

LOTUS ORGANIZER 2.1 RELEASE NOTES

November, 1995

Welcome to Lotus Organizer 2.1, the award-winning personal information manager (PIM) with shared calendaring and group scheduling for Lotus Notes and cc:Mail users. These Release Notes contain important information for advanced users and administrators that supplements the printed documentation and online Help.

PLEASE MAXIMIZE THIS WINDOW TO READ THIS FILE.

The Release Notes contain the following topics:

- * What's New in Organizer 2.1?
- * Installing Organizer with SmartSuite 96
- * Technical Information for Organizer 2.1
- * Preserving Organizer Settings When You Upgrade to Organizer 2.1
- * Converting an Organizer 1.x Run Program Setting to an Organizer 2.1 Alarm Launch Setting
- * For Organizer 1.x Users Upgrading to Organizer 2
- * Importing and Exporting Accented Characters to ANSI or ASCII Text Files
- * Processing Repeating Meeting Notices as Chairperson
- * Ensuring Meeting Notice Delivery to Group Members with Notes Hierarchical Names
- * Displaying Meeting Status for Organizer 1.x Users
- * Running Organizer 2.1 Group Scheduling with Notes under WIN-OS/2
- * Obtaining INIEDIT.EXE to Configure the Organizer OS/2 Agent .INI Settings
- * Configuring Organizer for Dynamic Attachments
- * Refreshing the Lotus Organizer Administration 2.1 Program Screen
- * Using Organizer with SmartSuite 96 and Other Lotus Products
- * Archiving Organizer Files (Stand-alone)
- * Node User Error

What's New in Organizer 2.1?

Organizer 2.1, with group scheduling and shared calendaring for Lotus Notes and cc:Mail users, offers enhancements for Organizer users and administrators. Enhancements are listed below:

Performance

Organizer 2.1 provides improved performance in the following areas:

- * Launching Organizer
- * Opening an Organizer file
- * Choosing meeting attendees from a large directory
- * Displaying free and busy time when group scheduling
- * Searching for information in Organizer files

Printing

- * Three new print layouts: Calendar Weekly 2-Page, Calendar Daily Page, and Notepad Contents
- * Six new layouts for Labels (International): Avery(R) L7902 (A5), Avery L7901 (Filofax(R)), Avery L7162 (16), Avery L7163 (14), Avery L7159 (24), and Avery L7666.
- * Printing of entries that show through to the Calendar section for the following Calendar layouts: Monthly Calendar, Weekly 2-Page, or Daily page
- * Revised print range defaults

Lotus Organizer Administration 2.1 Program

Organizer 2.1 includes several enhancements designed to provide easier administration of group calendaring and scheduling over a LAN. They include the following improvements in the Lotus Organizer Administration 2.1 program:

- * A utility program to re-index and compact Organizer files available from the Lotus Organizer Administration Program Utilities menu or from the user's File menu. It can also be run in batch mode by the administrator.
- * Utilities menu option to specify user access and set a password for .OR2 files
- * Improved Lotus cc:Mail login
- * Resizable columns within views
- * Modified Preferences dialog box for specifying error reporting
- * More .INI file settings (See the Lotus Organizer Administrator's Guide and TECHNOTE.OR2 sample file.)
- * Sticky Name & Address Book setting for Notes
- * Sticky login setting for Lotus cc:Mail
- * Smarter name matching (multiple characters)
- * New accelerators keys (Press DEL for Edit - Clear; CTRL-G for Edit - Go To; and F1 for Help)
- * Context-sensitive menus for Lotus Notes or Lotus cc:Mail installations

Note: The Organizer Administration program for Notes or cc:Mail should only be run from a PC with the appropriate mail system (Notes or cc:Mail) properly installed and the program directory location included in the PATH statement. If you run the Administration program from a PC without Notes or cc:Mail installed or without the mail system's program directory in the path, you will encounter a serious error.

Scheduling Agent

- * 32-bit OS/2 scheduling agent for Lotus Notes and cc:Mail
- * ccDownFrequency .INI setting that controls how often the agent checks whether the cc:Mail post office is shut down or running. The agent pauses if the post office is shut down. The agent resumes when the post office is running.

Documentation

- * Updated Lotus Organizer 2.1 Administrator's Guide
- * Lotus Organizer Administration 2.1 Program Help (online documentation)
- * Lotus Organizer 2.1 Deployment Questions and Answers files for Group Scheduling with Lotus cc:Mail (CDEPLOY.WRI) and with Lotus Notes (NDEPLOY.WRI) installed in the \LOTUS\ORGANIZE\ADMIN directory
- * Quick Reference Card
- * New Troubleshooting section in Help (online documentation) that contains tips on using files, managing information, performing Organizer tasks, and printing
- * Lotus Organizer 2.1 Print Layout Guide that contains illustrations, tips, and descriptions of the different layouts you can use to print Organizer sections

General

Lotus Organizer Release 2.1 also includes fixes for issues reported by Customer Support, such as:

- * Meeting notices delivered in an email with OS/2 scheduling agents
- * Better resource use in cascading Notes Name & Address Books when group scheduling
- * Better memory management for the OS/2 scheduling agent
- * Group scheduling between Lotus Notes Organizer users with hierarchical names and Lotus cc:Mail Organizer users
- * Administrators can now create views in Notes based on the Organizer information in the Notes Name & Address Book

Installing Organizer with SmartSuite 96

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If you have been using Lotus Organizer 2.1 and you install SmartSuite 96, the location of your Organizer program files and sample files will change to the following:

Organizer program files will be installed in the LOTUS\ORGANIZE program directory instead of in the ORG2 program directory.

Organizer sample files (including ALMANAC.OR2 and TECHNOTE.OR2) will be installed in the LOTUS\WORK\ORGANIZE\ subdirectory instead of in the ORG2\ORGFILES subdirectory. If you choose Custom Install when you install SmartSuite 96, you must select Sample files to install ALMANAC.OR2 and TECHNOTE.OR2.

In order for Node users to access files in the LOTUS\WORK\ORGANIZE\ directory on the file server, the users must be granted full network access rights to this directory for the network you are using. Refer to the section titled "Specifying file server information" in Chapter 3 of the "Lotus Organizer 2.1 Administrator's Guide" for additional information on assigning network rights for Organizer 2.1.

Technical Information for Lotus Organizer 2.1

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Lotus Organizer 2.1 Administrator's Guide

For complete information on installing and setting up Organizer group scheduling, see the Lotus Organizer Release 2.1 Administrator's Guide.

TECHNOTE.OR2 File

See the TECHNOTE.OR2 file in the \LOTUS\ORGANIZE\WORK directory for tips and troubleshooting information. It provides technical information for advanced users and administrators. For quick access to TECHNOTE.OR2, complete the stand-alone installation (with no group scheduling) and open the file.

TECHNOTE.OR2 contains three Notepad sections: General, Group Scheduling and .INI Files. These sections cover the following topics:

General

- * Address
- * Alarms and Sound
- * Autodialer & Modem
- * DDE
- * Display & Screen Drivers
- * Files
- * Import/Export
- * Organizer 2.1 File Compact
- * Print
- * SmartSuite
- * User Access List

Group Scheduling

- * Agent
- * Installation/Configuration
- * Organizer Administration Program
- * Notes Group Scheduling
- * Scheduling Tips

.INI Files

Lotus Organizer 2.1 Deployment Questions and Answers for Group Scheduling

See the Lotus Organizer 2.1 Deployment Questions and Answers for Group Scheduling files in the \LOTUS\ORGANIZE\ADMIN directory on the file server for deployment information for administrators who install, configure and maintain Lotus Organizer 2.1 for group scheduling with Lotus Notes (NDEPLOY.WRI) or cc:Mail (CDEPLOY.WRI).

Preserving Organizer Settings When You Upgrade to Organizer 2.1

When you upgrade Organizer 2.1 from an earlier 2.x release (for example, 2.0a), the Organizer Install program saves your settings (for example, Organizer Preferences, custom paper layouts, and so on) by backing up ORG2.INI and ORG2NET.INI to ORG2.BAK and ORG2NET.BAK respectively. After completing the installation, you can restore your settings using a text editor to copy settings from ORG2.BAK and ORG2NET.BAK to the Organizer 2.1 ORG2.INI and ORG2NET.INI files.

Converting an Organizer 1.x Run Program Setting to an Organizer 2.1 Alarm Launch Setting

When you convert your Organizer 1.x file (.ORG) to an Organizer 2 file (.OR2), any application you set up to launch at a certain time in your Organizer 1.x file must be manually entered in your Organizer 2.1 file as an alarm after you've converted the file.

For Organizer 1.x Users Upgrading to Organizer 2

Please note the following change in your READ ME FIRST brochure For Organizer 1.x Users Upgrading to Organizer 2. On page 2, under the heading Checking and compressing you Organizer 1.x file, replace step 3 with the following:

3. Click the program icon in the top left corner.

Importing and Exporting Accented Characters to ANSI or ASCII Text Files

When you install Organizer 2.1 after you have installed either Lotus Forms or Lotus Notes ViP, you need to substitute the following four Intersolv ODBC driver files from your Organizer file server's \ORG2\WINSYS directory to the \WINDOWS\SYSTEM directory on your local hard drive.

LOUTL06.DLL
LOBAS06.DLL
LOFLT06.DLL
LOTXT06.DLL

Note: You may want to back up the original files before copying them.

Substituting these files lets Organizer correctly Import and Export accented characters to either ANSI or ASCII text files. However, these four drivers may cause problems with Forms and ViP applications which use Microsoft Excel drivers.

Processing Repeating Meeting Notices as Chairperson

When a chairperson is processing responses from repeating meeting invitations, the chairperson's Notify button is disabled because Organizer 2.1 attendees cannot process status updates for repeating meetings even if Organizer Preferences - Meeting Notices - Automatically process - As attendee - Status updates is selected.

Ensuring Meeting Notice Delivery to Group Members with Notes Hierarchical Names

When you send an invitation to a list and the expanded list contains a flat Notes user name that the Notes Administrator has already changed to hierarchical, this user doesn't receive a meeting notice. To ensure that this member of the group receives meeting notices, change the Notes name from flat to hierarchical in all lists which contain that user.

Displaying Meeting Status for Organizer 1.x Users

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When an Organizer 1.x user accepts a meeting invitation from an Organizer 2.1 chairperson with a Notes hierarchical name, Organizer 1.x correctly books the meeting in the user's Calendar but does not deliver an acceptance notice to the chairperson. Consequently, when this chairperson checks the status of the meeting, the Organizer 1.x user's status remains as Invited.

Running Organizer 2.1 Group Scheduling with Notes under WIN-OS/2

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You can install and configure Organizer 2.1 group scheduling with Notes under WIN-OS/2 using OS/2 2.1 or OS/2 Warp (3.0). To do this, you must fully install and configure the Lotus Notes client for Windows; Organizer will not schedule group meetings if you install only a Notes client for OS/2. However, if you want to use the Notes Windows client for Organizer group scheduling and the Notes OS/2 client for all other Notes functions, you may install both the Notes Windows and OS/2 clients.

This section assumes that you are familiar with OS/2, your LAN operating system, Organizer, and Notes installation procedures and functions.

Installing and Configuring Organizer Group Scheduling with Notes under WIN-OS/2

1. Install Lotus Organizer 2.1 on a file server, specifying the correct network software (for example, Novell) and specifying Notes as the scheduling method. After you install Organizer on the file server, create users with the Organizer Administration Program and install the necessary scheduling agents. For complete information on installing and configuring Organizer, see the Lotus Organizer Administrator's Guide.

2. Configure the LAN software on the OS/2 PC to allow LAN support under WIN-OS/2. For more information on LAN configuration, see your LAN software documentation or contact the LAN administrator.

Note: The Netware resources installation option for Novell Netware OS/2 drivers should be set to Global.

3. In a WIN-OS/2 full screen session, use the default WIN-OS/2 session settings and install a Lotus Notes Windows client.

4. Configure the Notes client to be used for Notes mail. The user's Notes ID must be set as well as his/her mail server and mail file information. Test the Notes installation by opening the user's mail file from the Notes server and sending a Notes mail message. Any problems must be resolved prior to proceeding.

Note: Because running NETBIOS simultaneously in OS/2 and WIN-OS/2 sessions is not supported, you may have to set up additional LAN ports to access Notes servers. For example, if NETBIOS is being used in OS/2 sessions, and IPX/SPX emulation is available in DOS/WIN-OS/2 sessions, then a LAN port to allow IPX/SPX connections must be created under Tools - Setup - Ports. For more information, see your Notes administrator as to what types of LAN ports may be used and for instructions on setting up these ports properly.

5. Close the WIN-OS/2 full screen session.

6. Open the AUTOEXEC.BAT file from the root of the OS/2 boot drive, and add the Notes Windows client directory to the PATH statement.

7. In a new WIN-OS/2 full screen session, use the default WIN-OS/2 session settings and run a Lotus Organizer Node Install.

8. Launch Organizer to test group scheduling. You will be prompted to enter a password on the user's Notes ID if one exists. Once the password is entered and accepted, test the Organizer installation by opening the user's file by the user name and scheduling a test group meeting.

Streamlining the Notes Windows Installation

If the user of an OS/2 workstation normally uses a Notes OS/2 client and wishes to continue doing so, as well as participate in group scheduling, some of the Notes Windows client files may be deleted to save disk space. Below is a list of the Notes files required to allow Organizer group scheduling to function. These files use about 2 megabytes of disk space.

The following Notes files are required to schedule group meetings using Organizer.

_BSAFE.DLL
_COMPUTE.DLL
_COMPUTF.DLL
_COMPUTN.DLL
_EVENTL.DLL
_FT.DLL
_IRTF.DLL
_LIB.DLL
_NET.DLL
_NETBIOS.DLL
_NIF.DLL
_NSE.DLL
_NSF.DLL
_NWSPX.DLL
_ROUTERL.DLL
_SDK.DLL
_STRINGS.DLL
_TCP.DLL
_VINES.DLL
_XPC.DLL
DESKTOP.DSK
VIM.DLL

All .CLS files (The exact names will depend on the codepage and language options for the PC.)
The user's Notes ID

In addition, the NOTES.INI file that was created in the X:\OS2\MDOS\WINOS2 directory during installation and configuration must also be present.

Note: Deleting files from the Notes Windows client directory will let Organizer schedule meetings using Notes and Organizer, but the Notes Windows client will no longer run.

Obtaining INIEDIT.EXE to Configure the Organizer OS/2 Agent .INI Settings

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Since OS/2 stores .INI settings in binary format, Lotus supplies an INI editor (INIEDIT.EXE) to configure .INI settings for the Organizer OS/2 Agent. You can download the INI editor from File Area 199 on the Lotus re:Quest BBS. The phone number is 617-693-7000.

Configuring Organizer for Dynamic Attachments

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Novell

To enable free time lookup of calendar files on NT servers using dynamic attachments, users must have Read permission for the NT directory which contains the Organizer files. This is the same directory specified in Lotus Organizer Administration by server\volume name and directory path. For example,

Server\volume: homer\vol1
Directory: \lotus\org2\orgfiles

Note that you do not need to specify a drive letter for dynamic attachments. Users can have different drive mappings.

MS-Net

MS-Net does not allow dynamic attachments in Organizer. All users, agents, and administrators must map to the same drive letter to enable free time lookup. This is the same drive specified in Lotus Organizer Administration by directory path. The file server must also map a local drive to the network drive specified in this directory path. You do not specify a server\volume. For example,

Server\volume: <blank>
Directory: w:\lotus\org2\orgfiles

where w: is the drive letter to which all users (and the file server's local drive) must map.

Refreshing the Organizer Administration Program Screen

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In single-server installations of Lotus Organizer 2.1, when you delete multiple entries with the Organizer Administration program, it repaints the screen incorrectly. To correct this, minimize and restore the Lotus Organizer Administration 2.1 program window.

Using Organizer with SmartSuite 96 and other Lotus products

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Read the following for information about using Organizer with Word Pro, 1-2-3, and Ami Pro.

Paste Special and Link

When you choose Paste Special or Link to paste or link data from Word Pro or 1-2-3 to an Organizer Notepad page, be sure to switch to a different section of Organizer before choosing Save As.

Merging Organizer Addresses with Lotus Word Pro

You can merge Organizer address records with a Word Pro document (such as a letter) by using the ORGMERGE.LWP script supplied with Word Pro in the \LOTUS\WORDPRO\SCRIPTS directory.

Merging Organizer Addresses with Lotus Ami Pro

You can merge Organizer address records with an Ami Pro document by using the ORGMERGE.SMM macro supplied with Organizer in the \LOTUS\ORGANIZE directory. The merged records will be in alphabetical order by last name. Other versions of the macro that let you merge using different sort orders will be available on the Lotus re:Quest BBS. If you want to edit ORGMERGE.SMM to produce different sort orders, contact Lotus FAX Support at 617-253-9150.

Archiving Organizer Files (Stand-alone)

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If you are using Organizer as a stand-alone product and you want to archive files, be sure that the Save option on the Organizer Setup dialog box is set to the default setting of Only when told. Changing this setting to After each change may result in data loss.

Node User Error

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Node users who load Organizer 2.1 from SmartSuite 96, after having just installed it, while in the same Windows 95 session, may encounter the error message "Drive c: cannot be selected right now. Try again later" when trying to access drive C: from within the dialog box of some of the File commands such as File Open, File Save, File Save As, File Import, and File Export.

This behavior is one that some 16-bit applications, including Lotus Organizer 2.1, have displayed when running under Windows 95. The problem is not specific to Organizer 2.1 or any other Lotus 16-bit applications running under Windows 95. Microsoft Premier Support has been made aware of this issue.

The problem can be quickly resolved by doing one of the following actions after canceling the error message and closing the appropriate File dialog box:

1. Open any 32-bit application you have installed under Windows 95, or,
2. Shut down Windows 95, then restart it.

Either of these actions will refresh the default file directory listed in the Organizer 2.1 File command dialogs and allow users to access drive C:.