Lotus Organizer 97 GS
Readme.wri

This file contains information that isn't included in the printed or online Help documentation.

This file contains information on the following topics:
- What's New in Organizer 97 GS
- Extra Content on the CD and/or the World Wide Web (the Web)
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For information about upgrading Organizer 97 files to Notes mail files, see *Administrator's Guide*.

What's New in Organizer 97 GS

Organizer 97 GS has two feature sets -- PIM-only or PIM with group scheduling. You choose which feature set you want to use during installation.

PIM-only

Organizer 97 GS includes the following PIM enhancements:
- 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, and the "Display timeslots for Day per page view" option must be selected.
- Organizer links to Internet sites. You can create a link to launch any Web page.
- A new icon available in your set of SmartIcons that lets you start 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 takes you directly to the Web page (www.lotus.com/Organizer/content) where you can download the updated and expanded Almanac file. Among other things, in this Almanac file you can get information like specific dates for holidays, and specific information regarding time zones, telephone area codes, important 800 telephone numbers, travel tips, time management information, and more.
- An easy way to view your To Do tasks, Calls entries, Planner events, and Anniversary entries in Calendar. Your entries in the To Do, Calls, Planner, and Anniversary sections are now shown through into the Calendar section by default.
- An easy conversion process of Organizer 2.x and 3.x files to Organizer 97 GS files.
- Support for the Versit standards for electronic business cards and appointments. For example, you can drag a vCard object into Organizer and add it to your Address section without having to retype the information, or drag a vCalendar event from a Web site into Organizer to automatically create a new appointment.
- All of the new features available in Organizer 97, such as time slots in the Day per Page view, support for the Telephony API (TAPI) autodialer, rich text formatting in the Notepad, and support for OLE in the Notepad section.

PIM with group scheduling

The group-scheduling component of Organizer 97 GS now incorporates Notes 4.5 as the system that carries messages. All entries (except your Address records) are stored in your Notes 4.5 mail file (.NSF). Addresses are added to your local Address Book. Organizer 97 GS also uses the Notes 4.5 Free-Time database and the Resource Reservation database to help you use group scheduling when setting up a meeting or coordinating resources. If you're upgrading from Organizer 2.11, note that Organizer 97 GS doesn't use Lotus Organizer Scheduling Agent 2.1; rather, Organizer 97 GS uses Notes 4.5 to handle scheduling tasks.

Organizer 97 GS includes the following group-scheduling enhancements, which are available if you install PIM with group scheduling:
- Seamless group scheduling interoperability with Notes 4.5 group scheduling users
- For Organizer 2.11 interoperability, DLLs to convert scheduling messages between Organizer 97 GS and Organizer 2.11 and a Notes server add-in task that lets Organizer 97 GS users view available free-time for Organizer 2.11 users

- An Organizer Tour that gives you an overview of the new group scheduling features

All PIM enhancements are available with PIM with group scheduling as well.

Extra Content on the CD and/or the World Wide Web (the Web)
This section describes additional features available on the Organizer 97 GS CD-ROM and/or from the Organizer home page on the Web.

Administrator's Guide
Administrator's Guide (ADMIN.RTF) contains important information for adminstrators about upgrading Organizer group scheduling files (.OR2) to Notes mail files (.NSF), enabling scheduling with Organizer 2.11, and setting up other tools to enhance group scheduling. You can review *Administrator's Guide* if you're a system administrator for current upgrading information. To open *Administrator's Guide*, place the CD in your drive. Click the Windows Start button and choose Run. Type **D:\ADMGUIDE.RTF** in the box.

Organizer 97 GS Migration utility
The Organizer 97 GS Migration utility runs on a Notes server. This utility converts Organizer group scheduling files (.OR2) to Notes mail files (.NSF). To install the Organizer 97 GS Migration utility, place the CD in your drive. Click the Windows Start button and choose Run. Type **D:\EXTRA\MIGRATE\ORGMIGRT.EXE** in the box.

Free-Time Plug-in
Free-Time Plug-in is a Notes 4.5 add-in task that lets Organizer 97 GS users see the free time of Organizer 2.11 users. Free-Time Plug-in works for Organizer 2.11 users who use either cc:Mail or Notes. See *Administrator's Guide* for more information about how to install Free-Time Plug-in.

cc:Mail MTA conversion DLL (ORSCONV.DLL)
cc:Mail MTA v1.1 exchanges messages and directory information between Notes and cc:Mail users. cc:Mail MTA conversion DLL exchanges scheduling information between Organizer 97 GS users and cc:Mail users with Organizer 2.11. In Organizer 2.11, cc:Mail users sent a meeting notice as an email with an ORS attachment listing all invitees and information about the meeting. In Organizer 97 GS, a meeting invitation is sent as a Notes Meeting Notice Form. When users of these different Organizer versions want to exchange meeting notices, the c:Mail MTA conversion DLL translates the format of the meeting notice to the proper format required for the receiving program.

Note Organizer 2.11 users with Notes mail-based scheduling can exchange meeting notices with Organizer 97 GS users as e-mail only. Users of both products must convert the e-mail to an appointment after it's received. See *Administrator's Guide* for more information about how to install cc:Mail MTA Conversion DLL.

cc:Mail MTA conversion DLL doesn't determine a cc:Mail or Organizer 97 GS user's availability for a meeting; it only converts the scheduling information between the two products. In other words, cc:Mail MTA conversion DLL doesn't check a user's free time when sending meeting notices. To do that, you must also have Free-Time Plug-in installed. (For more information, see "Free-Time Plug-in," earlier in this file.)

Organizer Web Calendar
Organizer Web Calendar lets remote Internet and corporate intranet users share and manage Organizer calendars and tasks using standard Web browsers. With Organizer Web Calendar, you can do the following tasks:
- View, edit, delete, and create Organizer appointments and tasks securely over the Web.
- Share your calendar and corporate events with important customers, business partners, and mobile users.
- Review your calendar from anywhere in the world by using any computer running Netscape Navigator or Microsoft Internet Explorer.
- Manage your team's calendars. An assistant can update anyone on the team's schedules, so anyone can view and edit up-to-the minute changes in each other's calendars and tasks even while on the road.
- Secure your information with three levels of security. Ensure that only those with the correct password have access to your calendar. Create passwords for "read only" access or for edit capabilities.
- Get a detailed look at your calendar in a daily view, or get the big picture with the weekly or monthly views.
- View your multiple-day events, anniversaries, and phone call reminders.

Once Organizer 97 GS and Organizer Web Calendar are installed on a Web server, the administrator can let users know the home page where they can access their Organizer files. Remote users can access existing Organizer files stored on a

file server using Netscape Navigator or Microsoft Internet Explorer. In addition, administrators can configure and monitor user access using the Organizer Web Calendar Administration program.

To install Organizer Web Calendar, place the CD in your drive. Click the Windows Start button and choose Run. Type **D:\EXTRA\ORGWEB\ORGWEB.EXE** in the box.

vCalendar and vCard support
Lotus Organizer 97 GS supports the Versit standards for electronic business cards and appointments. For example, you can drag a vCard object into Organizer and add it to your Address section without having to retype the information, or drag a vCalendar event from a Web site into Organizer to automatically create a new appointment. You use vCalendar and vCard in conjunction with your browser with a helper application. You can download a helper application from: http://www.imc.org

Acrobat files
The Organizer 97 GS CD version also includes most of the printed documentation that can be read online. This online documentation includes *Exploring Organizer* and *Print Layout Guide* which you view by using Adobe Acrobat Reader. To install this Organizer online documentation, place the CD in your drive. Click the Windows Start button and choose Run. Type **D:\ACROREAD\INSTALL** in the box.

Almanac (Web only)
You can download an updated and expanded Almanac file (ALMANAC.OR4 for PIM users and ALMANAC.NSF and FODORS.NSF for group-scheduling users) from our Web site at www.lotus.com/Organizer/content. In the Almanac file you can get information like specific dates and specific information regarding holidays, time zones, telephone area codes, important 800 telephone numbers, travel tips, time management information, and more.

Personal Data Assistant (PDA) support
Organizer 97 GS PIM offers support for US Robotics PalmPilot. You can synchronize information between your Organizer file and your PalmPilot to keep both files up to date. To install PalmPilot support, place the CD in your drive. Click the Windows Start button and choose Run. Type **D:\EXTRA\PALM\DISK1\SETUP.EXE** in the box.

General Installation
See *Exploring Organizer* for installation guidelines.

Installing the Tour
The Organizer default installation doesn't include the Tour. If you want to install the guided overview Tour, you need to customize the installation. Or you could run the default installation initially, and at a later time add the Tour.

If you have the CD-ROM, you can view the Tour without installing it. Place the CD in your drive, and choose Help - Tour.

Multilingual Installation
You can install copies of Organizer 97 GS in multiple languages. This capability is part of the Lotus strategy for multilingual computing.

To add an additional language version of Organizer 97 GS, you must install Organizer again. Install will tell you that you've copied the Organizer application in a different language than the one you want to install and that during installation, the folder structure used with your default language version will be preserved.

When you install different language versions of Organizer, Install creates a Start menu icon for each language installed. For each language installed after the default language, the Start menu icon name will include a 2-character International Standards Organization (ISO) tag to identify the language. If English is the default language, for example, then the Organizer English application will be identified as "Lotus Organizer 97 GS," and the Spanish application will be identified as "Lotus Organizer 97 GS ES."

As you add additional language versions of Organizer 97 GS, the Install program populates the Start menu with icons for the additional languages. For example, the icon for the German version of Organizer 97 GS is labeled "Lotus Organizer 97 GS DE."

If you're installing different language versions of Organizer on a server, see Section 14 of the READNET.TXT file for important information on installation exectuables.

Information for SmartSuite Users

Protecting files with passwords in Organizer 97 GS (.OR4)
You can set a password for your Organizer 97 GS (.OR4) file so that others can view or change your schedule, names and addresses, and other information. When your file is password-protected, SmartCenter 97 prompts you for the password when you first open the Calendar and Address drawers, and when you change or add information to any files in these.

In Organizer, you can select and then set one of the following three types of access (rights) for a file: Owner, Assistant, and Reader. You assign a certain password to the particular access right. For example, if you use "carrots" as a password for Reader access, you can give this password (carrots) to users *you* want to have Reader access to your file.

If you mistype your password, SmartCenter 97 displays a blank copy of your Calendar or Address drawer. To restore these drawers, simply close and then reopen the drawer.

You may want to turn off the password protection for your local copy of your Calendar and Address sections, so that you aren't prompted for a password each time you change information.

Using SmartCenter Calendar and Address drawers with Organizer 97 GS PIM (.OR4) files
You can continue using SmartCenter Calendar and Address drawers if you're upgrading to Organizer 97 GS PIM (.OR4), but not with Organizer 97 GS with group scheduling (.NSF). If you're using Organizer 97 GS with group scheduling (.NSF), your Calendar and Address information is stored in your Notes mail file and your Personal Name and Address book, respectively. You can't use SmartCenter to edit Calendar appointments and Address records stored in .NSF files.

To use SmartCenter Calendar and Address drawers with your .OR4 file, perform the following steps.

1. Convert your Organizer 2.x or Organizer 97 (.OR3) file to Organizer 97 GS PIM (.OR4).
   Note See *Exploring Organizer* for more information on converting an Organizer file from a previous   release.
2. In SmartCenter, click Calendar.
3. Right-click the Calendar tab.
   Note If you're configuring your Address tab, right-click the Address tab.
4. Choose "Folder Properties."
5. Click "File type" and select "Lotus Organizer File."
6. For "Name of Lotus Organizer File," enter the name of your newly converted .OR4 file.
If necessary, click Browse to select from a list of files, and click Open.
   Note To see newly converted .OR4 files, click "Files of type" and select "All files (*.*)."
7. Click OK.
8. Repeat steps 2 -7 to configure the Address drawer.

Miscellaneous Information

Customer Support telephone numbers
The following complimentary Customer Support telephone numbers are corrections to the ones listed in online Help:

- Netherlands   +31-20-4874523
- Belgium   +32-2-7143129
- Italy   +39-2-69633206
- Spain   +34-1-3778115

Troubleshooting Tips

If you encounter any of the scenarios below, you can use the accompanying solutions.

> General

Tip   You're converting an Organizer 2.x or Organizer 97 (.OR3) file to an Organizer 97 GS file, and you've customized the section names in the Organizer 2.x or Organizer 97 (.OR3) file. (For example, you renamed Calendar to My Cal.) Before you convert the Organizer 2.x or Organizer 97 (.OR3) file to an Organizer 97 GS file, do one of the following:

- Rename the sections in the Organizer 2.x or Organizer 97 (.OR3) file to the default section name. For example, if you renamed Calendar to My Cal, change the name back to Calendar before you convert the Organizer 2.x or Organizer 97 (.OR3) file.
- Upgrade your mail file, rename the scetions to match the customized names you use in the Organizer 2.x or Organizer 97 (.OR3) file, and then convert the Organizer 2.x or Organizer 97 (.OR3) file.

Scenario You chose Hide SmartIcons and want to re-display them.
Solution Right-click inside the Organizer binder and choose Show SmartIcons.

Scenario An error message notifies you that you've run out of resources if you're running Lotus Notes with Organizer 97 GS and another program.
Solution Close the other program.

Scenario You converted an Organizer PIM-only (.OR4) file to an Organizer group-scheduling (.NSF) file. You file no longer includes the preferences you set in your original Organizer PIM-only (.OR4) file, such as tab colors or pictures added to the front or back of your binder.
Solution You need to reset your user preferences after you convert your .OR4 file to an .NSF file.

Scenario You're converting an Organizer 2.x or Organizer 97 (.OR3) file to an Organizer 97 GS file, and you see an error message indicating that you don't have sufficient disk space to save the file you're converting, and to delete some files and try again.
Solution Because Organizer 97 GS files contain additonal features, converted Organizer 2.x or Organizer 97 (.OR3) files will be larger. You can delete files you no longer need to create extra disk space for this new group-scheduling file.

Scenario You tried to create a new Organizer PIM-only (.OR4) file after deleting the C:\TEMP folder.
Solution Don't delete the C:\TEMP folder; you won't be able to create a new Organizer PIM-only (.OR4) file if you do. If you've deleted the C:\TEMP folder, create a new C:\TEMP folder.

Scenario You've converted an Organizer 2.x or Organizer 97 (.OR3) file after upgrading your mail file for Organizer 97 GS with group scheduling (.NSF). When you start Organizer, you get an error message telling you that the converted file can't be found.
Solution You can open the file manually.

> Address

Scenario Organizer 97 GS removes the leading zeros when you import information from a text (.TXT) file or a Comma Separated Values (.CSV) file into the Address section. As a result, any zip codes that begin with a zero lose the leading zero. For example, if you add the zip code 02142, only 2142 appears.
Solution Add a space before the leading zero to show the leading zero, for example, to see 02142 rather than 2412.

> Notepad

Scenario The OLE object menu isn't cleared when you exit in-place editing. (Changing to another Notepad page or going to another section doesn't clear the object.)
Solution Click on the OLE object and then click on the page title.

Scenario When you finish editing an object, you press ESC to exit editing, and you get unpredictable results.
Solution To exit in-place editing of an object, don't use ESC, but use any of the following methods:

- Click outside of the object in the Notepad page.
- Click in the title of the Notepad page.
- Choose Section -Turn To and select an Organizer section.

- Click an Organizer tab.

Scenario Clicking an OLE object doesn't enable its top-level context-sensitive menu.
Solution Right-click the object, and the object's top-level menu is available.

Scenario You want to use the horizontal scroll bar to view your OLE object.
Solution Choose Text - Word Wrap to turn on the scroll bar to view large OLE objects.

Scenario You've updated a linked external file, but after seeing the link update indicator in Organizer for that OLE link, the updates aren't visible in the Notepad page.
Solution Click the page containing the link in order to see the updates.

Scenario You can't place the cursor above or below an OLE object on a Notepad page.
Solution Press CTRL+HOME or CTRL+END and then press ENTER.

> Printing

Tip Before you print labels, you may want to print the labels on a standard paper size (for example, 8 1/2 x 11" or A4) and then compare the printed output to the label layout you want to use. You may need to adjust the margins.

Tip You'll probably get better output if you print with the Windows 95 Hewlett Packard PostScript drivers rather than printing with the PCL5 drivers for the same printer.

Scenario If you're using the landscape printing orientation to print a monthly calendar on certain printers (including the Canon BJC600), you lose characters from the right edge of the page.
Solution Try adjusting the margins to accommodate the printable area your printer prints in .

Scenario You're unable to print envelopes on a Canon BJC-4000 printer. You chose File - Print, clicked the Layout s button, and selected either "Envelope #9"or "Envelope #10." Namely, the printer doesn't print anything.
Solution When you print envelopes on a Canon BJC-4000 printer (after selecting either "Envelope #9" or "Envelope #10"), you need to change the orientation and the margins of the layout.

To change the orientation and the margins of the layout:
1. Choose Edit - Layouts.
2. Select "Portrait" to change the layout orientation.
3. Click Paper.
4. Under "Margins," change "Top" to 3.5 and change "Bottom" to 1.5 to change the margins.

> Backup file

Scenario Organizer displays a blank binder when you try to open a file from the Backup directory with "Create backup when opened" selected.
Solution Copy the file to a different location or choose File - User Setup - Organizer Preferences and deselect "Create backup when opened."

> Archiving and compacting files

Scenario You're compacting a multiple-user Organizer file.
Solution If you're archiving information from a multiple-user Organizer file and have selected "Compact file after archive," the file must not be in use by any other users.

> Group scheduling

Tip If you have a repeating appointment, and you would like to change it to a meeting (that is, you want to invite people to the appointment), you should delete the repeating appointment and recreate it as a meeting.

Tip If you want to reschedule a meeting after the chairperson has sent you a confirmation, you have to propose the rescheduled meeting from the original meeting invitation, not from the confirmation.

Scenario In an Organizer 97 GS group-scheduling (.NSF) file, you open your mail file on the server and configure it for Organizer 97 GS. You do the same for a local replica of your mail file. You replicate your local replica with your mail file on the server after you configure each version separately. When you open either your replica or server version of your mail file in Organizer 97 GS, you see duplicate tabs for each section in your file.

Solution 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 then open your mail file from the server.
5. When prompted, click Yes to configure your mail file for Organizer 97 GS.
6. Replicate your changes to your local replica.

This procedure configures your replica with one set of tabs for each section.

Caution Do not delete any entry marked as "Do not delete" under any circumstances except in the scenario described above.

Scenario You're using Notes 4.5, and you created a repeating meeting and selected customized instances (such as, every week on Monday and Friday, or every month on the first Tuesday and the third Thursday). When you send this repeating meeting to a user running Organizer 2.11, the user sees only the first instance of the repeating meeting (such as, every week on Monday, or every month on the first Tuesday). The additional appointments appear in the Organizer 2.11 user's Calendar section.

Solution Organizer 2.11 users should check their Calendar section after accepting a repeating Notes 4.5 meeting to ensure that they are aware of any additional appointments beyond the first instance of the appointment.

Scenario You're scheduling a meeting using group scheduling and want to invite someone whose name isn't in either a Personal Address Book or a Public Address Book.

Solution You need to include invitees to a meeting in an accessible Personal Address Book or Public Address Book in order to invite them to a meeting using group scheduling. You can also use the Notes invitation form to use names that aren't in an accessible Personal Address Book or Public Address Book.

Scenario You and another user tried to resolve a conflicting entry in an included section; afterward, you both saw the same entry twice.

Solution Edit one of the two conflicting entries so that it contains all of the information from both entries; delete the other entry.

   Tip Only one user should resolve the conflict.

Scenario You're using Notes 4.5 and you received a meeting invitation from a chairperson using Organizer 2.11. You selected "Pencil In" to tentatively accept the invitation. The chairperson opens your response. The meeting response indicates that you accepted the meeting invitation, rather than tentatively accepted it.

Solution You can let the chairperson know that this is a tentative acceptance and not a full acceptance.

Scenario You're using Notes 4.5 and you received a meeting invitation from a chairperson using Organizer 2.11. You opened the invitation, clicked the Reply tab, entered a message, and clicked Accept. When the chairperson opened your response, the message wasn't included.

Solution A chairperson using Organizer 2.11 won't receive any comments you enter when you replied to an invitation sent using Organizer 2.11. However, a chairperson using Organizer 2.11 will receive comments you enter if you propose a rescheduling of the meeting. A new dialog box appears to allow you to propose a rescheduling of the meeitng. You can enter comments in the "Reason to change" field, which appears in the new dialog box. These comments will reach a chairperson using Organizer 2.11.

Scenario You've been given Editor access to another user's Notes mail file. In Organizer, you try to create an entry in the Calls, Planner, or Notepad section, and an error message appears, telling you that you don't have the required access rights to create the entry.

Solution The owner of the file probably hasn't created an entry in the Calls, Planner, or Notepad section of the file you're working in. You can do one of the following:

   • Have the owner create entries in those sections first. You can then create new entries in those sections.

- Have the owner give you "Editor" access with the option "Create shared folders/views" selected in the Access Control List (ACL) for that mail file. You can then create entries in those sections without the owner having to create some entries first.

See the Notes Help system or your system administrator for more information on modifiying the ACL.

Scenario After you process your meeting invitations, they still remain in your Notes Inbox. When you delete the meeting invitations from your Notes Inbox, the corresponding meetings are removed from your calendar.

Solution You can automatically remove meeting invitations from the Inbox folder after you respond to them. In Notes, perform the following steps:
1. Choose Actions - Calendar Tools - Calendar Profile.
2. Click "Advanced Calendar Options."
3. Select "Remove Invitations from my Inbox after I respond to them" and click OK.

Notes removes invitations from the Inbox folder but doesn't remove the corresponding meeting entries from the Calendar and Meeting views.

Scenario Some of the responses you receive to a meeting invitation you've sent as chairperson aren't displayed in your Meeting Notes dialog box, but they automatically update the meeting status. The meeting invitations still remain in your Notes Inbox. When you delete the meeting notice response from your Notes Inbox, the corresponding status for the invitees is removed from the meeting.

Solution Create a folder in your mailfile, name it "Meeting Responses," and move all the invitee's responses to this folder.

> **Combined Calendars**

Scenario You're combining your Calendar section with another user's Calendar section.

Solution Before you combine someone else's Calendar Notes mail file section with your own Calendar, be sure to set the appropriate access priviliges through the Notes Calendar Profile.

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