paper type to customize, click Layouts, and then click Paper to customize the size of the printed image.

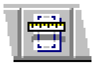
Setting the scale elements
Organizer scales all fonts and bitmaps in the printout by the amount you enter. For example, if you type 80% for the scaling factor, all 10-point fonts print in 8 point. You can use a scaling factor to help fit information on a single sheet of paper without changing the layout options.

{button ,AL(`H_CUSTOMIZING_THE_SIZE_OF_YOUR_PRINTED_IMAGE_STEPS',1)} Go to procedure

Customizing the size of a printed image

You can customize the size of a printed Organizer image by changing the scaling percentage of the print image. You can increase the size to create a larger print image or decrease the size for a smaller print image. To do this you change the scaling percentage for the paper type you're using.

1. Choose Edit - Layouts.



2. Click the" Paper" box and select the paper type you want to customize.
3. Click Paper.
4. For "Scale elements by," enter the scaling percentage you want: 50 - 200.

   Click + (plus) to increase or - (minus) to decrease the scaling percentage. You can also highlight the number in the box and type another number.

   See details
5. Click OK to confirm your selection.
6. Click OK.

{button ,AL(`H_CUSTOMIZING_THE_SIZE_OF_YOUR_PRINTED_IMAGE_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ADDRESS_RECORDS_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SELECTING_DIFFERENT_LAYOUTS_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Overview: Customizing print layouts, paper types, and layout elements

You can customize what you want to see printed (by selecting a print layout) and select the paper size (by selecting a paper type) to which you'll print your information. You can also customize specific layout elements, such as the header, footer, page numbers, column headings, and grid lines. Organizer uses default settings for all layout settings, but you can change them as needed.

In most cases you won't need to customize the predefined paper types that come with Organizer. But for those exceptions when you do, you can customize various aspects of a paper type, for example, the margin size, paper size, number of columns, and column widths.

{button ,AL(`;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_SETTING_LAYOUT_PREFERENCES_DEF',0)} See related topics

Details: Selecting fonts for printing

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Selecting fonts in other ways
You can choose File - Print, select the section and layout to customize, click Layouts, and then click Styles to select text elements and change the fonts for text elements.

{button ,AL(`H_SELECTING_FONTS_STEPS',1)} Go to procedure

Selecting fonts for printing

You can select a font for any text element of a layout; for example, a header or footer.

1. Choose Edit - Layouts.
2. Click the "Section" box and select the section for which you want to customize the layout.
3. Click the "Layouts" box and select the layout you want to customize.
4. Click Styles.
5. Click the "Element" box and select the text element, such as a header or footer, for which you want to change the font.
6. Click Font.
7. Under "Font," "Font Style," and "Size," select the appropriate options you want for the font.
8. (Optional) Under Effects, select Strikethrough to include a line through the text or select "Underline" to underline the text.
9. (Optional) Under Effects, click the "Color" box and select a different color for the text. (The default color is black.)
10. Click OK to confirm your selections.
11. Click OK to close the configuration box.
12. Click OK.

{button ,AL(`H_SELECTING_FONTS_DETAILS',1)} See details

{button ,AL(`H_SELECTING_DIFFERENT_LAYOUTS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS;',0)} See related topics

Details: Customizing layouts

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Customizing a layout in other ways
You can choose File - Print, select the section and layout, click Layouts, and then customize the layout.

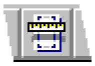
If OK is dimmed
If, after you've made your selections in the Layout dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_SELECTING_INDIVIDUAL_LAYOUT_OPTIONS_STEPS',1)} Go to procedure

Customizing layouts

You customize a layout to change its orientation on the printed page and to specify what or how much information you want to print.

1. Choose Edit - Layouts.



2. Click the "Section" box and select the section for which you want to customize a layout.
3. Click the "Layout" box and select the layout you want to customize.
4. Select the printing orientation: "Portrait" or "Landscape."
5. Under "Preferences," select the options you want.
6. Click OK to save your changes.

The layout changes will be in effect the next time you print using the layout.

{button ,AL(`H_SELECTING_INDIVIDUAL_LAYOUT_OPTIONS_DETAILS',1)} See details

{button ,AL(`H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS;H_SELECTING_FONTS_STEPS',0)} See related topics

Setting layout preferences

Option	Result
Print first line only	Prints only the first line of the description for each entry. (The default is to print the full description.)
Print icons	Prints (default) or doesn't print any icons that appear with entries — for example, the alarm icon or repeating entry icon.
Print month calendars	Prints (default) or doesn't print the monthly calendars for layouts that include monthly calendars.
Address	Specifies whether to print the Home address record, Business address record, Both home and business address records, or the Current address record when you're printing Address records.
	If you select "Current,"Organizer prints the Address record you selected before choosing File - Print.

Setting the print orientation

Option	Result
Portrait	Prints information across the width of the page.
Landscape	Prints information across the length of the page.

Details: Setting up headers, footers, and titles

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Adding codes to text elements
For text elements, you can select a code that formats and adds information in text elements. For example, there are codes that format dates and times; align text; add page numbers; and add the file name, section name, and/or the report heading.

To include a code in a text element, move the mouse pointer to where you want the code in the "Text" box and click. This positions the , called the insertion pointer. Then, click the "Codes" box and select a code. Organizer adds the code at the location of the insertion pointer. If you know the command for a code, you can also type the command in the "Text" box where you want it.

The following table lists the code names and commands (in parentheses), and the action each code performs:

Code	Action
Day as 1,2,3 (&d)	Displays the current day as a single digit, where appropriate.
Day as 01,02,03 (&dd)	Displays the current day as two digits.
Month as 1,2,3 (&M)	Displays the current month as a single digit, where appropriate.
Month as 01,02,03 (&MM)	Displays the current month as two digits.
Month as Jan, Feb (&MMM)	Displays the current month as a three-letter abbreviation.
Month as January, February (&MMMM)	Displays the full name of the current month.
Year as 96, 97 (&yy)	Displays the current year as a two-digit number.
Year as 1996,1997 (&yyyy)	Displays all digits of the current year.
First shown data (&e)	Displays the first item printed (depending on the layout, either a heading or data).
Last shown data (&q)	Displays the last item printed (depending on the layout, either a heading or data).
Hour as 1,2,3 (&h)	Displays the current hour as a single digit, where appropriate.
Hour as 01,02,03 (&hh)	Displays the current hour as two digits.
Minutes as 1,2,3 (&m)	Displays the current minute as a single digit, where appropriate.
Minutes as 01,02,03 (&mm)	Displays the current minute as two digits.
AM or PM suffix (&a)	Displays an AM or PM suffix based on the current time.
Align left (&l)	Left aligns all text that follows.
Align center (&c)	Centers all text that follows.
Align right (&r)	Right aligns all text that follows.
Page number (&p)	Displays page numbers.
File name (&f)	Displays the name of the current file.
Registered user name (&t)	Displays the name entered at installation of the current copy of Organizer.
Organizer release number (&v)	Displays the Organizer release number.
Section name (&s)	Displays the section name.
Layout name (&k)	Displays the name of the layout you're using.
Paper name (&z)	Displays the name of the paper type you're using.
Report heading (&H)	Displays the report heading of the current layout (for example, Quarterly Planner).
Page date range long (&D)	Displays the date range for the current printing in words (for example, "February 9 - February 13, 1997"), or for a range of one day, displays the day name and date (for example, "Monday, February 10, 1997").

Page date range short (&j)	Displays the full date range in numeric format for the current printing (for example, "2/3/97 - 2/7/97").
Page date range short (&X)	Displays the date range for the current printing in numeric format (for example, "2/3 - 2/7/97").
Time (&T)	Displays the time for the current printing in numeric format (for example, "12:33 PM").
Today's date (&E)	Displays the date for the current printing in numeric format (for example, "2/7/97").

{button ,AL(`H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS',1)} Go to procedure
{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',0)} See related topics

Setting up headers, footers, and titles

You can customize text elements of a layout, such as the headers, footers, and titles; you can enter text as well as include Organizer codes. Organizer codes format and/or add information in text elements. For example, there are codes that format dates and times; align text; add page numbers; and add the file name, section name, and/or a report heading.

1. Choose Edit - Layout.
2. Click the "Section" box and select the section for which you want to customize the layout.
3. Click the "Layout" box and select the layout you want to customize.
4. Click Styles.
5. Click the "Element" box and select the text element you want to customize.
6. For "Text," enter the text you want printed.
7. If necessary, click the "Codes" box and select a code for the text element.

   See details
8. Click the "Background" box and select a background color for the text element you selected.
9. Click the "Pattern" box and select a hatch pattern for the text element you selected.
10. Click OK to confirm your selection.
11. Click OK.

{button ,AL(`H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_DETAILS',1)} See details

{button ,AL(`H_SELECTING_DIFFERENT_LAYOUTS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_SELECTING_FONTS_STEPS',0)} See related topics

Specifying codes (continued)

Code	Action
Align left (&l)	Left aligns all text that follows.
Align center (&c)	Centers all text that follows.
Align right (&r)	Right aligns all text that follows.
Page number (&p)	Displays page numbers.
Filename (&f)	Displays the name of the current file.
Registered user name (&t)	Displays the name entered at installation of the current copy of Organizer.
Organizer release number (&v)	Displays the Organizer release number.
Section name (&s)	Displays the section name.
Layout name (&k)	Displays the name of the layout you're using.
Paper name (&z)	Displays the name of the paper type you're using.
Report heading (&H)	Displays the report heading of the current layout (for example, Quarterly Planner).
Page date range long (&D)	Displays the date range for the current printing in words (for example, "February 9 - 13, 1997"), or when you're using one of the Daily layouts, the day name and date (for example, "Monday, February 10, 1997").
Page date range short (&J)	Displays the full date range in numeric format for the current printing (for example, "2/3/97 - 2/7/97").
Page date range short (&X)	Displays the date range for the current printing in numeric format (for example, "2/3 - 2/7/97").
Time (&T)	Displays the time for the current printing in numeric format (for example, "12:33 PM").
Today's date (&E)	Displays the date for the current printing in numeric format (for example, "2/7/97").

Back

Specifying codes

Organizer inserts a text string command for each code. This command is in parentheses after the name of the code in this table.

Code	Action
Day as 1,2,3 (&d)	Displays the current day as a single digit, where appropriate.
Day as 01,02,03 (&dd)	Displays the current day as two digits.
Month as 1,2,3 (&M)	Displays the current month as a single digit, where appropriate.
Month as 01,02,03 (&MM)	Displays the current month as two digits.
Month as Jan, Feb (&MMM)	Displays the current month as a three-letter abbreviation.
Month as January, February (&MMMM)	Displays the full name of the current month.
Year as 96, 97 (&yy)	Displays the current year as a two-digit number.
Year as 1996,1997 (&yyyy)	Displays all digits of the current year.
First shown data (&e)	Displays the first item printed (depending on the layout, either a heading or data).
Last shown data (&q)	Displays the last item printed (depending on the layout, either a heading or data).
Hour as 1,2,3 (&h)	Displays the current hour as a single digit, where appropriate.
Hour as 01,02,03 (&hh)	Displays the current hour as two digits.
Minutes as 1,2,3 (&m)	Displays the current minute as a single digit, where appropriate.
Minutes as 01,02,03 (&mm)	Displays the current minute as two digits.
AM or PM suffix (&a)	Displays an AM or PM suffix based on the current time.

Continued

Specifying internal margins

Option	Result
Top	Lets you specify the amount of space to leave between the top of the print area and the first line of printed information.
Left	Lets you specify the amount of space to leave between the left edge of the print area and the left margin of the printed information. This setting indents printed information from the left edge of the print area.
Right	Lets you specify the amount of space to leave between the right edge of the print area and the right margin of the printed information. This setting indents printed information from the right edge of the print area.
Bottom	Lets you specify the amount of space to leave between the bottom edge of the print area and the last line of printed information.

Specifying layout options

Option	Result
Columns	Lets you specify a number of columns.
Width	Lets you enter a width for columns. By default, Organizer automatically adjusts the width of columns based on the number of columns you specified and the margin settings.
Rows	Lets you specify a number of rows.
Height	Lets you enter a height for rows. By default, Organizer automatically adjusts the height of rows based on the number of rows you specified and the margin settings.

Specifying margins

Option	Result
Top	Lets you enter a margin from the top of the paper to the top of the print area.
Left	Lets you enter a margin from the left edge of the paper to the left of the print area.
Right	Lets you enter a margin from the right edge of the paper to the right of the print area.
Bottom	Lets you enter a margin from the bottom of the paper to the bottom of the print area.

Details: Deleting an appointment

Keyboard shortcuts
You can also select an appointment and press CTRL+X or press DEL to delete an appointment.

Deleting an appointment in other ways
You can also select an appointment and choose Edit - Cut or click  to delete an appointment.

{button ,AL(`H_DELETING_AN_APPOINTMENT_STEPS',1)} Go to procedure
{button ,AL(`',0)} See related topics

Deleting an appointment

1. Select the appointment in Calendar you want to delete.
2. Drag and drop the appointment to  in Toolbox.

{button ,AL(`H_DELETING_AN_APPOINTMENT_DETAILS',1)} See details

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;;H_EDITING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;H_FINDING_TIME_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Details: Editing an appointment

Editing an appointment in other ways
You can also select the appointment, and choose Edit - Edit Appointment or press CTRL+E to edit the appointment.

To change just the date of an appointment, drag and drop the appointment to the new date. To edit the time, duration, or description of an appointment, select the appointment, then click the description. The insertion pointer appears in the description and the time tracker appears over the Organizer rings.

When you're working with time slots in the Day per Page view, you can click an appointment time or a time slot and start entering your information for that time. Press F2 or click outside the appointment to enter it. If you then want to change the duration of the appointment, drag the top and/or bottom border to the appropriate time. You can also schedule an appointment in single-minute increments by pressing CTRL and dragging the top and/or bottom border to the appropriate time.

Editing the date, time, and duration of the appointment
To change the date, you can click the "Date" box to display a monthly calendar, then click a date in the calendar. To move to the previous or next month, click the arrows at the top of the calendar. You can also click the "Date" box, then press and ↓ to change to the previous or next day, or enter a date in the "Date" box.

To change the start time and duration, you can click the "Time" box to display the time tracker and specify a time and duration, or, in the "Duration" box, click + (plus) to increase and - (minus) to decrease the duration. You can also click in the "Time" box or "Duration" box and press and ↓ to change the time and duration or enter a time or duration.

Editing the description
Position the mouse pointer over the description, then click and enter the changes.

Editing the options
Click the "Categories" box and select a category for the appointment.

Select or deselect "Warn of conflicts," "Pencil in," or "Confidential" to change the options.

Editing the existing text of an appointment
To edit the existing appointment text, click the appointment to select it, click the text you want to edit, and make the changes. When you're done, press F2 to enter the changes.

{button ,AL(`H_EDITING_AN_APPOINTMENT_STEPS',1)} Go to procedure

{button ,AL(`H_USING_TIME_TRACKER_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_SCHEDULING_A_MEETING_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER',0)} See related topics

Editing an appointment

1. Double-click the appointment.
2. Edit the appointment.

   See details
3. Click OK.

{button ,AL(`H_EDITING_AN_APPOINTMENT_DETAILS',1)} See details

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;H_FINDING_TIME_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Details: Finding time

Changing start-of-day and end-of-day default settings

When finding available time, Organizer uses the default start-of-day and end-of-day settings in your Calendar. To change the time your days in Calendar start or end, you must change the setting with another procedure. Choose View - Calendar Preferences and click the "Days start at" or "Days end at" boxes to select new times, and then return to this procedure.

Including weekends

If you want Organizer to include weekends when it looks for an appointment time, you must change the settings with another procedure. Choose View - Calendar Preferences and select "Include weekends in Find time search," and then return to this procedure.

{button ,AL(`H_FINDING_TIME_STEPS',1)} Go to procedure

Finding time

There are occasions when you need to schedule an appointment for whenever you are next available. You specify the duration for the appointment, and let Organizer find the next available time slot in your schedule. Organizer searches through each day, looking for an opening for the specified duration.

1. Go to the Calendar section and choose Create - Appointment.

2. If necessary, specify the Date on which you want Organizer to begin the search for free time.
3. In the "Duration" box click + (plus) to increase or - (minus) to decrease the duration for the appointment.
4. Click Find Time.

   The "Date" and "Time" settings in the dialog box change to show the next available time for the appointment.

   See details
5. If necessary, repeat step 4 to search for another available time.
6. Enter any other information for the appointment.
7. Click OK.

{button ,AL(`H_FINDING_TIME_DETAILS',1)} See details

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;',0)} See related topics

Making an appointment

1. Go to Calendar and double-click the Calendar page on the date of the appointment.

2. If necessary, click the "Date" box and select a date for the appointment.

   See details

3. Click the "Time" box to use time tracker to select a time for the appointment to start and end.
4. If necessary, click the "Duration" + (plus) to increase or - (minus) to decrease the duration of the appointment.
5. Under "Description," enter a description of the appointment.
6. (Optional) You can select the following options for the appointment: "Categories," "Warn of conflicts, " "Pencil in," and "Confidential."

   See details

7. Click OK.

Tip To create additional appointments, click Add before you click OK. When you finish entering appointments, click OK.

{button ,AL(`H_MAKING_AN_APPOINTMENT_DETAILS',1)} See details

{button ,AL(`H_EDITING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;H_FINDING_TIME_STEPS;H_USING_TIME_TRACKER_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_SCHEDULING_A_MEETING_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;',0)} See related topics

Moving an appointment to a different day

When you move an appointment to another day, the appointment keeps the same start time and duration.

1. Go to the appointment in Calendar you want to move.
2. Click in Toolbox.
3. Select the appointment you want to move by clicking it.
   The mouse pointer changes to .
4. Go to the day you want to move the appointment to.
5. Click that day to move the appointment.

Tip To move an appointment to a day that already appears on the screen, drag and drop the appointment to the new day. To move an appointment to a different Calendar section but keep the same date and time of the appointment, drag and drop the appointment to the section tab for the different Calendar section.

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;H_FINDING_TIME_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;',0)} See related topics

Selecting appointment options

Option	Result
Categories	Lets you establish one or more categories for the appointment.
Warn of conflicts	Alerts (default) or doesn't alert you when there is a conflict with the appointment and another appointment or meeting.
Pencil in	Tentatively enters the appointment.
Confidential	Makes or doesn't make (default) the appointment confidential, so others who have access to your file cannot view the appointment.

Details: Displaying entries in more than one section

Selecting a color to represent Calendar information in Planner
You can show Calendar information (which appears as a color band) in the Planner section so that you can see your commitments grouped in one place. To help you quickly identify Calendar information in Planner, you may want to color code the Calendar information (band). For example, you may want to represent Calendar information (the color band) by using text in the same color that the Calendar section tab uses.

To select a color, click the "Shown through appointment color" box.

{button ,AL(`H_DISPLAYING_ENTRIES_IN_MORE_THAN_ONE_SECTION_STEPS',1)} Go to procedure

Displaying entries in more than one section

By default, your To Do tasks, Calls entries, Planner events, and Anniversary entries are shown into the Calendar section below appointments. You can turn off show through for any section, and you can change preferences for how your show through entries appear in Calendar. You can also show Calendar entries in the Planner section.

1. From any Organizer section, choose Section - Show Through.
2. Click the "Show into" box and select either "Calendar" or "Planner."
3. (Optional) If you want to turn off show through for a section, under "From," deselect the section or sections whose information you don't want to appear in Calendar or Planner.

   Note If you want to redisplay entries for a particular section in Calendar, select the section again.
4. Click Preferences.

   If you're showing information into Calendar, the Calendar Show Through Preferences dialog box appears.

   If you're showing information into Planner, the Planner Show Through Preferences dialog box appears.
5. Depending on your selection in step 4, do the appropriate step, below.
   - For Calendar Preferences, select the appropriate options for the way in which you want your information from other sections to appear in Calendar and click OK.
   - For Planner Preferences, select the color you want to represent your Calendar information and click OK.

   See details
6. Click OK.

Tip To print shown through items, use any of the following print layouts: "Monthly Calendar," "Daily Page," or "Weekly 2-Page."

{button ,AL(`H_DISPLAYING_ENTRIES_IN_MORE_THAN_ONE_SECTION_DETAILS',1)} See details

{button ,AL(`;H_CREATING_AN_ENTRY_STEPS;H_INSERTING_A_CALL_STEPS;H_INSERTING_A_PLANNER_EVENT_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_INSERTING_AN_ANNIVERSARY_STEPS',0)} See related topics

Specifying the display of show-through entries in Calendar

Option	Results
Above appointments	Displays information from other sections above Calendar appointments (default).
Below appointments	Displays information from other sections below Calendar appointments.
First line only	Displays only the first line of information from other sections above or below Calendar appointments.

Note Planner events appear in Calendar as labeled strips of color such as a red strip labeled Vacation, a yellow strip labeled Training, and so on.

Details: Ending Organizer

Ending Organizer in other ways
You can also press ALT+F4, or click to leave Organizer.

{button ,AL(`H_ENDING_ORGANIZER_STEPS',1)} Go to procedure

Ending Organizer

Choose File - Exit Organizer to end Organizer.

Note Changes you make to your file are automatically saved as you work on your file.

{button ,AL(`H_ENDING_ORGANIZER_DETAILS',1)} See details
{button ,AL(`H_STARTING_ORGANIZER_STEPS;',0)} See related topics

Overview: Introducing Organizer

Organizer 97 GS integrates an onscreen calendar, to do list, planner, address book, phone call manager, notepad, anniversary reminder, and group scheduling using Lotus Notes. Organizer lets you stay on top of your schedule, manage your contacts, organize your ideas and information, and more.

With Organizer, you can do the following activities:

- Use the Calendar section to book and set alarms for your appointments.
- Use group scheduling features to schedule group meetings and rooms, select and notify meeting attendees, and view free and busy times by person or date in real time.
- Use the To Do section to create and prioritize task lists.
- Use the Address section to keep track of home and business addresses and phone numbers.
- Use the Calls section to log incoming and outgoing calls by individual, date, company, or category.
- Use the Planner section to monitor long-term events or projects, such as vacations or conferences.
- Use the Notepad section to jot down ideas or import files (including text, numbers, graphics, or, if you have a supported Web browser, home pages).
- Use the Anniversary section to enter and set alarms for important birthdays, anniversaries, or special occasions.
- Print your work in over 40 different print layouts, including monthly calendars and trifolds, or customize a layout to fit in your day planner.
- Work with Organizer away from the LAN and replicate your changes back to your Notes mail file.
- Create categories for entries and assign them cost codes.

{button ,AL(`H_STARTING_ORGANIZER_STEPS;H_ABOUT_NOTEPAD_OVER;H_ABOUT_CALLS_OVER;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_ENDING_ORGANIZER_STEPS;H_ABOUT_ADDRESS_OVER;H_ABOUT_ANNIVERSARY_OVER;H_ABOUT_CALENDAR_OVER;H_ABOUT_PLANNER_OVER;H_ABOUT_THE_ORGANIZER_WORKSPACE_OVER;H_USING_HELP_TO_LEARN_ABOUT_ORGANIZER_OVER',0)} See related topics

Starting Organizer

1. Start Windows 95.
2. Click the Start button and go to where you installed Organizer 97 GS.

   For example, you may have installed Organizer 97 GS in the Lotus Applications folder. If not, go to the place where you installed it.

   Tip To open Organizer automatically whenever you start Windows 95, drag the Organizer icon to the Windows Startup group in Program Manager.
3. If necessary, enter your password.

{button ,AL(`H_ENDING_ORGANIZER_STEPS',0)} See related topics

Details: Exporting an entry

Selecting from the "Field mapping" box
The "Field mapping" box contains the Organizer field-mapping selection "All fields" and the names of any field-mapping selections that you created, named, and saved. If you don't create your own field-mappings, the Organizer default for exporting files is to map all fields from the Organizer file to fields in the export file. However, if you created, named, and saved field-mappings, the last one you created is the default. To select an existing field mapping, click the "Field mapping" box and select the name you want.

Understanding field mapping
When you export information, you're copying from an Organizer file to a file for use in another application. When you map fields, you're selecting which fields from the Organizer file to copy to which locations in the export file. For example, if you're exporting information from Calendar, you may want to export only "Start Date Time," "End Date Time," and "Description." You would map these fields to "Field 1," "Field 2," and "Field 3" in the export file.

Mapping fields for exporting
To map fields, select a field in the "Fields in Organizer section" box and then select a field in the "Fields in export file" box. A line between the fields appears, showing where the Organizer section information will appear in the export file.

Note If you map to the wrong export file field, select the correct field before you map the next field. If you map the wrong Organizer section field, click the Organizer section field to break the mapping, and then resume the mapping process.

Saving field-mapping selections
When you map fields, you can save the field-mapping selections you created for future use—without needing to repeat the actual field mapping. If you export the same type of information to the same applications on a frequent basis, saving the field-mapping selections you create is very useful. For example, if you export Calendar information to a word processing application where you keep weekly meeting agendas and notes, the fields you map from and to are always the same. Save the field-mapping selections to use each time you export that information.

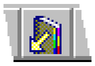
To save field-mapping selections and add the name to the "Field mapping" box, select "All fields" and enter a new name for the field-mapping selections you want to save (entering a new name won't delete the "All fields" mapping option). Map the fields you want and then click Add.

{button ,AL(`H_EXPORTING_AN_ENTRY_STEPS',1)} Go to procedure

Exporting an entry

You can export Organizer information for use in another application. If you want to export information, you must export it in a format that the other application understands. Organizer provides several formats, including ASCII text and dBASE files, that many applications support.

1. Choose File - Export.



2. Click the "Look in" box and select the path Organizer must use to export the information.
3. For "File name," enter the name of the file you want to export.
4. Click the "Files of type" box and select the type of file you want to export.
5. Click the "From section" box and select the section from which you want to export information.
6. Click the "Field mapping" box and select the field mapping you want to use.
   See details
7. Click Mapping to map specific fields and save your field-mapping selections.
   See details
8. Click the appropriate command buttons to modify field-mapping selections.
9. Click OK.
10. Click Options to select additional export options.
11. Click OK.
12. Click Export.

Note To export a subset of information, apply a filter to the section before you export the information.

{button ,AL(`H_EXPORTING_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_FILTER_STEPS;H_FILTERING_SELECTED_NAMES_AND_ADDRESSES_STEPS;H_MAPPING_FIELDS_WHILE_IMPORTING_OR_EXPORTING_ENTRIES_STEPS;H_IMPORTING_AN_ENTRY_STEPS;',0)} See related topics

Details: Importing an entry

Selecting from the "Field mapping" box
The "Field mapping" box contains the Organizer field-mapping selection "All fields" and the names of any field-mapping selections that you created, named, and saved. If you don't create your own field-mappings, the Organizer default for importing files is to map all fields from the import file to fields in the Organizer section. However, if you created, named, and saved field-mappings, the last one you created is the default. To select an existing field mapping, click the "Field mapping" box and select the name you want.

Understanding field mapping
When you import information, you're copying from a file created in another application to a section in an Organizer file. When you map fields, you're selecting which fields from the import file to copy to fields in the Organizer section. For example, if you're importing name and address information into Address, you'll want to map the fields in the import file to the matching fields in the Organizer Address section. You can map specific fields rather than all fields. For example, you can import a file from an application whose fields are named differently from the fields in Organizer, or you can import only a portion of the information contained in the import file, such as name and telephone number.

Mapping fields for importing
To map fields, select a field in the "Fields in import file" box and then select a field in the "Fields in Organizer section" box. A line between the fields appears, showing where the import file information will appear in the Organizer section.

Note If you map to the wrong Organizer section field, select the correct field before you map the next field. If you map the wrong import file field, click the import file field to break the mapping, and then resume the mapping process.

Saving field-mapping selections
When you map fields, you can save the field-mapping selections you created for future use—without needing to repeat the actual field mapping. If you import the same type of information to the same sections on a frequent basis, saving the field-mapping selections you create is very useful. For example, if you import weekly meeting agendas and notes to Notepad, the fields you map from and to are always the same. Save the field-mapping selections to use each time you import that information.

To save field-mapping selections and add the name to the "Field mapping" box, select "All fields" and enter a new name for the field-mapping selections you want to save (entering a new name won't delete the "All fields" mapping option). Map the fields you want and then click Add.

{button ,AL(`H_IMPORTING_AN_ENTRY_STEPS',1)} Go to procedure

Details: Changing field-mapping selections for import or export

Selecting from the "Field mapping name" box

The "Field mapping name" box contains the Organizer field-mapping selection "All fields" and the names of those field-mapping selections that you created, named, and saved. If you don't create your own field-mappings, the Organizer default for importing files is to map all fields from the import file to fields in the Organizer section. However, if you created, named, and saved field-mappings, the last one you created is the default. To select a field map, click the "Field mapping name" box and select the name you want.

Adding field-mapping selections

When you map fields, you can save the field-mapping selections you create for future use—without needing to repeat the actual field map. If you import or export the same type of information to the same applications on a frequent basis, saving the field-mapping selections you create is very useful.

To add any field-mapping selections to the "Field mapping name" box, select "All fields" and enter a new name for the field-mapping selections you want to save (entering a new name won't delete the "All fields" mapping option). Map the fields you want and then click Add. The field map you saved is added to the "Field mapping name" box.

Removing field-mapping selections

To remove any field-mapping selections you added to the "Field mapping name" box, select the name you want to remove and click Remove.

Changing field-mapping selections using Update, Clear All, and Map All

To update any field-mapping selections you added to the "Field mapping name" box, select the name you want to update. Make changes to the field mappings and then click Update.

While updating field-mapping selections, you may find it easier to clear all existing mappings. To clear all field-mapping selections, click Clear All. If you want to map all fields from one file, in sequence, to all fields in the other file, click Map All.

{button ,AL(`H_MAPPING_FIELDS_WHILE_IMPORTING_OR_EXPORTING_ENTRIES_STEPS',1)} Go to procedure

Changing field-mapping selections for import or export

1. Choose File - Import or File - Export.
2. Complete all steps necessary for importing or exporting an entry except for mapping fields.
3. Click Mapping to create or change field-mapping selections.

   See details
4. Click OK.

{button ,AL(`H_MAPPING_FIELDS_WHILE_IMPORTING_OR_EXPORTING_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_EXPORTING_AN_ENTRY_STEPS;H_IMPORTING_AN_ENTRY_STEPS;H_CREATING_A_FILTER_STEPS;H_FILTERING_SELECTED_NAMES_AND_ADDRESSES_STEPS;',0)} See related topics

Using export file options

Option	Results
Translate CR/LF to	Translates or doesn't translate (default) the CR/LF (or carriage return/line feed) character in Organizer files to any of the following characters the target application can interpret: CR, LF, LF/CR, SPACE, or TAB.
Delete exported records	Automatically deletes or doesn't delete (default) the record from Organizer after you export it.
Field names as first record	Exports (default) or doesn't export field names as the first line in the exported file. This option is available if you're exporting in ASCII Text file format only.

Using export mapping command buttons

Command button	Result
Map All	Connects, in sequence, all fields in the Organizer section to all fields in the export file, exactly as you see the fields listed side-by-side in the Export Mapping dialog box.
Clear All	Clears all field mappings for the specified field-mapping name.
Add	Adds the specified field-mapping name you created to the list of available mappings in the "Field mapping" box.
Remove	Removes the specified field-mapping name from the list of available mappings in the "Field mapping" box.
Update	Updates the specified field-mapping name with current field mappings.

Using import file options

Option	Results
File translation	Translates the file you're importing with a format Organizer can accept. ("Windows (ANSI)" is the default translation.)
Ignore duplicate records	Ignores or doesn't ignore (default) any existing records in Organizer that are duplicates of the record you're importing.
Field names as first record	Imports (default) or doesn't import field names first. This option is available if you're importing in ASCII Text file format only and the field names are at the beginning of the file.

Using import mapping command buttons

Command button	Result
Map All	Connects, in sequence, all fields in the import file to all fields in the Organizer section, exactly as you see the fields listed side-by-side in the Import Mapping dialog box.
Clear All	Clears all field mappings for the specified field-mapping name.
Add	Adds the specified field-mapping name you created to the list of available mappings in the "Field mapping" box.
Remove	Removes the specified field-mapping name from the list of available mappings in the "Field mapping" box.
Update	Updates the specified field-mapping name with current field mappings.

Finding text command buttons

Command button	Result
Find Next	Finds the next entry within which the specified text appears.
Find All	Finds all entries within which the specified text appears.
Close	Closes the Find dialog box.
Turn To	Turns to the entry you select.

Details: Finding text

Keyboard shortcuts
You can also press CTRL+F to find and move to a specific text entry.

Using "Case sensitive" and "Whole word"
Depending on what you're looking for, you can enter a few characters, a word, or a phrase to find. "Case sensitive" searches for text that matches exactly with the case in the text you enter. For example, if you're looking for "Principal," you might enter Principal with an uppercase P and select "Case sensitive." That way, you wouldn't find any lowercase occurrences of principal. "Whole word" searches for text that matches what you enter in whole words specifically, not just part of a word. For example, if you enter the word bank and you select the 'Whole word" option, you will find only bank as a whole word; that is, you won't find banks, banking, or Bankston. If you don't select either option, the default is to search for any text you enter, regardless of case sensitivity or whole word status.

Finding text in a section or all sections
You can find text from any section of Organizer. If you go to the section in which you want to look for text, the default will be to look in that section. For example, if you know that you want to look for a name in the Address section, you can go to Address to begin your find. Alternatively, you can begin from any section and then select the section you wish to search or select all sections.

Understanding how the Occurrences box works
Entries that match your text search appear in the "Occurrences" box. "Occurrences" displays your matches in either of two ways: one text match at a time or all text matches in a list. For example, if you search for the word Bank, Organizer finds all entries containing the word Bank. You can use the word Bank as a last name in one entry, as the name of a company in the next entry, and as the name of a street address in another entry. Under "Occurrences," select the entry you want to see, click Turn to, and Organizer goes to the entry you selected.

After a find, you can select to clear the list of occurrences and append any newly found matches to the list. For example, if you have found 3 matches for bank, and you'd like to also find entries containing savings, you can select "Append to list" to add the new matches to the 3 in the "Occurrences" box.

Using the Find next and Find all command buttons
When you click Find Next, Organizer finds one entry at a time for you and turns to that entry. If you want Organizer to find all matches and display them for you as a list, click Find all. All matching entries will appear in "Occurrences." If no match is found, Organizer displays a message saying the text you're searching for can't be found.

Finding information with filters
You can also find information in Organizer sections with filters. A filter is a tool that allows you to display a subset of your Organizer entries based on criteria you specify. You can create filters based on text, numbers, dates, Organizer attributes (such as cost code or category) or any combination of these.

Finding an Address record in the Address section
You can quickly find an Address record in your Address section. Depending on how you sorted your Address records, go to your Address section and type the first several letters and/or numbers of the last name, company name, zip code, or category you specified in the Address record you want to find. Organizer automatically turns to the first entry that most closely matches the text you typed.

{button ,AL(`H_FINDING_TEXT_STEPS',1)} Go to procedure

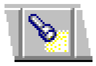
Finding text in Organizer

Option	Result
Find	Uses the text you enter to locate the specific entry.
Case sensitive	Searches for an exact text match, including capitalization you use.
Whole word	Searches for whole words specifically, not just a part of a word.
Section	Searches for text within the Organizer section you specify.
All sections	Searches for text within all sections of Organizer.
Occurrences	Lists the entries within which the text match was found.
Clear list	Clears the list after each text search is completed (default).
Append to list	Maintains a list of all text search matches.

Finding text

You can find specific text in any entry in any Organizer section by entering the same text contained in the entry you want to find.

1. From any Organizer section, choose Edit - Find.



2. For "Find," enter the text you want to find.

   See details

3. Select the appropriate options.
4. Click the appropriate command button.

Note You can also use filters to find entries containing text or matching other criteria that you specify.

{button ,AL(`H_FINDING_TEXT_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;',0)} See related topics

Overview: New features in Organizer

Organizer offers enhancements to its personal information management (PIM) and group scheduling features. This release includes the following enhancements:

Calendar

- A new Multiple Calendar view that lets you graphically display more than one calendar. Organizer lets you display two or more calendars side by side using Multiple Calendar view so you can review your calendar and another user's calendar at the same time. To display multiple calendars, Organizer must be in Day per Page, time slot view. See Overview: Working with Multiple Calendars.

Group scheduling with Notes 4.51

- Seamless group scheduling interoperability with Notes 4.51 group scheduling users
- For Organizer 2.11 interoperability, a Notes server add-in task to allow Organizer 97 GS users to view free-time availability for Organizer 2.11 users

General

- Organizer links to Internet sites. You can create a link to launch any World Wide Web (Web) page.
- A new icon available in your set of SmartIcons that lets you launch the Lotus Organizer home page (www.lotus.com/Organizer) with a single click from Organizer.
- A new icon available in your set of SmartIcons that lets you go directly to the Web page (www.lotus.com/Organizer/content) where you can download an updated and expanded Almanac file set (ALMANAC.NSF and FODORS.NSF). You can consult the Almanac in Organizer for reference information that includes holidays, time zones, telephone area codes, important 800 telephone numbers, travel tips, time management information, and more.

  See Using ALMANAC.NSF and FODORS.NSF for more information on using the Almanac files.
- All of the new features available in Organizer 97, such as graphical daily view, support for the Telephony API (TAPI) autodialer, rich text formatting in the Notepad, and support for OLE linking and embedding in the Notepad section.
- An Organizer Tour that gives you an overview of the new group scheduling features.
- An easy way to view your To Do tasks, Calls entries, Planner events, and Anniversary entries in your Calendar. Your entries in the To Do, Calls, Planner, and Anniversary sections are now shown into the Calendar section by default.

Overview: New group-scheduling features for 2.x upgraders

Organizer 97 GS uses Notes for group scheduling. Organizer and Notes work interactively: you can schedule meetings and respond to invitations in either program. For example, when you send a meeting invitation using Organizer, the invitation is sent as both an Organizer meeting notice and a Notes mail message; and when you accept an invitation, the meeting is entered into both your Organizer and Notes calendars.

Due to this tight integration, many group-scheduling preferences previously entered through Organizer are now set in the Notes Calendar Profile and Delegation Profile. For example, you specify your available free time in the Notes Calendar Profile, and you indicate the other users who can view or manage your calendar in the Notes Delegation Profile.

Other new group-scheduling features in Organizer 97 GS include the following:

- A streamlined user interface for scheduling meetings, including a new tabbed dialog box.
- Type-ahead addressing when specifying attendees for a meeting.
- Integration with Notes Resource Reservations database when specifying room and resources for a meeting.
- List of recommended available times in addition to the Find Time functionality.
- More information with notices in the Meeting Notices dialog box.
- Ability to select multiple notices for deletion in the Meeting Notices dialog box.
- Automatic processing of Accept, Decline, Delegate, and Pencil In responses for meetings of which you are chairperson. You receive a Notes mail message, but not an Organizer meeting notice.
- Access to all Organizer information (including meeting notices) locally when you replicate your Notes mail database for use while away from the network.
- Ability to manually or automatically update the status of To Do tasks in Organizer from your Notes mail file. For more information, see Updating and checking the status of To Do tasks.

Note If any cc:Mail users in your department or work group currently use Organizer Release 2.x, your system administrator can set up your Notes system so that you, as an Organizer 97 GS user, can view free time and busy time and schedule group meetings with these cc:Mail and Organizer Release 2.x users. See your system administrator for information on whether this feature is available at your site.

{button ,AL(`;H_SETTING_UP_NOTES_FOR_ORGANIZER_GROUP_SCHEDULING_OVER;H_OVERVIEW_GROUP_SCHEDULING_OVER;H_SCHEDULING_A_MEETING_STEPS;H_UPDATING_THE_STATUS_OF_TO_DO_TASKS_STEPS',0)} See related topics

Using ALMANAC.NSF and FODORS.NSF

ALMANAC.NSF is a Notes mail file containing reference information that includes holidays, time zones, telephone area codes, important 800 telephone numbers, travel tips, and time management information. You can open this file in Organizer, or you can include individual sections from it in your Organizer. FODORS.NSF is a Notes Personal Address Book file that contains the names and addresses of many popular restaurants. You can include FODORS.NSF in ALMANAC.NSF or in one of your own files.

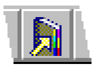
To use these files in Organizer, you must copy them to your Notes default local database folder. To verify the location of this folder, in Notes, choose File - Tools - User Preferences, and look under "Local database folder." Then, see Opening an Organizer file by database name for more information on opening files; or see Including sections from other Organizer files for more information on how to include sections from other files in your own file.

Importing an entry

You can import entries from ASCII text files, dBASE, and FoxPro. Most databases, word processors, and spreadsheets export data in one of these formats.

You can also import information from Organizer 2.x, Organizer 97, and Organizer 97 GS (.OR4). If you choose to import an .ORx file, Organizer automatically sets the appropriate options for you in the Import dialog box. If your .ORx file has multiple Address sections, you can also map them to a particular Notes Personal Name and Address Book. For specific steps on importing information from an .ORx file, see Migrating Organizer information to a Notes Mail file for group scheduling.

1. Choose File - Import.



2. Click the "Look in" box and select the path Organizer must use to import the information you want.
3. For "File name," enter the name of the file you want to import.
4. Click the "Files of type" box and select the type of file you want to import.
5. Click the "Into section" box and select the section into which you want to import information.
6. Click the "Field mapping" box and select the field mapping you want to use.

   See details
7. Click Mapping to map specific fields and save your field-mapping selections.

   See details
8. (Optional) Click the appropriate command buttons to modify field-mapping selections.
9. Click OK.
10. Click Options to select additional import options.
11. Click OK.
12. Click Import.

{button ,AL(`H_IMPORTING_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_FILTER_STEPS;H_FILTERING_SELECTED_NAMES_AND_ADDRESSES_STEPS;H_EXPORTING_ADDRESS_RECORDS_FROM_THE_ADDRESS_SECTION_STEPS;H_MAPPING_FIELDS_WHILE_IMPORTING_OR_EXPORTING_ENTRIES_STEPS;H_EXPORTING_AN_ENTRY_STEPS;H_IMPORTING_ADDRESS_RECORDS_INTO_THE_ADDRESS_SECTION_STEPS;H_MOVING_ORGANIZER_INFORMATION_TO_A_NOTES_MAIL_FILE_FOR_GROUP_SCHEDULING_STEPS',0)} See related topics

Starting another application from Organizer

You can start an application from the Calendar, To Do, Calls, Planner, and Anniversary sections. Starting an application works in conjunction with setting an alarm.

1. Create or edit an entry.
2. Click Alarm.
3. In the "Start" box, enter the path and file name of the application you want to start.

   If necessary, click Browse to see a listing of available applications, select one, and then click Open.
4. Click OK to confirm your selection.
5. Click OK.

{button ,AL(`H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_ATTACHING_A_SCRIPT_TO_AN_ICON_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_LINKING_TO_A_URL_ON_THE_INTERNET_STEPS',0)} See related topics

Details: Making an appointment

Creating an appointment in other ways
When you're in the Calendar section, you can also choose Create - Appointment or press INS to create an appointment.

Specifying the date of an appointment
You can click the "Date" box to display a monthly calendar, then click a date in the calendar. To move to the previous or next month, click the arrows at the top of the calendar. You can also click the "Date" box, then press and ↓ to change to the previous or next day, or enter a date in the "Date" box.

You can also drag and drop in Toolbox to the date on the Calendar page you want. The date you drag to appears in the Create appointment dialog box.

Changing an appointment to a meeting
To invite other users to an appointment, select the appointment and choose Appointment - Invite. The Schedule Meeting dialog box appears to let you select the attendees and other meeting options.

You can also change an appointment to a meeting by editing the meeting and clicking Invite to display the Schedule Meeting dialog box.

If the Invite menu command or button appears dimmed, you don't have access to group-scheduling features. See your system administrator or installation documentation for more information.

Selecting the "Warn of conflicts" option for conflicting Notes and Organizer appointments
If you select the "Enable conflict checking for Appointments/Meetings" option in the Notes Calendar Profile and then create an appointment or meeting in Notes, Organizer warns you whenever you create an appointment or meeting in Organizer that conflicts with the appointment or meeting you created in Notes, regardless of whether you select the "Warn of conflicts" option in the Organizer Create Appointment dialog box.

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS',1)} Go to procedure

{button ,AL(`H_USING_TIME_TRACKER_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Details: Resolving conflicting appointments

Changing the date, time, and duration
To change the date, you can click the "Date" box to display a monthly calendar, then click a date in the calendar. To move to the previous or next month, click the arrows at the top of the calendar. You can also click the "Date" box, then press and ↓ to change to the previous or next day, or enter a date in the "Date" box.

To change the start time and duration, you can click the "Time" box to display time tracker and specify a time and duration, or, in the "Duration" box, click + (plus) to increase and - (minus) to decrease the duration. You can also click in the "Time" box or "Duration" box and press and ↓ to change the time and duration or enter a time or duration.

Displaying conflicting appointments
Organizer displays a red line to the left of conflicting appointments and meetings. The exception to this is when you are working with time slots in the Day per page view. In this view, Organizer displays the conflicting appointments or meetings side-by-side.

Turning the alert on and off
The default setting is to alert you when you are creating a schedule conflict. If you prefer not to be alerted, choose View - Calendar Preferences and deselect "Show conflicts."   You can also deselect the "Warn of conflicts options" for individual appointments or meetings.

If you select the "Enable conflict checking for Appointments/Meetings" option in the Notes Calendar Profile and then create an appointment or meeting in Notes, Organizer warns you whenever you create an appointment or meeting in Organizer that conflicts with the appointment or meeting you created in Notes, regardless of whether you select the "Warn of conflicts" option in the Organizer Create Appointment dialog box.

Note In the Day per Page view, if you are working with time slots and click either a time slot or a time in the time ruler to create an appointment, Organizer doesn't notify you of an appointment or meeting conflict. Because you can view the conflict, it's assumed you are scheduling it intentionally.

{button ,AL(`H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS',1)} Go to procedure
{button ,AL(`H_USING_TIME_TRACKER_STEPS;',0)} See related topics

Resolving conflicting appointments

When you're about to create an appointment or schedule a meeting that conflicts with an appointment or meeting that already appears in your calendar, Organizer displays the Conflicting Appointment dialog box. You can schedule the appointment as a conflict, decline the meeting, or resolve the conflict. To schedule the appointment as a conflict, click OK. To decline the meeting click Decline. To resolve the conflict, perform the following steps.

1. Do one of the following:
    - Click Turn To to display the date of the conflicting appointment or meeting to see other available times.
    - Change the date, time, or duration of the appointment or meeting.

      See details
    - Click Find Time and Organizer will automatically find the next available time after the conflicting appointment or meeting.
2. (Optional) If you changed the date, time, or duration of a meeting either by yourself or with the Find Time feature, click Reschedule to propose this new meeting time to the chairperson of the meeting.

{button ,AL(`H_RESOLVING_CONFLICTING_APPOINTMENTS_DETAILS',1)} See details

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_FINDING_TIME_STEPS;',0)} See related topics

Details: Moving between entries

Moving between entries in other ways
To move between Organizer entries, press , ↓, →, or ← , click , and/or press TAB.

{button ,AL(`H_MOVING_BETWEEN_ENTRIES_STEPS',1)} Go to procedure

Moving between entries

You can move to any entry you want by positioning your mouse pointer on the entry and clicking.

{button ,AL(`H_MOVING_BETWEEN_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_STEPS;H_MOVING_TO_A_SPECIFIC_DATE_STEPS;H_MOVING_TO_A_SPECIFIC_ENTRY_STEPS;H_ABOUT_KEYBOARD_SHORTCUTS_OVER;H_ABOUT_MOUSE_SHORTCUTS_OVER',0)} See related topics

Details: Moving between sections

Keyboard shortcuts
You can also press CTRL+G and make a selection to move between Organizer sections.

Selecting date, status, name, year, and page
When you choose Edit - Go To and select a section, you can specify where within the section you want to go to. Specify "Date" for the Calendar and Anniversary sections, "Status" for the To Do section, "Last name" or "Name" for the Address or Calls sections, "Year" for the Planner section, and "Page" for the Notepad section.

Using the Turn To command button
When you're in the Go To dialog box, click Turn To when you want to go to a specific section without closing the dialog box.

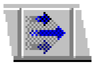
Note When you are in the To Do section and choose Edit - Go To, "Status" is the default, but you can also specify "Priority," "Start date," "Category," "Due date," or "Completion date" because Edit - Go To in the To Do section works in conjunction with how your To Do tasks are sorted.

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_STEPS',1)} Go to procedure

Moving between sections

The quickest way to move to a section is to click the section tab. You can use Edit - Go To to move to a specific section, status, name, or page in a section.

1. Choose Edit - Go To.



2. Click the Section box and select the section you want to go to.
3. Select the date, status, name, year, or page you want to go to.

   See details

4. Click OK.

Tip You can also move between sections by choosing Section - Turn To and selecting a section from the menu that appears. If there are more sections than can fit in the menu, Organizer displays a dialog box that lists all sections. Select a section and click OK to move to the section.

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_DETAILS',1)} See details

{button ,AL(`H_MOVING_BETWEEN_ENTRIES_STEPS;H_MOVING_TO_A_SPECIFIC_DATE_STEPS;H_MOVING_TO_A_SPECIFIC_ENTRY_STEPS',0)} See related topics

Moving to a specific date

1. Click the Calendar section 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 tab along the left or right side of the current year calendar.

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_STEPS;H_MOVING_BETWEEN_ENTRIES_STEPS;H_MOVING_TO_A_SPECIFIC_ENTRY_STEPS',0)} <u>See related topics</u>

Details: Moving to a specific entry

Keyboard shortcuts
You can also press CTRL+F to find and move to a specific text entry.

Using "Case sensitive" and "Whole word"
Depending on what you're looking for, you can enter a few characters, a word, or a phrase to find. "Case sensitive" searches for text that matches exactly with the case in the text you enter. For example, if you're looking for "Principal," you might enter Principal with an uppercase P and select "Case sensitive." That way, you wouldn't find any lowercase occurrences of principal. "Whole word" searches for text that matches what you enter in whole words specifically, not just part of a word. For example, if you enter the word bank and you select "Whole word," you will find only bank as a whole word; that is, you won't find banks, banking, or Bankston. If you don't select either option, the default is to search for any text you enter, regardless of case sensitivity or whole word status.

Finding text in a section or all sections
You can find text from any section of Organizer. If you go to the section in which you want to look for text, the default will be to look in that section. For example, if you know that you want to look for a name in the Address section, you can go to Address to begin your find. Alternatively, you can begin from any section and then select the section you want to search or select all sections.

Understanding how the "Occurrences" box works
Entries that match your text search appear in the "Occurrences" box. The box under "Occurrences" displays your matches in either of two ways: one text match at a time or all text matches in a list. For example, if you search for the word Bank, Organizer finds all entries containing the word Bank. You can use the word Bank as a last name in one entry, as the name of a company in the next entry, and as the name of a street address in another entry. In the box under "Occurrences," select the entry you want to see, click Turn To, and Organizer goes to the entry you selected.

After a find, you can select to clear the list of occurrences and append any newly found matches to the list. For example, if you have found 3 matches for Bank, and you'd like to also find entries containing savings, you can select "Append to list" to add the new matches to the 3 in the box under "Occurrences."

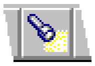
Using the Find Next and Find All command buttons
When you click Find Next, Organizer finds one entry at a time for you and turns to that entry. If you want Organizer to find all matches and display them for you as a list, click Find All. All matching entries will appear in the box under "Occurrences." If no match is found, Organizer displays a message saying the text you're searching for can't be found.

{button ,AL(`H_MOVING_TO_A_SPECIFIC_ENTRY_STEPS',1)} Go to procedure

Moving to a specific entry

You can move to a specific entry of any Organizer section by entering the same text that is in the entry you want to go to. The text can come from within any field of the entry.

1. Choose Edit - Find.



2. For "Find," enter the text that you want to find.

   See details

3. Select the appropriate options.
4. Click the appropriate command button.

{button ,AL(`H_MOVING_TO_A_SPECIFIC_ENTRY_DETAILS',1)} See details

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_STEPS;H_MOVING_BETWEEN_ENTRIES_STEPS;H_MOVING_TO_A_SPECIFIC_DATE_STEPS;',0)} See related topics

Moving to specific entries

Option	Result
Find	Uses the text you enter to locate the specific entry.
Case sensitive	Searches for an exact text match, including capitalization you use.
Whole word	Searches for whole words specifically, not just a part of a word.
Section	Searches for text within the Organizer section you specify.
All sections	Searches for text within all sections of Organizer.
Occurrences	Lists the entries within which the text match was found.
Clear list	Clears the list after each text search is completed (default).
Append to list	Maintains a list of all text search matches.

Using commands to move to specific entries

Command button	Result
Find next	Finds the next entry within which the specified text appears.
Find all	Finds all entries within which the specified text appears.
Close	Closes the Find dialog box.
Turn To	Turns to the entry you select.

Details: Opening someone else's file

Keyboard shortcut
You can also press CTRL+O to open an Organizer file.

Getting access to someone else's file
You can open another user's Notes mail file if you have the appropriate access level privileges in the other user's mail file. Your privileges also determine whether you can make changes to the file in Organizer.

The owner of the file uses the Delegation Profile in Notes to allow other users to read or manage their information in Organizer. To display the Delegation Profile, in your mail file in Notes, choose Actions - Calendar Tools - Calendar Profile to display the Notes Calendar Profile and click "Allow other users to view your calendar."

If the owner selects "Everyone can read my Calendar" in the Delegation Profile, you can open and read the file, but can't create entries or respond to meeting invitations.

If the owner selects "Everyone can manage my Calendar," you can open the file and create entries in it. In the Calendar section, you can also schedule meetings and respond to meeting invitations for the owner. The owner can also specify only certain users who can read or manage their Organizer information.

Note If you want to use filters, or add or remove sections in another user's mail file, the owner of the file must grant you Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile.

See the Notes Help system or your system administrator for more information on granting access to Notes mail files.

Opening a file by user name
You can either enter the user name or select the user name from the list.

As you enter a user name in the "File name" box, Organizer attempts to match the letters you enter with names in the list and supply the rest of the name. You can also change the Address Book. Click the "Address" box and make your selection.

Opening a file by database name
Under "Server," you can select the Notes server where the file you want to open is located. Choose "Local" to specify a file located on your own computer.

Under "Database," enter the name of the file you want to open. Be sure to include the path to the location of the file on the server (for example, \mail\EMurray.NSF).

If you chose "Local" under "Server," enter only the name of the file (for example EMurray.NSF). Organizer can only open files located in the subdirectory specified in Notes User Preferences under "Local database folder." The default is typically the Notes \DATA directory (for example, C:\NOTES\DATA).

To change or view your Notes User Preferences, in Notes, choose File - Tools - User Preferences. See the Notes Help system for more information on User Preferences.

{button ,AL(`H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_STEPS',1)} Go to procedure

Opening someone else's file

You can open the file of any other user who granted you access rights to their file. You can open a file by user name or database name.

Note When you open someone else's file, you won't have access to their Address section. Because Organizer automatically displays the local Notes Personal Name and Address Book as an included section, the Address section that you see is your own Personal Name and Address Book (NAMES.NSF), typically located in the Notes \DATA directory, on your own local hard drive (for example C:\NOTES\DATA).

1. Verify that the person whose file you want to open has given you access to read or manage their file.

   See details

2. Choose File - Open.

   See details

3. If you want to open a file by user name, click the Names tab and select the file you want to open.

   See details

4. If you want to open a file by database name, click the Database tab, select the server, and enter the database name.

   See details

5. Click OK.
6. If the file you selected has a password, enter the password and click OK.

Organizer displays the user name of the open file in the title bar. This information comes from the "Mail File Owner" field in your mail file's Calendar Profile. To display the Calendar profile for your mail file, select your mail file icon in the Notes workspace and choose Action - Calendar Tools - Calendar Profile. For more information on Calendar Profiles, see Notes Help.

Caution When you share files with others, you need to coordinate access times with the people who have access to your file. If two people work on the same file at the same time and both people edit the same entry, the last person's edits will overwrite those of the first person.

{button ,AL(`H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_DETAILS',1)} See details

{button ,AL(`H_SHARING_SECTIONS_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_OVERVIEW_ACCESS_CONTROL_OVER;H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS;H_RESOLVING_REPLICATION_CONFLICTS_STEPS',0)} See related topics

Overview: Sharing your Notes mail file in Organizer

If you share your Notes mail file with other Organizer users so that they have access to your information in Organizer, you can control different types of access to your file. You give access rights to your Notes mail file through Notes. With the appropriate access, other users can open your file or add sections from your file into their own file.

You can limit users' access to your free time for group scheduling. You can also allow other users access to read or manage your calendar so that they can open your file or add your Calendar section to an Organizer binder.

Using the Notes Calendar Profile to give others access to your free time

You must create a Notes Calendar Profile to set the users who can view your free time while scheduling meetings (the default is to let all users view free time).

To create or edit the Notes Calendar Profile, select your mail file icon in Notes and choose Actions - Calendar Tools - Calendar Profile. See the Notes Help system for more information on specifying scheduling options in the Calendar Profile.

Using the Notes Delegation Profile to give others access to your Organizer information

You can use the Delegation Profile in Notes to allow other users to read or manage your information in Organizer. When you make changes in the Delegation Profile, you're actually changing the file's Access Control List (ACL) settings. Therefore, you must have Manager access to your mail file in order to see or change the Delegation Profile.

To view and modify the Delegation Profile in Notes, select the mail file icon and choose Actions - Calendar Tools - Calendar Profile, and click "Allow other users to view your calendar."

If you select "Everyone can read my Calendar" in the Delegation Profile, other users can open your file or add sections from your file to an Organizer binder, but they can't create entries. A user who has the right to read another user's calendar is assigned "No Access" for private documents and has Read access for public (non-confidential) entries only.

Note With this access, if another user opens your file or adds your Calendar section to their Organizer binder, they can display your calendar in Multiple Calendar view, but can't create appointments, or respond to meeting invitations for you.

If you select "Everyone can manage my Calendar," you assign the user "No Access" for private documents and Read and Write access for public documents. Other users can view your file or the Organizer sections they include from your file and also create non-confidential entries; they can't create or view confidential entries. In the Calendar section, they can also schedule meetings and respond to meeting invitations for you. You can also specify only certain users who can read or manage your Organizer information.

See the Notes Help system for more information on modifying the Delegation Profile.

Letting others use filters in, add sections to, or remove sections from your file

If another user assigned to manage your calendar wants to use filters in, add sections to, or remove sections from your file, the user must have “Editor” access with the option “Create shared folders/views” selected for your mail file. This level of access is also required for users who want to upgrade another user's Organizer file. Either you or the user you assigned to manage your calendar can set this level of access in the ACL. To modify the ACL in Notes, select the mail file icon and choose File - Database - Access Control. See the Notes Help system or your system administrator for more information on modifiying the ACL.

Letting others change views in your file

If another user assigned to manage your calendar wants to switch to another Organizer view in your file, and you haven't already switched to that view, the user must have “Editor” access with the option “Create shared folders/views” selected in your mail file. For example, if an assistant wants to switch from "View by Priority" to "View by Status" in the To Do section and the owner of the file hasn't previously used "View by Status," the assistant needs to either ask the owner to initialize the view by selecting it, or the owner can grant the user “Editor” access with the option “Create shared folders/views.” See the Notes Help system or your system administrator for more information on modifiying the ACL.

{button ,AL(`H_TROUBLESHOOTING_FILES_OVER;H_OPENING_AN_ORGANIZER_FILE_BY_DATABASE_NAME_STEPS;H_OPENING_AN_ORGANIZER_FILE_BY_USER_NAME_STEPS;H_ADDING_A_CALENDAR_TO_MULTIPLE_CALENDAR_VIEW_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS',0)} See related topics

Overview: Sharing and replicating files

Organizer 97 GS stores information in your Notes mail database. To allow other users to read or work with your Organizer information, you must use the Notes Delegation Profile. To display the Delegation Profile, display the Notes Calendar Profile and click "Allow other users to view your calendar."

If you select "Everyone can read my Calendar" in the Delegation Profile, other users can add one or more of your sections to their Organizer binder or display your calendar in Multiple Calendar view, but can't create entries in your sections. If you select "Everyone can manage my Calendar," other users can view your Organizer information and also create entries, schedule meetings, and respond to meeting invitations for you. You can also specify that only certain users can read or manage your Organizer information through the Notes Delegation Profile.

The users to whom you grant manager access can also make changes in Organizer to the version of your file on the network while you are away from the office working in a local replica copy. For example, an assistant might keep a list of calls for you to make or update your To Do list. When you replicate your Notes mail file back to the server, changes you've made in your local replica are incorporated into the server version of your file, and changes made by other users in the server version appear in your local replica.

Note See the Notes Help system for more information on granting other users access to your Notes mail database and for more information on replicating your mail file.

{button ,AL(`H_TROUBLESHOOTING_FILES_OVER;H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_STEPS;H_OVERVIEW_ACCESS_CONTROL_OVER;H_ABOUT_USING_ORGANIZER_ON_A_LAPTOP_OVER',0)} See related topics

Allowing your sections to be included in other Organizer files

You can make sections from your Organizer file available so that other users can include them in their Organizer files. To do so, you make changes to the Delegation Profile in your Notes mail file.

To display the Delegation Profile, in your mail file in Notes, choose Actions - Calendar Tools - Calendar Profile to display the Notes Calendar Profile and click "Allow other users to view your calendar."

If you select "Everyone can read my Calendar" in the Delegation Profile, other users can add sections from your file to an Organizer binder, but can't create entries in the included section.

Note With this access, if another user adds your Calendar section to their Organizer binder, they can display your calendar in Multiple Calendar view, but can't create appointments, or respond to meeting invitations for you.

If you select "Everyone can manage my Calendar," other users can include sections from your Organizer file and create entries in those sections. In the Calendar section, they can also schedule meetings and respond to meeting invitations for you. You can also specify only certain users who can read or manage your Organizer information.

Note If you want another user to be able to use filters in a section included from your mail file, you must grant Editor access with the right to "Create shared folders/views." You grant this level of access directly through the Notes Access Control List (ACL) for the mail file. You can't grant this level of access through the mail file's Delegation Profile.

See the Notes Help system for more information on granting other users access to your Notes mail database.

Including Address sections

By default, Organizer 97 GS uses the Notes Personal Name and Address Book (NAMES.NSF), located on you local hard drive (typically in your Notes \DATA directory, for example, C:\NOTES\DATA) to store Organizer Address information. To include an additional Address section, in Notes, create an additional local Personal Name and Address Book using the PERNAMES.NTF template. Give the new Address book a different name (for example, NAMES_2.NSF), and then include the new Address book in your Organizer.

Understanding how Organizer shares sections

By default, Organizer saves your file after each change.

If the information in an included section changes in the originating file, you'll see the change in the included section of your Organizer the next time you turn to that page.

Caution When you share sections with others, you need to coordinate access times with the people who have access to your file. If two people work on the same file at the same time and both people edit the same entry, the last person's edits will overwrite those of the first person.

{button ,AL(`H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_STEPS;H_OVERVIEW_ACCESS_CONTROL_OVER;',0)} See related topics

Open File dialog box

Use the Open File dialog box to select another file you want to open or a section of which you want to include on your desktop.

Opening an Organizer file by user name

Opening an Organizer file by database name

Including sections from other Organizer files

Meeting Notices and Invitation dialog boxes

Use the Meeting Notices and Invitation dialog boxes to view and respond to invitations and reschedule notices.

Accepting an invitation

Declining an invitation

Delegating an invitation

Penciling in an invitation

Proposing a meeting change

Reading an attachment

Responding to proposed meeting changes

Processing confirmation, update, and cancellation notices

Note To delete meeting notices without processing them, click on each notice you want to delete in the Meeting Notices dialog box and then click Delete. When you delete a notice, no Organizer notice or Notes mail message is sent.

Organizer Preferences dialog box

Use the Organizer Preferences dialog box to set up Organizer preferences that will be in effect each time you start Organizer.

Changing Organizer display preferences

Changing mouse pointer preferences

Changing alarm preferences

Changing sound preferences

Changing the Organizer paths

Overview: Organizer and the Internet

In Organizer, if you have one of the supported Web browsers on your computer, you can go to the Lotus home pages on the Web without leaving Organizer. The supported browsers are Netscape Navigator and Microsoft Internet Explorer. Organizer includes Internet menu items (on the Help menu) that let you go quickly to the Lotus home page, the Lotus Customer Support home page, and the Lotus Customer Support FTP site. Organizer also includes an icon with your default set of SmartIcons that lets you go directly to the Lotus Organizer home page, and there are other Internet SmartIcons that you can add to your set of SmartIcons. For example, there's a new icon that lets you go directly to the Web page (www.lotus.com/Organizer/content) where you can download the Almanac file.

You can also embed a Lotus home page (or any other home page) on a Notepad page, providing you easy access to Internet resources and information from within Organizer. For more information about embedding an OLE object (such as a Lotus home page), see Creating a new OLE object in Notepad.

You can also create links from any Organizer entry to any Uniform Resource Locator (URL) on the Internet. For more information on creating links to the Internet, see Linking to a URL on the Internet.

Lotus home page

The Lotus home page provides a place where you can learn more about Lotus and Lotus products. From the Lotus home page you can:

- Search the Lotus Web site for topics and areas of interest to you.
- Learn what's new at Lotus, including product information, press releases, and worldwide events.
- Browse through purchasing information to help you buy Lotus products more easily.
- Go to the Lotus Customer Support home page.
- Learn more about Lotus educational services, such as educational course descriptions and schedules at Lotus Authorized Education Centers (LAEC), and certification options and exams descriptions for Certified Lotus Professional (CLP) programs.
- Learn how you can develop or market products or services based on Lotus technology as a Lotus Business Partner.
- Browse through job opportunities at Lotus.
- Go to the IBM software home page.

Lotus Customer Support home page

The Lotus Customer Support home page provides access to information about all Lotus worldwide support services.

From the Lotus Customer Support home page you can:

- Learn about all Lotus worldwide support services.
- Go to Product Support home pages for specific information about Lotus products and to ask technical questions of Lotus product support specialists.
- Browse through frequently asked questions in the Lotus Knowledge Base.
- Go to the Lotus Customer Support FTP site to receive Lotus product updates.

Lotus Customer Support FTP site

The Lotus Customer Support FTP site provides a list of products that you can upgrade.

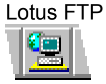
Lotus Organizer home page

The Lotus Organizer home page provides a place where you can learn more about Organizer. From the Lotus Organizer home page you can:

- View demos.
- Learn about new Organizer features.
- Download helpful Organizer files, including the Almanac file, located at www.lotus.com/Organizer/content.

{button ,AL(`H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS;H_OVERVIEW_SHARING_INFORMATION_USING_OLE_IN_NOTEPAD_OVER;H_USING_LOTUS_INTERNET_SUPPORT_STEPS;H_LINKING_TO_A_URL_ON_THE_INTERNET_STEPS',0)} See related topics

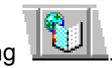
Selecting Internet Support

Command	Result
Lotus Home Page 	Goes to Lotus home page.
Lotus Support 	Goes to Lotus Customer Support home page.
Lotus FTP Site 	Goes to Lotus Customer Support FTP site.

Using Lotus Internet Support

In Organizer, if you have a Web browser on your computer, you can go to the Lotus home pages and FTP site.

1. Choose Help - Lotus Internet Support.
2. Choose the command for where to go on the Web.

Tip You can go directly to the Lotus Organizer home page by clicking .

Overview: Using TeamMail

TeamMail works with your current electronic mail system to send and receive mail messages from within Organizer. Using TeamMail you can do the following actions:

- Send a message and distribute it to one or more users.
- Send selected entries as the text of your message.
- Save a distribution list and use it to quickly send messages to frequently-used names, addresses, and mailing lists.
- Specify that you receive notification when your message is delivered.

Selecting Send options in TeamMail

Option	Result
Message only	Sends a text-only message to one or more people.
Message with selected entries as message body.	Sends a message with selected entries as contents of message to one or more people.

Selecting To options in TeamMail

Option	Result
People I select from mail directory	Selects people from the mail directory.
People from selected addresses	Selects people from specified address entries.

Sending mail using TeamMail

1. Choose File - TeamMail.
   Organizer displays the TeamMail dialog box.
2. Specify a Send option.
3. Specify a To option.
4. (Optional) Select "Don't include address in message" if you don't want address information in your message.
5. Click OK.
6. Enter your password and any other information that your e-mail system requires.
7. Click OK.
   TeamMail displays the TeamMail tabbed dialog box.

{button ,AL(`;H_OVERVIEW_USING_TEAMMAIL_OVER',0)} See related topics

Details: Printing in black and white

Keyboard shortcut
You can also press CTRL+P to select the black-and-white printing option.

{button ,AL(`H_PRINTING_IN_BLACK_AND_WHITE_ONLY_STEPS',1)} Go to procedure

Printing in black and white only

By default, Organizer prints in color if you use a color printer; however, you can print in black and white only.

1. Choose File - Print.
2. Click Options.
3. Under "Preferences," select "Print in black & white."
4. Click OK to confirm your selection.
5. Click OK.

{button ,AL(`H_PRINTING_IN_BLACK_AND_WHITE_ONLY_DETAILS',1)} See details

{button ,AL(`;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_INFORMATION_FOR_DIFFERENT_DATEBOOKS_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Printing in portrait or landscape orientation

Keyboard shortcut
You can also press CTRL+P to select the printing orientation.

{button ,AL(`H_PRINTING_IN_PORTRAIT_OR_LANDSCAPE_ORIENTATION_STEPS',1)} Go to procedure

Printing in portrait or landscape orientation

How your information is printed is determined by the orientation you select.

1. Choose File - Print.
2. Click Setup.
3. Under "Orientation," select "Portrait" or "Landscape."
4. Click OK to confirm your selection.
5. Click OK.

{button ,AL(`H_PRINTING_IN_PORTRAIT_OR_LANDSCAPE_ORIENTATION_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting double-sided printing

Keyboard shortcut
You can also press CTRL+P to select double-sided printing.

{button ,AL(`H_SELECTING_DOUBLE_SIDED_PRINT_OPTIONS_STEPS',1)} Go to procedure

Selecting double-sided print options

You can print your Organizer information on one side of your paper (single sided), or both sides of your paper (double sided). The default is single sided.

1. Choose File - Print.

2. Select "Double sided."
3. Click Options to select additional double-sided options.
4. Under "Double sided," select an option.
5. Click OK to confirm your selection.
6. Click OK.

{button ,AL(`H_SELECTING_DOUBLE_SIDED_PRINT_OPTIONS_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting printer setup options

Keyboard shortcut
You can also press CTRL+P to select printer setup options.

{button ,AL(`H_SELECTING_PRINTER_SETUP_OPTIONS_STEPS',1)} Go to procedure

Selecting printer setup options

You can change various printer setup options. The options available to you are specific to the printer drivers installed on your system, and differ from printer to printer.

1. Choose File - Print.

2. Click Setup.

   To display Help for an option in this dialog box, click the ?, in the top right corner of the dialog box, then click the option. You can also refer to your printer documentation for more information on your printer.

See details

3. Click OK until you exit all the Setup dialog boxes.
4. Click OK.

{button ,AL(`H_SELECTING_PRINTER_SETUP_OPTIONS_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Selecting the number of copies to print

By default, Organizer prints one copy of any section that you select for printing. You can print up to 99 copies of what you're printing in a single printing.

1. Choose File - Print.
2. For "Copies," select the number of copies you want to print.
3. Click OK.

{button ,AL(`H_SELECTING_THE_NUMBER_OF_COPIES_TO_PRINT_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting the number of copies to print

Keyboard shortcut
You can also press CTRL+P to change the number of copies.

Selecting the number of copies
Click + (plus) to increase or - (minus) to decrease the number of copies. You can also highlight the number in the "Copies" box and then enter another number for the copies you want.

{button ,AL(`H_SELECTING_THE_NUMBER_OF_COPIES_YOU_WANT_TO_PRINT_STEPS',1)} Go to procedure

Details: Selecting what order to print your information in

Keyboard shortcut
You can also press CTRL+P to select the order in which to print your information.

{button ,AL(`H_SELECTING_WHAT_ORDER_TO_PRINT_YOUR_INFORMATION_IN_STEPS',1)} Go to procedure

Selecting what order to print your information in

Organizer prints section information first across and then down for paper types that include multiple rows and columns, such as labels. You can change the print order so that Organizer prints section information down, then across.

1. Choose File - Print.

2. Click Options.
3. Under Print order, select an option.
4. Click OK to confirm your selection.
5. Click OK.

{button ,AL(`H_SELECTING_WHAT_ORDER_TO_PRINT_YOUR_INFORMATION_IN_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting whether to skip blank entries

Keyboard shortcut
You can also press CTRL+P to select whether or not to skip blank entries.

{button ,AL(`H_SELECTING_WHETHER_TO_SKIP_BLANK_PAGES_STEPS',1)} Go to procedure

Selecting whether to skip blank entries

By default, Organizer includes blank entries (or spaces or pages) where they exist in Organizer sections. You can change it so that Organizer doesn't print blank entries.

1. Choose File - Print.
2. Click Options.
3. Under "Preferences," select "Skip blank entries."
4. Click OK to confirm your selection.
5. Click OK.

{button ,AL(`H_SELECTING_WHETHER_TO_SKIP_BLANK_PAGES_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting a printer

Selecting a printer in other ways
You can also choose File - Print and click Setup to select a printer.

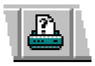
Selecting a specific printer
Organizer lists only installed printers. To add additional printers, you must install them in Windows.

{button ,AL(`H_SELECTING_A_PRINTER_STEPS',1)} Go to procedure

Selecting a printer

Organizer uses the default printer specified in the Printers folder in the Windows Control Panel unless you select another printer. The printer that you select determines which fonts are available when you print.

1. Choose File - User Setup - Printer Setup.



2. Under "Printer," click the "Name" box and select a printer.

   See details

   Note The remaining options in this dialog box depend on the type of printer you've selected. Although the options include selecting a paper size and orientation, the paper size and orientation that you select in the Layouts dialog box take precedence over the settings in this dialog box.

3. Click OK.

Organizer uses the printer you select for the remainder of the current session.

{button ,AL(`H_SELECTING_A_PRINTER_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',0)} See related topics

Selecting options for double-sided printing

Option	Result
Full page	Prints on two sides of a regular (non-perforated) sheet of paper (default).
Perforated paper	Prints the pages sequentially on perforated paper.

Details: Selecting printing options

Printing in color or in black and white
By default, Organizer prints in color if you use a color printer. To print in black and white on a color printer, select "Print in black & white."

Setting the print order
For paper types that include multiple rows and columns, such as labels, Organizer prints information across the first row, then across the next row, and so on. You can change the order so that information prints down the first column, then down the next column, and so on.

The Print order options are available only when both the selected layout and paper type have multiple rows and columns.

Specifying label options
You can print up to 1,000 copies of each label in a single printing. For example, if you need 25 labels for the same address, you would select the address, select a label layout, then specify 25 copies to print. You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number of labels to print.

If you are printing labels in a multiple row or column format, you can also enter a number that corresponds to the position of the first label on the first page. This is particularly useful if you have a partially used label sheet. Rather than waste the partial sheet, specify the position of the first remaining label as the location at which to begin printing.

Tip Make sure to check the selected Print order when you're counting the used labels to determine the position of the first remaining label; that is, count either across then down or down then across.

The "Labels" options are available only for label paper types.

Specifying double-sided printing
The double-sided printing options are available only if you selected "Double sided" in the Print dialog box.

{button ,AL(`H_SELECTING_PRINTING_OPTIONS_STEPS',1)} Go to procedure

Selecting printing options

1. Choose File - Print.
2. Click Options.
3. Select the preferences you want.

   See details
4. Under "Print order," select the order in which you want Organizer to print pages with multiple columns or rows.

   See details
5. Under "Labels," enter the number of times to print each label and a starting label number.

   See details
6. Under "Double sided," select whether you want Organizer to print double-sided information for regular paper or perforated paper.

   See details
7. Click OK.

{button ,AL(`H_SELECTING_PRINTING_OPTIONS_DETAILS',1)} See details

{button ,AL(`H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;',0)} See related topics

Selecting printing preferences

Option	Result
Skip blank entries	Prints (default) or doesn't print entries and pages that don't contain information.
Print in black & white	Prints in color (default) or prints in black and white only.

Selecting the print order

Option	Result
Across then down	Prints information in multiple rows or columns from left to right, and then from top to bottom (default).
Down then across	Prints information in multiple rows or columns from top to bottom, and then from left to right.

Selecting a single entry

1. Go to the entry you want to select.
2. Click the entry to select it.

{button ,AL(`;H_COPYING_A_SINGLE_ENTRY_STEPS;H_MOVING_A_SINGLE_ENTRY_STEPS',0)} See related topics

Details: Selecting multiple entries

Keyboard shortcuts
To select multiple entries that are in sequence, select the first entry, then hold down SHIFT while you press , ↓, →, or ←.

{button ,AL(`H_SELECTING_MULTIPLE_ENTRIES_STEPS',1)} Go to procedure

Selecting multiple entries

You can select multiple entries that are and aren't in sequence.

1. Go to the first of the multiple entries you want to select.
2. Select the entry.

- If the multiple entries you're selecting are in sequence: move to the last entry, hold down SHIFT, and click the last entry.
- If the multiple entries you're selecting are not in sequence: move to each entry, hold down CTRL, and click the entry.

Note When you have selected your multiple entries, you can perform the same operation with them as you can with selected single entries, such as deleting, reordering, and so on.

{button ,AL(`H_SELECTING_MULTIPLE_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_COPYING_MULTIPLE_ENTRIES_STEPS;H_MOVING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Toolbox icons list

The Toolbox icons are on the left side of the screen. Toolbox icons provide extra tools for performing Organizer operations and for automating tasks.

Unlike SmartIcons, you can drag and drop entries to Toolbox icons -- for example, to dial a number of an entry, you can drag and drop the entry to and if you are set up on a modem, Organizer will call the number.

A special set of Toolbox icons appears below the Time and Date icons. These icons, called the View icons, change depending on what Organizer section is open. These icons let you display the information -- in each section -- in different formats.

Icon	Function
	Focus, select, and drag and drop entries.
	Pick up and drop entries between pages.
	Create a link.
	Break a link.
	To copy an entry, drag and drop it to Clipboard; to paste an entry, drag and drop it off Clipboard.
	Create an appointment.
	Create a task.
	Create an Address record.
	Create a call.
	Create a page.
	Create an event.
	Create an anniversary.
	View meeting notices.
	Send or receive mail.
	Make or log a phone call.
	Print information.
	In Calendar, view a day per page.
	In Calendar, view one work week per two pages.
	In Calendar, view a full week per page.
	In Calendar, view a month per two pages.
	In To Do, sort tasks by priority.
	In To Do, sort tasks by status.
	In Calls, sort calls by last name.
	In Calls, sort calls by company name.
	In Planner, view a year per page.
	In Planner, view a quarter per page.

In Address, display all information in Address records.

In Address, display name, job title, company name, address, phone number, and fax number in Address records.

In Address, display name, job title, phone number, fax number, and e-mail address in Address records.

In Address, display name and phone number in Address records.

In Notepad, sort pages by page number.

In Notepad, sort pages alphabetically by title.

In Anniversary, sort anniversaries by year.

In Anniversary, sort anniversaries by month.

In Anniversary, sort anniversaries by zodiac sign.

In To Do, Calls, Notepad , or Anniversary, sort by category.

In To Do, Calls, or Notepad, sort by date.

Troubleshooting group scheduling

The following are troubleshooting tips about group scheduling.

What do I do if I don't have the Meeting notices icon  in Toolbox?
If the Meeting notices icon isn't visible in Toolbox and you have Notes 4.51 installed on your system, you need to speak with your system administrator or consult your Organizer installation documentation. You may have installed the PIM only version of Organizer 97 GS rather than the PIM with Group Scheduling version.

Note An error in your login name may cause this problem. If you recently changed your name, or you're logging in to Notes and Organizer with different names, make sure to tell your system administrator.

Can others see my schedule?
Yes, however you can control who has access to your calendar information using the Notes Calendar Profile and Delegation Profile.

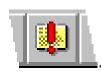
You specify the users who can view your free time while scheduling meetings in the Notes Calendar Profile. The default is to let all users view free time.

You can use the Notes Delegation Profile to allow other users to read or manage your calendar in Organizer. If you select "Everyone can read my Calendar" in the Delegation Profile, other users can add your Calendar section to an Organizer binder or display your calendar in multiple calendar view, but cannot make appointments for you or respond to meeting invitations. If you select "Everyone can manage my Calendar," other users can view your calendar and also make appointments, schedule meetings, and respond to meeting invitations for you. You can also specify only certain users who can read or manage your calendar.

To display the Notes Calendar Profile, select your Mail database and choose Actions - Calendar Tools - Calendar Profile. To display the Delegation Profile, display the Calendar Profile and click "Allow other users to view your calendar."

See the Notes Help system for more information on granting other users access to your Notes Mail database.

How can I quickly check who's coming to a meeting I scheduled?

Select the meeting in your Calendar, and then click the Meeting status icon . If you don't have the Meeting status icon in your icon bar, see Adding an icon to the default palette.

I want to check on the free time of a meeting attendee, but the bar for the attendee on the Free time tab appears dimmed. What can I do?
If the time bar for an attendee is dimmed, either that person's Notes Mail server is temporarily unavailable, that person has chosen not to give access to their free time schedule, or that person hasn't set up a Notes Calendar Profile. You can wait and try to schedule the meeting at a future time when the server might be available, or you can contact the person to make sure they have created a Calendar Profile and included you in the list of people able to view their free time.

I installed Organizer with Group Scheduling. I started Organizer, and when requested, entered my password for the Lotus Notes ID. The following message appeared: "A Notes error occurred. Your ID has not been certified to access the server."   Why did I get this message?
You may not have the correct mail file path or Home Server or Home Domain names in the Notes Location document that you're using. Make sure that the Home Server and the Home Domain names are correct. Your system administrator will know this information.

To change the Home Server and Domain names in Notes:

1. Close Organizer.
2. Start Notes.
3. Choose File - Mobile - Edit Current Location.
4. Under Servers, for "Home/mail server," enter the name of your mail server.
5. Under Mail, for "Mail file location," select "On server."
6. For "Mail file," enter the path to your mail file.
7. For "Mail domain," enter the mail file's domain.
8. Choose File - Save to save the location document.
9. Restart Organizer.

When you start Organizer, you should be able to use group scheduling.

I opened my mail file on the server and configured it for Organizer 97 GS. I did the same for a local replica of my mail file. I replicated my local replica with my mail file on the server after I configured each version separately. Now when I open either my replica or server version of my mail file in Organizer 97 GS, I see duplicate tabs for each section in my file. How can I remove the extra set of tabs?

To avoid duplicate sets of tabs for each Organizer section when you upgrade your mail file in Organizer, upgrade either the replica version or the server version of your mail file (not both), and then replicate your changes.

To remove the extra set of tabs, perform the following steps:

1. In Notes, open your mail file on the server.
2. Change to the "All documents" view.
3. Delete all of the "Do not delete Organizer note - Organizer Database SetupComplete" documents.
4. Start Organizer 97 GS and open the server version of your mail file.
5. When prompted, click Yes to configure your mail file for Organizer 97 GS.
6. Replicate your changes to your local replica.

This configures your replica with one set of tabs for each section.

Troubleshooting tips for Organizer sections

The following troubleshooting tips are about how to manage your information and how to perform tasks in all Organizer sections.

Address

I recreated my Personal Name and Address Book (NAMES.NSF) in Notes. Now when I start Organizer and click the Address section tab, there's a message that says that something might be wrong with the file where the section was included from. What can I do?
You can remove the section and then re-include it. See Removing a section and Including sections from other Organizer files .

Anniversary

Can I set up a repeating anniversary for something that doesn't occur on the same day every year, such as a birthday that occurs on Leap Year?
Yes. See Details: Creating an Anniversary for that information.

Calendar

I manage my boss's calendar. Is there a way to look at my boss's Calendar section and my Calendar section without having to open two files?
Yes, you can include your boss's Calendar section in your Organizer file. See Including sections from other Organizer files.

Calls

In Calls, I tried to create an entry by selecting the name I wanted from the "Last name" box in the Create Call dialog box. The name I wanted wasn't in the list. I know I entered it. Why doesn't it appear in my list?
Organizer displays information in the "Last name" box from the first Address section in your Organizer book. If you created multiple Address sections in your notebook, Organizer goes to the first Address section that appears in your notebook.

To Do

Why aren't my To Do tasks being updated?
You update Organizer To Do tasks by running a Notes agent in your mail file. You can update your tasks from Notes manually, or you can set up the agent so that your tasks are updated automatically. See Updating and checking the status of To Do tasks.

General questions

I tried to import an ASCII text file into my Organizer Address section. When I went to map the fields, only one field was listed as an option. I know my file had many fields. Why did this happen and what can I do?
Your ASCII text file contains a blank line at the top of the file, or you're trying to import a fixed-length ASCII text file.

If your file contains a blank line at the top, open the file in a text editor, such as Windows Notepad or the DOS Editor, and remove the blank line from the top of the file.

If your file has a fixed length, convert it to Delimited ASCII file format to import it to Organizer.

I created an alarm in Organizer to go off in five minutes and then switched to Notes to do some work. The alarm never went off. Why did this happen?
Organizer and Notes *poll*, or check for alarms and other information, on different schedules. Organizer polls every minute and displays any alarms. Notes polls every ten minutes, collects alarms set for the next ten minutes, and then displays the alarms one by one. If you create a short-term alarm in Organizer and then switch to Notes, your alarm may occasionally fall between a Notes polling interval and not go off. This will not happen if you remain in Organizer.

You can change the Notes polling interval if you frequently encounter this problem. To do so, open the Notes.ini file in any text editor. Then find the "AlarmCheckFrequency" entry and change to a shorter polling interval, for example, from "AlarmCheckFrequency=10" to "AlarmCheckFrequency=1." (If there is no "AlarmCheckFrequency" entry in your Notes.ini file, you may have to create one.)

I set up my modem under Windows 95, but I can't make a telephone call from Organizer. What can I do?
If you can't make telephone calls from Organizer, and your modem is already set up, you can verify that the dialing

properties for the location you're dialing from, and the configuration of the modem you're using, are set up correctly. To check the dialing properties and the configuration of your modem, see Selecting a dialing from location and configuring your modem. Have your modem documentation nearby while you check these settings.

You can verify the COM port settings in the Windows 95 Control Panel. Go to the Windows 95 taskbar, click Start, choose Settings, and then choose Control Panel. Double-click the Modem icon. Click the Diagnostics tab and check the COM port settings for your modem. Under "Modems", you can also verify the dialing properties and modem configuration in the Windows 95 Control Panel.

Who can I call to order printed documentation for Organizer 97?
Call Lotus Customer Service and Information. In the U.S., call (800) 343-5414; in Canada, call (800) GO-LOTUS (800) 465-6887.

Troubleshooting printing

The following are troubleshooting tips about printing.

In my Calendar section, I have show-through entries from other sections. Can I print these show-through entries when I print the Calendar information?

When printing the Calendar section you can select one of the following layouts to print both appointments and show-through entries.

- The Monthly Calendar layout prints a month.
- The Daily Page layout prints a day per page.
- The Weekly 2-Page layout prints an entire week on two pages.

I want to print a weekly view of my appointments, but I don't see that print option. What should I use?

Use the Weekly 2-Page, Weekly Timeline, or Weekly Work Timeline layout. These layouts print the week and show what time is booked and what time is available for the week.

When I print a home Address record, only the name prints. The rest of the Address record doesn't print. What can I do to fix this?

You need to change the Preference option that tells Organizer to print only the first line of each entry. See Customizing layouts.

Details: Undoing your last action

Keyboard shortcuts
You can also press CTRL+Z to undo your last action.

Caution You can't undo the deletion of included sections, repeating appointments, categories, cost codes, or customer codes. If you delete multiple Notepad pages and then undo the deletion, only the first page you selected in the group of deleted pages is re-entered in your Notepad section.

{button ,AL(`H_UNDOING_YOUR_LAST_ACTION_STEPS',1)} Go to procedure

Undoing your last action

Many actions in Organizer can be undone. The Undo feature affects only the last action you performed.

To undo your last action, choose Edit - Undo.

Note When the Undo command is dimmed, you can't undo your last action.

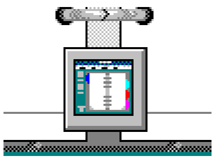
{button ,AL(`H_UNDOING_YOUR_LAST_ACTION_DETAILS',1)} See details

Details: Using Clean Screen

Keyboard Shortcuts
You can clear or redisplay Windows controls by pressing F11. You can also press ALT+V and deselect Show Clean Screen to redisplay the Windows controls.

With a clean 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.

Clearing the screen in other ways
You can also clear Windows controls by right-clicking and then deselecting Show Clean Screen. To redisplay Windows controls, click



{button ,AL(`H_USING_CLEAN_SCREEN_STEPS',1)} Go to procedure

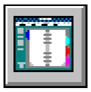
Using Clean Screen

Clean Screen gives you a quick way to maximize your Organizer desktop by hiding the Windows controls from the screen. When you use Clean Screen, Organizer removes the title bar, menu, SmartIcons, and vertical and horizontal scroll bars so that you have the whole screen in which to view and edit your Organizer desktop.

1. Choose View - Show Clean Screen.

   See details

   The Clean Screen icon appears in the center of the screen.



2. Click this icon to redisplay the Windows controls.
3. (Optional) You can drag the icon to change its location on the screen.

{button ,AL(`H_USING_CLEAN_SCREEN_DETAILS',1)} See details

Overview: Using Help to learn about Organizer

The Organizer Help system offers comprehensive information about Organizer features. The steps below can help you get oriented to Organizer and begin to use its many powerful features. Cross-references to Help topics appear in green; click a cross-reference to go to that Help topic. For a complete guide to using Organizer Help, see Overview: Using Help.

See The Organizer Workspace to familiarize yourself with the Organizer desktop and work area. You can click any area of the screen to see a pop-up description of the area.

Organizer Help includes a number of topics that give an overview of Organizer features. Reading through the following overview topics is a great way to learn about Organizer features and get ideas on how to make Organizer work for you.

- Overview: Calendar section
- Overview: Planner section
- Overview: Address section
- Overview: Notepad section
- Overview: To Do section
- Overview: Calls section
- Overview: Anniversary section
- Overview: Filters
- Overview: Creating a cost code
- Overview: Categories
- Overview: Sharing your files
- Overview: Using Organizer on a notebook computer
- Overview: SmartIcons

Read the following topics to see steps on how to use important Organizer features:

- Starting Organizer
- Opening an Organizer file by user name
- Opening an Organizer file by database name
- Moving between sections
- Creating an entry
- Using time tracker
- Scheduling a meeting
- Ways to Respond to Meeting Invitations
- Dialing a number
- Displaying entries in more than one section
- Creating links
- Printing information in any Organizer section
- Ending Organizer

The following topics contain tables with information on ways to use the mouse and keyboard to perform Organizer tasks:

- Organizer mouse pointer shapes
- Mouse shortcuts
- Keyboard shortcuts
- Editing keys
- Toolbox icons list
- Shortcut menus

If you encounter a software problem you can't solve, return to Help Topics dialog box, click the Contents tab, and select Troubleshooting, and then select Contacting Customer Support or Lotus Customer Support for information on contacting Customer support.

Page dialog box

Use the Page dialog box to set style attributes for Notepad pages.

Linking Notepad pages

Folding Notepad pages

Assigning color to Notepad pages

Customize dialog box

Use the Customize dialog box to customize sections, for example, to add, remove, or rename sections, include sections from other Organizer files, to change the color and texture of the binder, change the name and appearance of section tabs, place pictures on section-tab pages, change the font size, and open to specific sections in Organizer.

Adding a section

Removing a section

Including sections from other Organizer files

Changing the appearance of your binder

Changing the order of sections

Changing the name of a section

Changing the size or width of section tabs

Changing the color of a section tab

Placing a picture on a section-tab page

Changing the font size for all Organizer sections

Opening your binder to a section

Categories dialog box

Use the Categories dialog box to create, rename, or delete categories.

Overview: Categories

Creating a new category

Assigning a category to an entry

Renaming a category

Deleting a category

Displaying categories with entries

Displaying entries in a particular category

Cost Codes dialog box

Use the Cost Codes dialog box to create, rename, or delete cost codes.

Overview: Creating a cost code

Creating a customer code and cost code

Assigning a customer code and cost code to an entry

Renaming a customer code and cost code

Displaying customer code and cost codes with entries

Deleting a customer code and cost code for an entry

Filters dialog box

Use the Filters dialog box to create, edit, copy, apply, clear, or delete filters.

Overview: Filters

Creating a filter

Editing a filter

Copying a filter

Applying a filter

Clearing a filter

Removing a filter

SmartIcons Setup dialog box

Use the SmartIcons Setup dialog box to customize a set of SmartIcons and to edit individual icons.

Adding an icon to the default set of SmartIcons

Changing the set of SmartIcons you want to display

Editing an existing icon

Changing the size of an icon

Creating a set of SmartIcons

Deleting a set of SmartIcons

Attaching a script to an icon