

Lotus

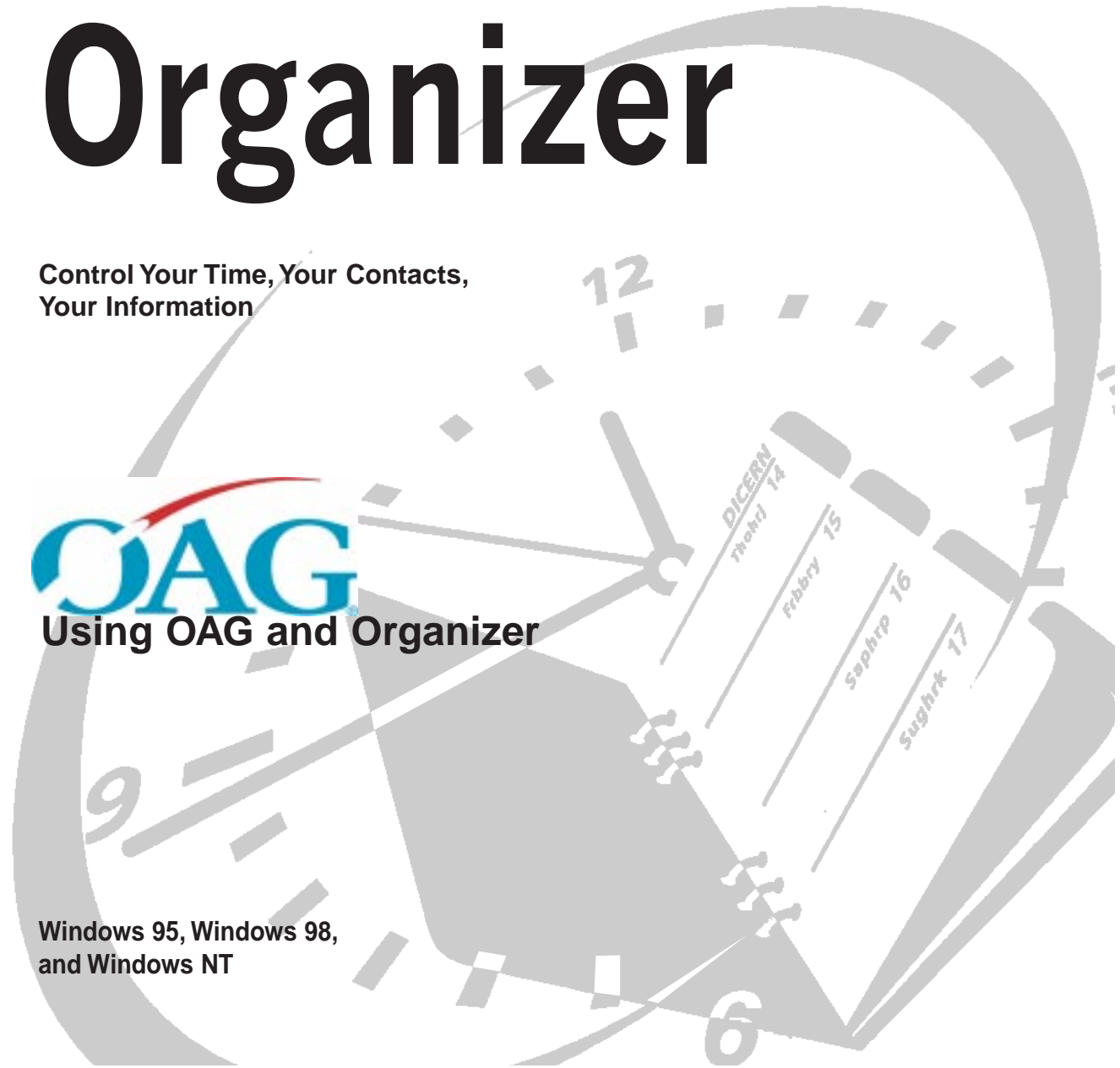
Organizer

Control Your Time, Your Contacts,
Your Information



Using OAG and Organizer

Windows 95, Windows 98,
and Windows NT



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Contents

Using OAG and Organizer	1
Installing OAG	1
Sending OAG trip information to Organizer	2
Creating Organizer entries with OAG trip information.....	3
Looking at your OAG trip information in Organizer	5
Sending OAG trip information to an Organizer file	5
Index	11

Using OAG and Organizer

Welcome to Using OAG and Lotus Organizer OAG®, the most popular travel planning information system in the world, is the primary source for both domestic and international flight schedules and fare information. You can select a flight and rental car using OAG FlightDisk® and make hotel choices using OAG HotelDisk™. Once you've selected your flight and made your hotel choices, you can then send some or all of your trip information to your Organizer® file.

You can create:

- Calendar appointments containing your flight information, including departure/arrival times and airline/flight numbers
- To Do tasks to remind you to complete the arrangements you created in your OAG trip plan, such as booking your flight, making hotel reservations, and renting a car
- Planner events for the duration of your trips
- Notepad pages with a complete itinerary of your trip, including flight, hotel, and car rental information
- Links between all of the Organizer entries related to a trip

In addition, you can use OAG FlightDisk and HotelDisk to obtain information on the area you'll be visiting, such as local attractions, convention facilities, and climate information. You can also use OAG's mapping features to determine what points of interest are located near the hotel you choose and determine distances between various points.

Installing OAG

The following information provides step-by-step instructions for installing OAG to use with Organizer. OAG requires 4MB of RAM and 50MB of disk space when you install the monthly updates.

To install Organizer and OAG on a stand-alone computer, run Install from Windows 95 or Windows NT. Be sure to close any open programs on your computer before you begin installing Organizer and OAG.

1. Insert the Organizer CD in your CD-ROM drive.
2. From the Windows taskbar, Click Start and then choose Run.
3. Type **D:\Install** in the “Open” box and click OK.

Note If your computer’s CD-ROM drive doesn’t use the letter “D,” substitute the letter of that drive.

4. Enter your name and company name, and click Next in the Welcome to the Lotus Organizer Install Program screen.

Note The name you enter is recorded as the registered user for the software.

5. Install asks you to confirm that the names you entered are correct.
 - Click Yes to confirm the names and display the next screen.
 - Click No to return to the previous screen and enter the names again.
6. Follow the instructions that appear on the screen.

Once Install is complete, the Organizer Extras dialog box appears.

7. In the Organizer Extras dialog box, select “OAG Travel Information System™.”
8. Click Install and follow the instructions that appear on the screen.
9. Click Done to close the Organizer Extras dialog box.

Note If you install Organizer from a network node or from a file server, the Organizer Extras dialog box is unavailable. You can install OAG from the Organizer CD after you finish the node or file server install. To install OAG, insert the Lotus Organizer CD in your CD-ROM drive.

Click the Windows Start button, choose Run, and type

D:\Extras\OAG\Setup.exe. Follow the instructions that appear on the screen.

Sending OAG trip information to Organizer

You can send your OAG trip information to your Calendar, To Do, Planner, and Notepad sections. You can send your information to all of these sections, or send it to selected sections. You can also link all of a trip’s Organizer entries for easy access between the entries. Your OAG trip information remains in OAG after you send it to Organizer.

Note Once you’ve sent your trip information to Organizer, you then need to reserve and pay for the flight, hotel, and car rental segments you created in your OAG trip plan.

Creating Organizer entries with OAG trip information

1. In Organizer, click the OAG icon.

OAG FlightDisk opens.

2. Create a trip plan in OAG.

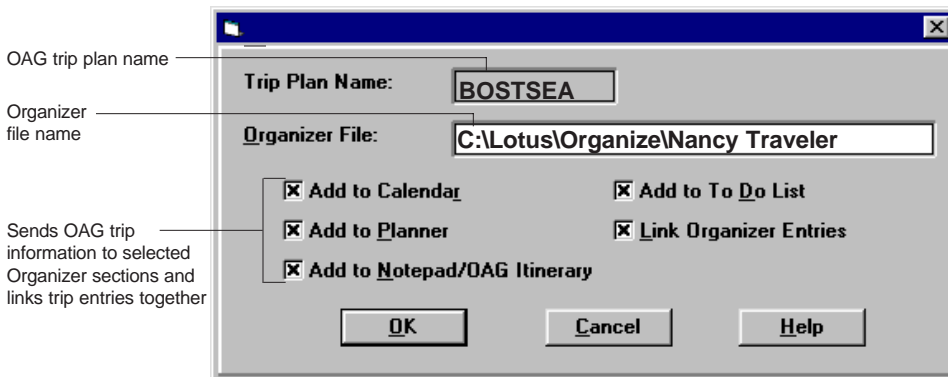
Note Your OAG trip plan can contain segments for your flights, car rental, and hotel reservations. For more information on creating a trip plan in OAG, see OAG Help.

3. Name and save your trip plan in OAG.

Note Be sure to name your trip plan in OAG. If you don't name it when you save it, it's assigned the default name "Trip Plan 1." Subsequent unnamed trip plans will be assigned the default names "Trip Plan 2," "Trip Plan 3," and so on when you save them. Organizer uses this name for that trip plan's Organizer entries.

4. After creating the segments you want for your trip plan, in the Trip Plan dialog box, click the Organizer icon to send your trip information to Organizer.

The Lotus Organizer Update dialog box appears.



The name of the Organizer file to which you're sending OAG trip information appears in the "Organizer File" box.

The most recently used Organizer file appears in the "Organizer File" box. To select a different file, highlight the file name in the "Organizer File" box and press **DEL**. Press **ENTER**. In the Organizer File Open dialog box, search for the Organizer file you want to open.

5. Click OK.

6. If your Organizer file has a password, enter it under “Password” in the dialog box that appears.

Enter the password that corresponds to your level of access for that file. There are three levels of access to an Organizer file: Owner, Assistant, and Reader.

7. (Optional) Deselect the Organizer sections to which you don’t want to send OAG trip information.

<i>Option</i>	<i>Result</i>
Add to Calendar	Creates Calendar appointment with trip information in the Organizer file
Add to Planner	Creates Planner event with trip information in the Organizer file
Add to Notepad/OAG Itinerary	Creates page entry or OAG Itinerary (a special Notepad section) entry with trip information in the Organizer file
Add to To Do List	Creates To Do task with trip information in the Organizer file
Link Organizer Entries	Links together all Organizer entries associated with the trip plan

By default, entries are added to the Calendar, Planner, OAG Itinerary, Notepad and To Do sections of your Organizer file. If you don’t want to create an entry in a particular Organizer section (for example, To Do), deselect that section (in this case, “Add to To Do List”).

Note Before you send your OAG trip information to an Organizer file, be sure that the Organizer file contains the sections you specify in the Lotus Organizer Update dialog box. If the Organizer file *doesn’t* contain a section you specify in the Lotus Organizer Update dialog box (for example, a To Do section), then the entry for that section (in this case, a To Do task) won’t be created.

8. (Optional) Deselect “Link Organizer Entries” if you don’t want to link the trip plan’s corresponding Organizer entries to one another.

Note You can only link your Organizer trip entries together if you’re sending trip information to the Notepad section.

For more information on linking your trip plan’s corresponding Organizer entries to one another, see “Linking your Organizer trip plan entries.”

9. Click OK to send your OAG trip information to Organizer.

Note In Organizer, press **F9** after sending your OAG trip information to update your Organizer file with your newly created Organizer trip entries. If you don't press **F9**, you may not see your new Organizer trip entries unless you close and then re-open your Organizer file.

Looking at your OAG trip information in Organizer

When you send OAG trip information to Organizer, it appears in the Organizer section(s) you previously specified in the Lotus Organizer Update dialog box. For example, if you chose to have your trip information sent to Organizer's To Do section, a To Do task appears.

Sending OAG trip information to an Organizer file

When you send your trip information to an Organizer file:

- All Planner events you create when you select "Add to Planner" in the Lotus Organizer Update dialog box in OAG are assigned to the Travel Planner key. The Travel Planner key replaces the Unused5 Planner key when you install OAG.
- All Notepad pages you create when you select "Add to Notepad" in the Lotus Organizer Update dialog box in OAG appear in the "OAG Itinerary" Notepad section. The OAG Itinerary Notepad section is created when you install OAG. Existing Notepad section(s) aren't affected by the OAG Itinerary section.

If you're using a pre-existing Organizer file, you *won't* see the Travel Planner key or the OAG Itinerary Notepad section. However, you can rename the Unused5 Planner key to Travel in your existing Organizer file. Similarly, you can rename an existing Notepad section, or create a new Notepad section, called "OAG Itinerary" in your pre-existing Organizer file. OAG trip information you send to the Notepad section will appear in this renamed or newly created section. You can also create a new Organizer file and import information from your existing Organizer file to this new file.

Seeing OAG trip information in Organizer Calendar appointments

When you send your OAG trip information to the Organizer Calendar section, it creates a Calendar appointment for each flight segment you create. Each appointment contains the names of the cities you're traveling to and from, as well as the arrival and departure times and flight numbers. All OAG trip Calendar appointments are automatically assigned the "Travel" category.

The screenshot shows the Lotus Organizer interface with a calendar view for February 2000. The main window displays a calendar grid with a highlighted appointment for Monday, February 21, 2000, at 11:00 AM. The appointment is titled "BOSTSEA Trip" and contains the following details: "From Boston, MA, USA", "To: Seattle/Tacoma, Washington, USA", "Flight: NW 95", and "Dep: 8:30a Arr: 11:44a". The appointment is linked to a "To Do" task and a "Planner" event for the trip. The interface includes a menu bar (File, Edit, View, Create, Section, Appointment, Phone, Help), a toolbar, and a sidebar with various tasks like "Meetings", "E-mail", and "Clipboard".

OAG icon

Shown-through To Do task and Planner event for trip

Link to trip's other Organizer entries

Departure and arrival times for Boston (EST)

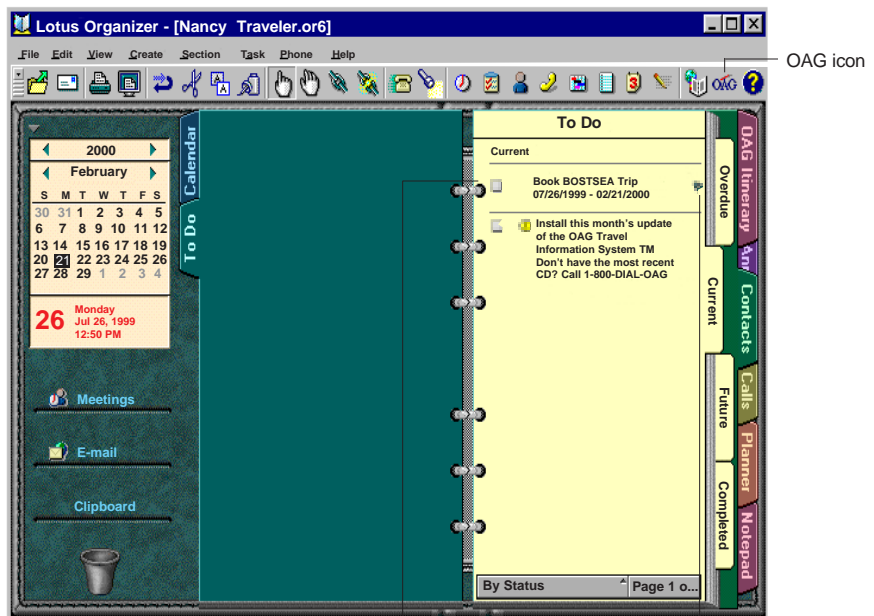
Calendar appointment for trip (with Boston (EST) departure time and Seattle (PST) arrival time and airline information)

Note If the city you're traveling to is in a different time zone than the city you're traveling from, departure and arrival times are shown in two different ways in your Calendar appointment. In the example on the previous page, the upper and lower left corners of the appointment show both departure and arrival times for Boston (EST). Additionally, in the appointment information area, the departure time shows Boston's 8:30 AM (EST) departure time, and the arrival time shows Seattle's 11:44 AM (PST).

Seeing OAG trip information in Organizer To Do tasks

When you send your OAG trip information to the Organizer To Do section, it creates an unprioritized To Do task to remind you to complete the arrangements you created in your OAG trip plan. By default, the task's start date is set to the date you sent the trip information to Organizer, and the end date is set to the first day of your trip. The To Do task is automatically assigned the Travel category.

Tip You can assign a priority to the To Do task in Organizer, as well as change the start and end times for the To Do task. Changes you make to the trip information in Organizer don't affect the trip information in OAG.



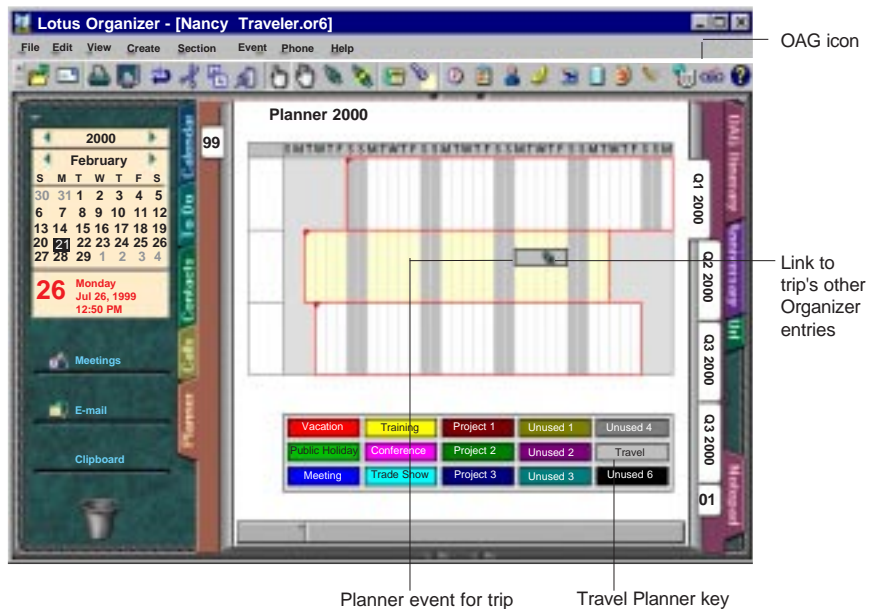
To Do task to complete trip arrangements (book flights, reserve hotel room, rent car)

Link to trip's other Organizer entries

Seeing OAG trip information in Organizer Planner events

When you send your OAG trip information to the Organizer Planner section, it creates a Planner event for the duration of your trip. By default, the Planner event's start date is set to the first day of your trip, and the end date is set to the last day of your trip. The Planner event is automatically assigned the Travel category.

The Unused5 Planner key is renamed to "Travel" when you install OAG. If you're using a pre-existing Organizer file, you won't see the Travel Planner key. However, you can rename the Unused5 Planner key to "Travel" in your pre-existing Organizer file. All of your OAG trip plan's corresponding Planner events are automatically assigned to the Travel Planner key.

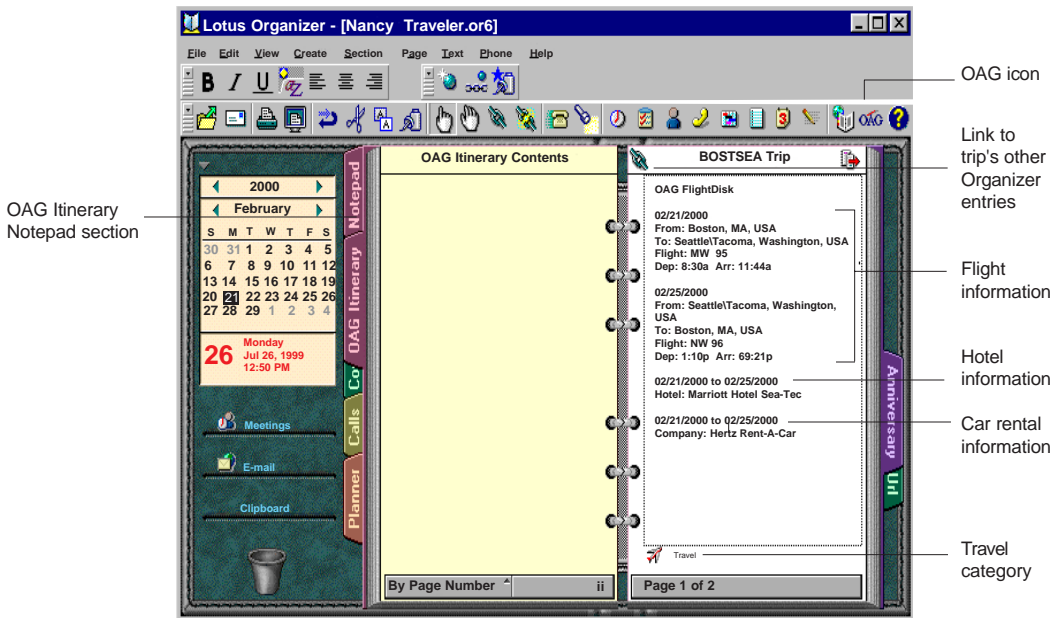


Tip You can assign a different Event type to the Planner event (that is, from "Travel" to "Vacation," for example), as well as change the start and end times for the Planner event. Changes you make to the trip information in Organizer don't affect the trip information in OAG.

Seeing OAG trip information in Organizer Notepad pages

If you're using an Organizer file, a new Notepad section called "OAG Itinerary" is created when you install OAG. If you're using a pre-existing Organizer file, you *won't* see the OAG Itinerary Notepad section. However, you can rename your Notepad section to "OAG Itinerary" in your existing Organizer file.

When you send your OAG trip information to the Organizer Notepad section, it creates a Notepad page in OAG Itinerary with information from your trip plan's segments (that is, the flight, car rental, and hotel segments).



Linking your Organizer trip plan entries

When you're sending your OAG trip information to your Organizer file, the "Link Organizer Entries" option in the Lotus Organizer Update dialog box in OAG is selected by default. This links together all of your trip plan's corresponding Organizer entries, letting you cross-reference these Organizer entries. However, you can only link your Organizer trip entries together if you're sending trip information to the Notepad section. For example, let's say you send your OAG trip information to your Calendar, To Do, Planner, and Notepad sections and link these entries together. You can then click the link in the Notepad section to display links to the trip plan's corresponding entries in the Calendar, To Do, and Planner sections.

Note If you *don't* want to link together your trip plan's corresponding Organizer entries, deselect "Link Organizer entries" in the Lotus Organizer Update dialog box in OAG.

The screenshot shows the Lotus Organizer interface for a file named "Nancy Traveler.or6". The main window is divided into several sections:

- Calendar:** Shows the month of February 2000. The date 26 is highlighted in red, indicating it is the current day (Monday, Jul 26, 1999, 12:50 PM).
- OAG Itinerary Contents:** A list of trip entries:
 - BOSTSEA Trip From: Boston, MA, USA to: Seattle/
 - BOSTSEA Trip From Seattle/Tacoma, Washington
 - Travel - BOSTSEA Trip - 02/21/2000-02/25/2000
 - Book BOSTSEA Trip - due 02/21/2000
- BOSTSEA Trip Details:** A detailed view of a flight entry:
 - OAG FlightDisk
 - 02/21/2000
 - From: Boston, MA, USA
 - To: Seattle/Tacoma, Washington, USA
 - Flight: NW 95
 - Dep: 8:30a Arr: 11:44a
 - 02/25/2000
 - From: Seattle/Tacoma, Washington, USA
 - To: Boston, MA, USA
 - Flight: NW 96
 - Dep: 1:10p Arr: 8:21p
 - 02/21/2000 to 02/25/2000
 - Hotel: Marriott Hotel Sea-Tac
 - 02/21/2000 to 02/25/2000
 - Company: Hertz Rent-A-Car
 - Travel

Labels on the left side of the image point to specific elements:

- OAG icon:** Points to the "OAG" icon in the top right corner of the toolbar.
- Link to trip's other Organizer entries:** Points to the "BOSTSEA Trip" entry in the "OAG Itinerary Contents" list.
- Organizer's linked trip entries:** Points to the "BOSTSEA Trip" entry in the "OAG Itinerary Contents" list.

Index

C

- Calendar appointments
 - displaying different time zones in, 7
 - sending OAG trip information to, 6

I

- Installing OAG, 1

L

- Linking
 - deselecting linking option, 10
 - Organizer trip-related entries, 4, 10
- Looking at OAG trip information in Organizer, 5

N

- Notepad pages
 - in Organizer files, 5, 9
 - sending OAG trip information to, 9

O

- OAG trip information
 - creating Organizer entries with, 2
 - linking together in Organizer, 2, 10
 - looking at new entries in Organizer, 5
 - seeing in Organizer, 5
 - sending to Calendar, 6
 - sending to Notepad, 9
 - sending to Organizer files, 5
 - sending to Planner, 8

- sending to To Do, 7
- Organizer file
 - selecting a different file, 3

P

- Password
 - entering for Organizer file 4
- Planner events
 - changing Event type, 8
 - changing Planner key name in Organizer, 5, 8
 - changing start and end times for, 8
 - in Organizer files, 8
 - sending OAG trip information to, 8

S

- System requirements for OAG, 1

T

- To Do tasks
 - assigning a priority to, 7
 - sending OAG trip information to, 7



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