Lotus

Organizer 97 GS EDITION

The Leading Time Manager
for Individuals and Groups.

EXPLORING ORGANIZER

WINDOWS 95

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Chapter 1
Before You Begin

Welcome to Lotus Organizer® 97 GS for Windows 95. This chapter describes the contents of your Organizer® package and how to use this book.

What's in your package

Your Organizer package includes software, documentation, and registration information.

Disks or CD

Your Organizer package includes either a set of 3.5” high-density disks or one CD-ROM.

Printed and online documentation

Your documentation consists of this book, a quick-reference card, a print layout guide, and online documentation. Online documentation includes Help and a Tour. For detailed information about Help, see Chapter 3.

Documentation	*Contents*
Exploring Organizer	Comprehensive printed documentation describing how to perform all Organizer tasks and customize Organizer.
Quick Reference Card	Printed card that gives you quick reminders on how to perform basic Organizer tasks.
Help (online documentation)	Comprehensive online documentation showing steps to perform Organizer tasks; includes an index that lets you easily access topics.
Tour (online documentation)	Animated tour that introduces you to Organizer tasks.
Readme	Text file that provides additional information about Organizer.

Registration card

Please fill out the Lotus® registration card as directed. You must mail in your registration card to receive information on Organizer updates.

How to order more printed documentation

To order additional printed documentation for Organizer, call Lotus General Business Sales and Service. In the U.S., call (800) 343-5414; in Canada, call (800) GO-LOTUS or (800) 465-6887.

Exploring Organizer provides a task-oriented approach to learning and using Organizer. It contains information crucial to the novice and helpful to the moderate-to-experienced Organizer user.

Exploring Organizer focuses primarily on Organizer's PIM (.OR4) features. However, Chapter 14 is devoted exclusively to group-scheduling (.NSF) features, and important differences between PIM (.OR4) and group scheduling (.NSF) are noted throughout the documentation.

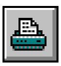
Conventions used in this book

Exploring Organizer uses the conventions below.

Note introduces additional technical information about a step or procedure.

Tip introduces additional information you may find helpful when you perform a command or procedure.

Caution provides information essential to the safety of your information and software.



Toolbox icons and SmartIcons® appear next to a step in a procedure when you can use the icon in place of the command(s), or next to information referring to the icon.

Key names appear in small capital letters. For example, **ESC** and **ENTER**.

Key names separated by + (plus sign) indicate that you must press and hold the first key while you press the second key, and then release both keys. For example, **CTRL+Z**.

File names, paths, and directories in italics mean you replace the information with what's correct for you. For example, *x:/file name*.

Information that you type appears in a different typeface. For example, Type **Marketing agenda** means that you type the words "Marketing agenda."

Commands can appear strung together. For example, File - Open. Click the first command, File, and then choose the second command, Open, by clicking it.

For more information directs you to information in Help (online documentation).

Chapter 2
Installing Organizer

You can install Organizer as a stand-alone application or on a network. If you install Organizer files on a network (file server or network node), you can share your Organizer files with other users. This chapter instructs you on how to install and run Organizer for the first time, how to upgrade files from earlier Organizer releases, and what new features are part of Organizer 97 GS.

System requirements

To run Organizer, you must:

- Use a 486-based computer that is certified for use with Microsoft Windows 95.
- Use a VGA monitor.
- Use a mouse, which isn't required but strongly recommended.
- Use Microsoft Windows 95.
- Install Lotus Notes® Release 4.51 32-bit client or later before installing Organizer 97 GS with group scheduling.
- Have 30MB of available hard-disk space on a stand-alone personal computer (PC) or notebook (laptop) computer for a full installation.
- Have 15MB of available hard-disk space on a stand-alone personal computer (PC) or notebook (laptop) computer for a minimal installation of files to run Organizer (without Tour, Help, or sample files).
- Have 30MB of available hard-disk space for a full installation on a network file server; installing Organizer to run from a network file server requires 3MB of available hard-disk space on each user's desktop computer.

Note Each of the installation options also requires hard-disk space of approximately 5MB for files in a temporary directory. When installation is completed, these files are automatically deleted.

Installing and setting up Organizer

The following information provides step-by-step instructions for installing and using Organizer as a stand-alone or networked application. If you're upgrading from Organizer Releases 2.x or 3.0, see "Upgrading to Organizer 97 GS," later in this chapter, for instructions on how to convert the files you created with earlier releases of Organizer.

Before you start the Install program

Before you start the Install program, be sure you have the following pieces of information:

- If you're installing Organizer as a stand-alone application, you need either the Organizer 97 GS Install disks or the Organizer 97 GS Install CD from your package.
- If you're installing Organizer to run on a network file server, you need either the Organizer 97 GS Install disks or the Organizer 97 GS Install CD. When you complete the file-server installation, users with licenses to run Organizer can install a network node from the file server.
- If you're installing Organizer 97 GS with group scheduling, you will need to have installed Notes Release 4.51 or later before installing Organizer 97 GS.
- If you're an Organizer Release 1.x user, you must first upgrade or convert your .ORG file to an .OR2 or .OR3 file before you can upgrade to an Organizer 97 GS file. To upgrade to an .OR2 or .OR3 file, you'll need a copy of Organizer 2.x or Organizer 97. Follow the instructions in the documentation for that product.
- If you're an Organizer Release 2.x or 3.0 user and you want to upgrade or convert your current 2.x or 3.0 files to Organizer 97 GS files, see "Upgrading to Organizer 97 GS," later in this chapter.

Installing Organizer on a stand-alone computer

Before you can use Organizer, you must run the Organizer Install program to transfer Organizer files to your hard disk. Use the installation disks in your Organizer package to install Organizer for the first time. When you install Organizer as a stand-alone application, the Install program stores the files Organizer needs on the hard disk of your computer. This takes up more disk space on your hard disk but it means that your Organizer files will always be available, even if you're not connected to the network.

To install Organizer on a stand-alone computer, run Install from Windows 95.

Note The following procedure assumes you're starting Install from a high-density A drive. If you start Install from a different drive, substitute the letter of that drive in this procedure.

1. Insert the Install disk in drive A.

2. Click the Windows Start button and choose Run.
3. Type **a\:install** in the "Open" box and click OK.
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 enter 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.

Installing Organizer on a network file server

A network file server installation should be performed by a network administrator, or someone familiar with your company's personal computer network, and with the proper level of network access to create directories on the file server.

After you or a network administrator installs Organizer on the network file server, other licensed Organizer users must install a network node directly from the file server. Users choose to use either the Organizer program, report, and layout files on the file server (which requires only 3MB of space on their computer's hard disk), or to fully install Organizer on their computer's hard disk (which requires about 30MB of space) so they'll be able to use Organizer when their computer isn't connected to the network.

Note The following procedure assumes you're starting Install from a high-density A drive. If you start Install from a different drive, substitute the letter of that drive in this procedure.

To install Organizer on a network file server, run Install from Windows 95.

1. Insert the Install disk in drive A.

2. Click the Windows Start button and choose Run.
3. Type **a\:install** in the "Open" box and click OK.
4. Enter your name and company name.
5. Select "File server or multiple user install."
6. Click Next.

7. Install asks you to confirm that the names you entered are correct.
   - Click Yes to enter the names and display the next screen.
   - Click No to return to the previous screen in order to enter the names again.

   Note The company name you enter here will become the company name that appears for all users installing from this file server.
8. Click Next to confirm the file server installation.

   You will be asked to supply additional information and make several configuration choices in the next set of Install screens to complete your network file server installation. Follow the instructions that appear on the screen.

Installing Organizer on a network node

When you install Organizer to run from a network file server on your personal computer (PC) or a notebook computer (laptop), you can choose to store all Organizer files on your computer’s hard disk or use the Organizer files already installed on the network file server. Choosing the latter option takes up approximately 3MB of space on your computer’s hard disk, but you won’t be able to use Organizer when your computer isn’t connected to the network.

To install Organizer on a network node, you can run Install from Windows 95.

1. Click the Windows Start button and choose Run.
2. Type ***x*:*path*\\install** in the “Open” box and click OK.

   x:*path* is the drive letter and path for the Organizer directory on your server. For example, type **n:\\org97GS\\install** to start Install from an Organizer directory named org97GS on drive N.
3. Enter your name in the “Name” box.
4. Click Next.
5. Install asks you to confirm that the name you entered is correct.
   - Click Yes to enter the name and display the next screen.
   - Click No to return to the previous screen in order to enter the name again.
6. Follow the instructions that appear on the screen.

Upgrading to Organizer 97 GS

Organizer 97 GS has two new file extensions, depending on the version of Organizer 97 GS you installed. If you installed Organizer 97 GS for PIM Only (no group scheduling capabilities), your work is saved in a file with the new extension .OR4. When you upgrade a file, Organizer creates an Organizer 97 GS file and leaves the old file in its original format and location. (If you installed Organizer 97 GS for group scheduling, your work is saved automatically as part of your Notes™ mail file, with the file extension .NSF.)

Converting your Organizer 2.x and Organizer 97 files to Organizer 97 GS PIM (.OR4)

In Organizer 97 GS, when you open a file created in earlier versions of Organizer, you're automatically prompted to upgrade or convert your file to the new file format (.OR4). Your original Organizer file still exists in its original format (.OR2 or .OR3) and location.

Organizer keeps the file information in the .OR4 file as it appears in the original version, except for the following information:

- Anniversary entries are set to repeat annually on the same date.
- Included sections from Organizer 2.x or Organizer 97 files aren't automatically included in the new Organizer 97 GS file. Only Organizer 97 GS (.OR4) sections can be included in an Organizer 97 GS file. The conversion process automatically removes included sections from Organizer 2.x (.OR2) and Organizer 97 (.OR3) files.

It's recommended that you compact your Organizer .OR2 or .OR3 file before you convert it to Organizer 97 GS (.OR4).

1. Compact your Organizer 2.x or Organizer 97 file.

   For information about compacting your Organizer file, see "Compacting an Organizer 2.x file" and "Compacting an Organizer 97 file," later in this chapter.
2. Start Organizer 97 GS.
3. Choose File - Open.
4. Click the "Files of type" box, and select either Organizer 2.x (.OR2) or Organizer 97 (.OR3), depending on which release of Organizer you're upgrading from.
5. From the "Directories" box, select the path Organizer must use to select the file you want to convert.

   If necessary, click the "Drives" box to select another drive.
6. Select your file.

7. Click OK to open the file.
8. Click Yes to confirm that you want to convert the file.
9. Click OK when you see the message saying the upgrade is complete.
10. Do one of the following actions to open the file automatically or not when you start Organizer:
    - Click Yes if you want to open this file automatically every time you start Organizer.
    - Click No if you don't want to open this file automatically.

Your Organizer 2.x or Organizer 97 file is now an Organizer 97 GS file with the same name, but with the new .OR4 extension.

Note If you want to reduce the size of this file, you need to archive it. For more information, see "Archiving information," later in this section.

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.

Converting your .OR2, .OR3, or .OR4 files to Organizer 97 GS with group scheduling (.NSF)

You can move information from your Organizer 2.x (.OR2), Organizer 97 (.OR3), or Organizer 97 GS for PIM only (.OR4) files to your existing Lotus 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. During this process, your Organizer Address section(s) will be exported to a local Notes Name and Address book.

Before you can use group scheduling, you must have Notes 4.51 or later workstation software installed on your computer and an existing Notes 4.51 mail file (using the Mail 4.51 template), and you must have Organizer 97 GS with group scheduling installed. For more information, see your system administrator.

After you move 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 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 your Notes documentation or your system administrator.

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.

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 stored 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. After conversion, 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, except for the following information:

- 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.

After your Organizer information is moved to your mail file, you can use Organizer's group-scheduling feature with Organizer 97 GS group scheduling and Notes 4.51.

1. Compact your Organizer 2.x, Organizer 97, or Organizer 97 GS (.OR4) file.

   For information on compacting your .OR2 and .OR3 files, see "Compacting an Organizer 2.x (.OR2) file" and "Compacting an Organizer 97 (.OR3) file" later in this chapter. For information on compacting your .OR4 files, see Chapter 13.
2. (Optional) If you have more than one Organizer Address section, and you want to maintain those separate Address sections, in Notes, create as many local Name and Address Books as you need. Then include the local Name and Address Book(s) in your file. For information on creating a local Name and Address Book, see Notes documentation; for information on including sections, see Organizer Help (online documentation).
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 existing Notes mail file.

   You can also select the file from the list.
7. Click Import to convert the file.
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.

Compacting an Organizer 2.x (.OR2) 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 Organizer will make 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, repeat 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 an 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 Organizer 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, repeat 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.

Archiving information

Organizer 97 GS lets you archive any information in your file that isn't needed on a daily basis, for example, a previous year's appointments or To Do tasks. You still have access to archived information; however, it's stored in a separate file. Archiving streamlines your Organizer file.

Note You can only archive a file for which you have Owner access. If you have Assistant or Reader access, the menu item for Archive is unavailable.

Note For information on archiving your Notes mail file, see Notes documentation or your system administrator.

For more information

For more information on archiving information, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Archiving information
3. Click Display.

What's new?

New group-scheduling features

Organizer 97 GS uses Notes 4.51 or later 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; when you accept an invitation, the meeting is entered into both your Organizer and Notes calendars.

Because of 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 the 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're 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.
- 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.
- 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 user, can view free time and busy time and schedule group meetings with these cc:Mail and Organizer 2.x users. (See your system administrator for information on whether this feature is available at your site.)
- Ability to manually or automatically update the status of To Do tasks in Organizer from your Notes mail file.

Enhancements to PIM and group-scheduling features

Organizer offers its personal information management (PIM) and group scheduling with 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.

General

- The Section Show-through feature is now turned on by default so that all of your To Do tasks, Calls entries, Planner events, and Anniversary entries can be viewed automatically in your Calendar; and all of your appointments can be viewed in your Planner.
- An Organizer Tour that gives you an overview of the product.

- A direct connection to the Organizer home page (http://www.lotus.com/Organizer) through the new Organizer home page icon that’s available in your set of SmartIcons.
- 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 go directly to the Web page (http://www.lotus.com/Organizer/contents) where you can download an expanded and updated Organizer Almanac file (Almanac.OR4 for PIM users; Almanac.NSF for group scheduling users). Consult 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.
- 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.

Chapter 3
Getting to Know Organizer

Organizer uses the metaphor of a notebook to help you manage tasks you do everyday, such as keeping track of appointments, making lists of things to do, and making notes on phone calls you've made or need to make. It's like a paper-based day planner you may already use to manage your time. For example, Organizer uses tabs that you can turn much like tabs in an ordinary paper day planner. However, with Organizer, your work is in an electronic notebook, which allows you to access and manipulate your information more quickly and more efficiently.

With Organizer, you create a customized calendar to track your meetings and appointments, as well as manage to do lists, long-range events, and anniversaries. Organizer's group-scheduling capabilities work with Notes 4.51 to enable you to set up group meetings with coworkers around the globe. You can store contact information in the Address section and also track phone calls for those contacts. Notepad provides a way to capture important text or graphics or store information from other documents and applications. In addition to managing information in separate sections, Organizer lets you see the big picture. You can view all time-related information (To Do, Planner, Anniversary) separately in each section, or together in Calendar. Any entry can be linked to other entries, so you can easily connect Calendar appointments with a client's Address record and directions to the client's site on a Notepad page. Plus, all your information can be printed in over two dozen print layouts, such as a monthly calendar, trifolds (information from several sections), address labels, and task lists.

You can also use Organizer to share calendars, task lists, address books, and other information across your local area network (LAN) with your workgroup. You can even e-mail Organizer entries to coworkers by using TeamMail.™

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 you installed it.

Tip To open Organizer automatically whenever you start Windows 95, drag the Organizer icon to the Windows Startup group in the Program Manager.

Note If you're using Organizer 97 GS with group scheduling, it may be necessary to enter your password.

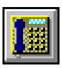
Organizer sections

The Organizer notebook contains the seven sections: Calendar, To Do, Address, Calls, Planner, Notepad, and Anniversary. Switch from one section to another by clicking the tabs. You can also include two or more copies of a section in your Organizer file. To learn more about adding sections, see Chapter 5. To learn about each Organizer section, see Chapters 6 – 12.

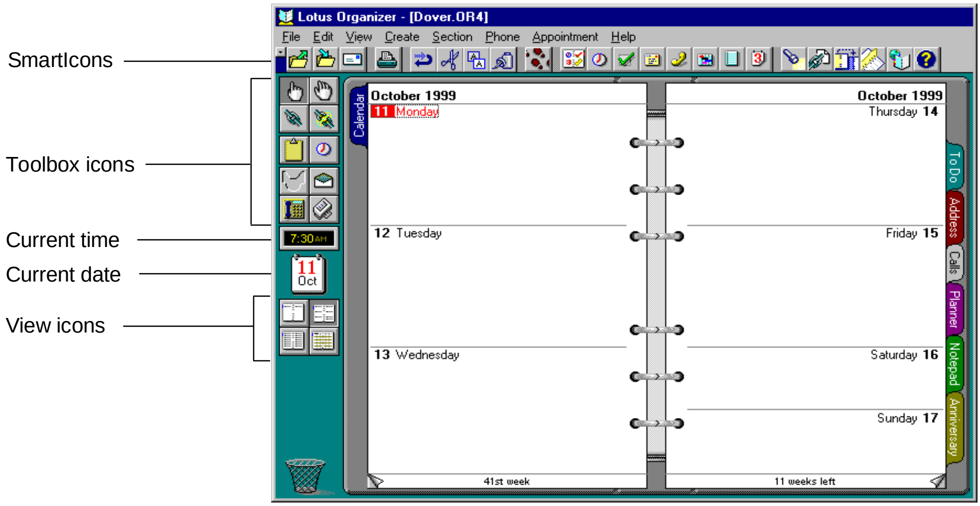
Icons, mouse pointers, and Organizer symbols

Toolbox icons and SmartIcons provide shortcuts for performing Organizer tasks. To use Toolbox icons and SmartIcons, position your mouse pointer on the icon and click the left mouse button.

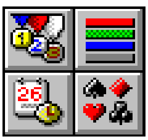
Toolbox icons



Toolbox icons let you perform Organizer-specific tasks. For example, you can drag a phone number from your Address section to the Phone icon, and Organizer automatically dials the phone number, if you've installed and set up a modem.



Toolbox icons appear on the left side of the Organizer workspace. You can drag and drop an Organizer entry to the Toolbox icons.



The View and Sort icons let you display entries in different ways. For example, in the To Do section, you can view entries by the priority you assign the entries (such as “1,” “2,” “3,” and None), by the status you assign the entries (such as Current, Completed, Overdue, and Future), by a start date you assign the entries, or by the category you assign the entries (such as “Expenses”).

The View and Sort icons change depending on what section you’re in. Go from section to section (by clicking the section tabs) to see how these icons change. When you’ve included entries in some of these sections, click one of these icons to see how it affects the entries. When you click one of these icons, you’re only changing how or what information appears. You won’t lose any information you added.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Toolbox icons, list

3. Click Display.

SmartIcons

SmartIcons let you perform Organizer and other common Lotus application tasks. When you first start Organizer, a set of SmartIcons appears above your Organizer notebook. You can customize which SmartIcons appear in your set. You can change the location of the SmartIcons bar so the set appears along the bottom of your screen, on either side, or wherever you choose to drag it.

For more information

For more information on where your set of SmartIcons appears, what SmartIcons you want in your set, and so on, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type **SmartIcons** and make a selection by clicking a topic.
3. Click Display.

Mouse pointer shapes and Organizer symbols

In Organizer, the mouse pointer can assume various shapes. Shapes change according to what you're doing. Also, you can animate mouse pointers.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Mouse pointer, list of
3. Click Display.

What's available for online Help

Organizer has online information called Help. Help is organized by task; it provides procedures and overviews that give you general information. Help is concise and oriented toward helping you complete tasks.

There are several ways to access Help:

- Choose Help from the main menu.
- Display bubble help for single-line descriptions of areas of the Organizer screen.
- Display context-sensitive Help for information specific to what you're doing or what appears on the Organizer screen.

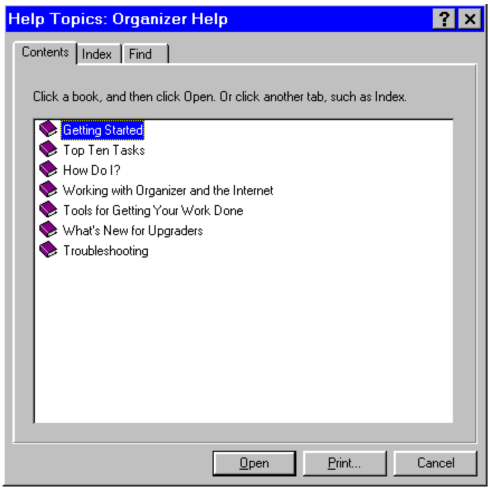
You can display and work in your current Organizer file while a Help window is open. You can also resize, move, tile, or cascade the Organizer window or the Help window to make it easier to display and follow Help procedures while you're working in your Organizer file.

Choosing Help from the Help menu

When you choose Help - Help Topics, the Help window called "Help Topics: Organizer Help" appears. There are three tabs for three different methods of accessing Help information: Contents, Index, and Find. Click the tabs to switch to the different methods of accessing Help.

Using Contents

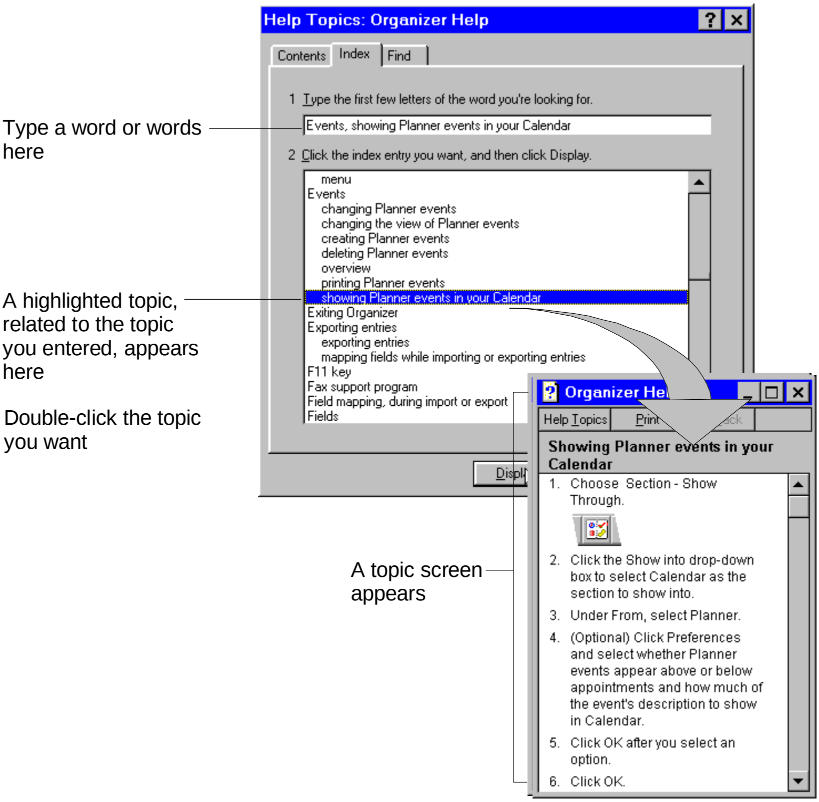
Contents lets you browse through topics in Help much like a table of contents in a book. Contents provides the following top-level topics: Getting Started, Top Ten Tasks, How Do I?, Working with Organizer and the Internet, Tools for Getting Your Work Done, What's New for Upgraders, and Troubleshooting.



When you double-click a topic, you will either see more topics to select or a procedure for the topic you selected. For example, if you double-click Getting Started, a number of topics appear below it. If you then double-click The Organizer workspace, a Help window appears with information about the Organizer workspace.

Using Index

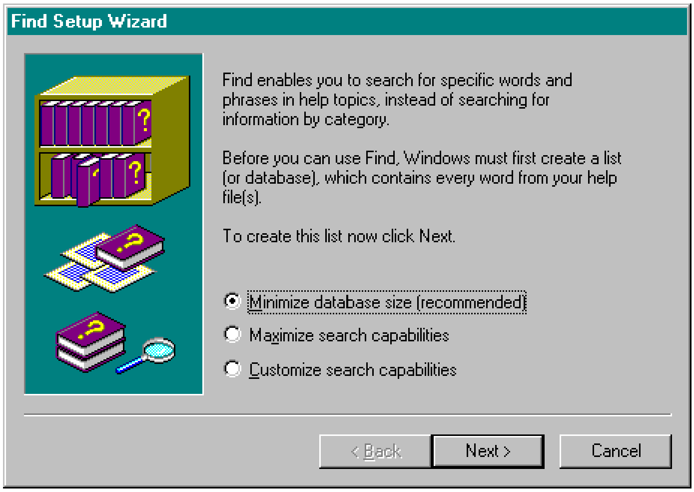
Index lets you search for information. You can type a single word, or part of a word in the top box. Index lists topics pertaining to the word or words you typed in the box that appears below.



After you select a topic, use the buttons at the top of the Organizer Help window to get around. You can either click Help Topics to go back to the Help Topics screen, click Print to print the current topic, or click Go Back to return to the previously selected Help topic.

Using Find

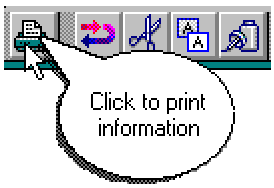
Find lets you search for words or phrases in Help topics. Read the information in the window and make the selection that best suits you. Then click Next and follow the instructions.



You use Find in much the same way you use the Index. However, the Find screen offers broader query options for your search.

Displaying bubble help

Bubble help describes items on your screen. To find out what an icon does, rest your cursor on the icon and a description appears.



To turn bubble help off or on, choose Help - Bubble Help or press **CTRL+F1**. When you move over an area of the screen for which bubble help is available, the mouse pointer turns into a dialog bubble with a description of the screen area.

Getting context-sensitive Help

Organizer provides Help based on the function or command you're using. If you want an overview of an Organizer section, move to the section and click the Help icon or press **F1**. Organizer displays a Help topic overview about the section.

If you want to see context-sensitive Help for an Organizer command, choose the command and click the Help icon or press **F1**. Organizer displays a list of the commands (or menu items) with a description of what each command does. Where appropriate, Help includes cross-references to steps that explain how to use the command.

If you're in an Organizer dialog box, you can click the Help command button or press **F1** for a set of steps that explain how to use the dialog box.

Working with Organizer files

Organizer 97 GS has two new file extensions, depending on the version of Organizer 97 GS you installed. If you installed Organizer 97 GS for PIM Only (no group scheduling capabilities), your work is saved in a file with an extension .OR4. If you installed Organizer 97 GS for group scheduling, your work is saved automatically as part of your Notes mail file, with the file extension .NSF. For more information about installing and converting files for different versions of Organizer 97 GS, see Chapter 2.

In Organizer 97 GS for PIM, you can open an Organizer 2.x (.OR2) file or an Organizer 97 (.OR3) file, but you can't open an .OR4 file in Organizer 2.x or Organizer 97. For information about converting files from previous Organizer releases, see "Upgrading to Organizer 97 GS," in Chapter 2.

In Organizer 97 GS group scheduling, you work in your Notes mail file (for example, MAIL.NSF). You can open only Notes databases in Organizer 97 GS group scheduling, and any Notes database you open must use the MAIL45.NTF template. Additionally, you can't open an Organizer 97 GS PIM (.OR4) file, an Organizer 97 (.OR3) file, or an Organizer 2.x (.OR2) file directly in Organizer 97 GS group scheduling. You must choose File - Import to convert information in these files to your Notes mail file. For more information, see "Converting your .OR2, .OR3, or .OR4 files to Organizer 97 GS with group scheduling (.NSF)" in Chapter 2.

Working with your PIM (.OR4) files

The following File Menu commands are available when you use .OR4 files:

Creating a new file

1. Choose File - New.

   If you already opened and saved the file, Organizer closes the current file and opens a new untitled file.

   If you already opened but haven't saved the file, Organizer prompts you to save the open file before creating a new file.

2. Click one of the following buttons:

   - Yes to save your changes to the file, close the current file, and then open the new file. If the file doesn't exist on disk, the Save As dialog box appears and lets you enter a file name.
   - No to close the current file without saving your changes and open a new file.
   - Cancel to return you to the current file.

Note You create new Organizer 97 GS group-scheduling 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.

Opening an existing .ORX file

If you saved a file already, you can open an existing file.

1. Choose File - Open.
2. (Optional) Click the “Files of type” box to change the type of file Organizer lists.
3. Click the “Look in” box to select the path and file name you want.
4. Select a file to open.
5. Click Open.
6. If the file you selected has a password assigned to it, enter the password and click OK.

   See “Using passwords to protect your files,” later in this chapter, for information on passwords.
7. (Optional) If you’re opening a file from a previous release of Organizer, Organizer asks if you want to convert the file to an Organizer 97 GS (.OR4) file. Click one of the following buttons:
   - Yes to convert the file to an Organizer 97 GS (.OR4) file.
   - No to return to the active file without opening the new file.

   See “Upgrading to Organizer 97 GS” in Chapter 2 for information on converting files from previous Organizer releases.

   Organizer opens the file.

Quickly opening files you previously saved

Organizer lists the last five files you saved at the bottom of the File menu. To open these files, choose File and then choose the file you want.

Recently saved Organizer files to choose from

Saving a new file

1. Choose File - Save.
2. Enter a new name in the “File name” box.

   You can select different drives and directories in which to save the file using the “Save in” box.
3. (Optional) If you want to protect the file with a password, click Passwords, select the “Owner” box, and enter a password.

   See “Using passwords to protect your files,” later in this chapter, for more information on setting passwords for Owner, Assistant, and / or Reader.
4. Click OK.

   If you enter a file name that already exists, Organizer asks whether you want to replace the existing file with the current file.
5. Click one of the following buttons:
   - Click Yes to replace the existing file with your current file.
   - Click No to return to the Save As dialog box.

Note You can save a version of your group-scheduling file with a different name by creating a copy of your mail database in Notes. To do this, in Notes, choose File - Database - New Copy. For more information, see Notes documentation.

Saving a file

To quickly save a file to its current name and directory choose File **-** Save or click the File save icon.

Note Since group scheduling uses a Notes mail database or a Notes Name and Address database to store Organizer information, changes are automatically saved to your .NSF database.

Saving a file to another name

1. Choose File **-** Save As.
2. In the "File name" box, enter a different file name.
3. Click OK.
4. If you enter a file name that already exists, click No to cancel saving the file or click Yes to replace data in the existing file with the data in the current file.

Note You can save a version of your group-scheduling file with a different name by creating a copy of your mail database in Notes. To do this, in Notes, choose File - Database - New Copy. For more information, see Notes documentation.

Working with your group-scheduling (.NSF) files

The following File Menu commands are available when you use .NSF files:

Opening an Organizer group-scheduling file by user name or database name

1. Choose File - Open.

   Tip You can also press **CTRL+O** to open an Organizer file.

2. If you want to open a file by user name, click the Names tab and select the file you want to open.

   You can also 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.

3. If you want to open a file by database name, click the Database tab, select the server, and enter the 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.

4. Click OK.

5. 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.

Using passwords to protect your file

You can use passwords to protect your file so that other users can't open your file. You can also use passwords to allow different types of access to your files, or how much information others can see or change in your file.

Setting passwords for a file

When you create a password for a file, you must enter that password to open the file. Any other user to whom you give a password must also enter the password to open the file.

You can set three types of access when you set passwords for a file: Owner, Assistant, and Reader. You must give the password to those you want to be able to access your file with the particular access right. For example, if you used "Antioch" as a Reader password, give this password to any users you want to have Reader access to your file.

Note Setting passwords isn't applicable to group-scheduling (.NSF) files. You set a password for your Notes mail file in Notes.

1. Open the file for which you want to set a password.
2. Choose File - Save As.
3. Click Passwords.

   Note Enter a password for each type of access you want to give a user.

Option	*Result*
Owner	Lets a user see and change all entries (including entries marked confidential) in and preferences for a file. Owner access lets a user set the type of access and passwords for other users. If you don't enter an Owner password, the file isn't protected by a password and anyone who either gets a copy of your file or accesses it from a network can view your file and make changes to it. If you give someone else Owner access along with you, they can view all the contents of your file, make changes to your file, as well as change all passwords. It isn't recommended that you give anyone else Owner access to your file.
Assistant	Lets a user see and change entries (except entries marked confidential) in and preferences for a file. Assistant access lets a user schedule appointments and change preferences but won't let a user view or change entries that are confidential. Assistant access doesn't allow a user to change passwords for the file. You can't archive a file for which you have Assistant access.
Reader	Lets a user see, but not change, entries in a file that aren't confidential. You can't archive a file for which you have Reader access.

Note If you're entering passwords for the first time, you must enter them in order; that is, Owner before Assistant, and Assistant before Reader. After you enter a password for Owner access, press **TAB** to highlight the Assistant password field and enter a new password. Press **TAB** again to highlight the Reader password field and enter a new password.

4. Click OK.
5. Confirm the password by entering it again.
6. Click OK to confirm the password.
7. Click OK.

Note All passwords are case-sensitive. For example, Hope with a capital H and hope with a lowercase h are two different passwords.

For more information

For more information on changing or removing a password, refer to Help (online documentation).

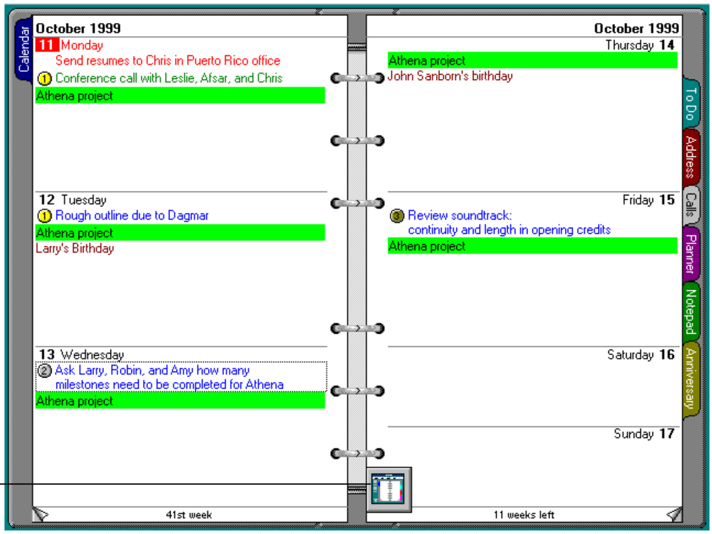
8. Choose Help - Help Topics, and click the Index tab.
9. Type one of these phrases:

   Passwords, changing

   Passwords, removing
10. Click Display.

Enlarging your Organizer desktop

You can enlarge or maximize your Organizer desktop and hide Windows controls from the screen by using Clean Screen. When you use Clean Screen, Organizer removes the title bar, menu, Toolbox icons, SmartIcons, Trash, and vertical and horizontal scroll bars so that you have the whole screen to view and edit your Organizer notebook.

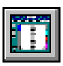


Click the Clean Screen icon to restore Windows controls

With 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.**

1. Choose View - Show Clean Screen.

   Tip You can also press **F11**.

   An icon appears in the center of the screen when you maximize the screen. You can drag the icon to change its location on the screen.

2. Click the Clean Screen icon to redisplay the Windows controls.

   Tip You can also press **ALT+V** and deselect Show Clean Screen, or press **F11** to redisplay the Windows controls.

Ending an Organizer session

1. Choose File - Exit Organizer.

   Tip You can also press **ALT+F4** to leave Organizer.

   If you made changes to a file you didn't save, you're prompted whether to save the changes or not.

2. Click one of the following buttons:
   - Yes to save your changes before exiting Organizer.
   - No to discard your changes and exit Organizer.
   - Cancel to remove the dialog box and continue to work in Organizer.

Note Changes you make to your group scheduling file are automatically saved as you work on your file.

Chapter 4
Printing Your Work

Organizer lets you print your Organizer information (or the entries you created) in a variety of professional ways. You can print your work on papers that fit a day-planner you use (for example, a Franklin Day Planner Classic or Day Runner Classic), or you can customize your own look. You can print entries from one or several Organizer sections, or select specific entries you want to print. 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, events, notes, calls, and special dates, or you can print only your day's appointments and responsibilities, so you can take them to a meeting.

This chapter first explains terms, then explains how to print your work and select layouts and paper types, and last, how to select a printer.

Understanding basic printing concepts in Organizer

When you're ready to print, you can select the print layout (or how you want your information to appear on the printed output) and the paper type (or the paper size) you want, and then select any Organizer section (or any information from the section) you want to print.

Organizer print layouts

What you print reflects the layout you select rather than what you see on your computer screen. Print layouts let you customize what you want to 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, including specific layouts associated with each Organizer section, such as a label layout to print your Addresses. You can also select a layout that includes information from more than one Organizer section or a layout that matches your paper datebook. In most cases you won't need to change the predefined layouts; however, you can customize these layouts as well.

Organizer paper types

The other selection you'll commonly make is the paper type to use. 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 8½ x 11" letter paper size, a Rolodex card size, an 8½ 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.

Printing Organizer information

There are many ways to print your Organizer information. You can print your day's activities, print information from any section, and print Organizer information for different paper datebooks.

Printing your day's scheduled activities

You can print your scheduled activities for a day, or you can print a combination of appointments, tasks, and Calls entries on one 8½ x 11" page.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, Calendar appointments
3. Click Display.

Printing multiple calendars

If you choose to view multiple calendars in your Organizer file, you can print the entries from the multiple calendars all on one 8½ x 11" piece of paper.

1. Choose File - Print.

   Tip You can also press **CTRL+P**.
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 8½ 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.

Printing information from any Organizer section

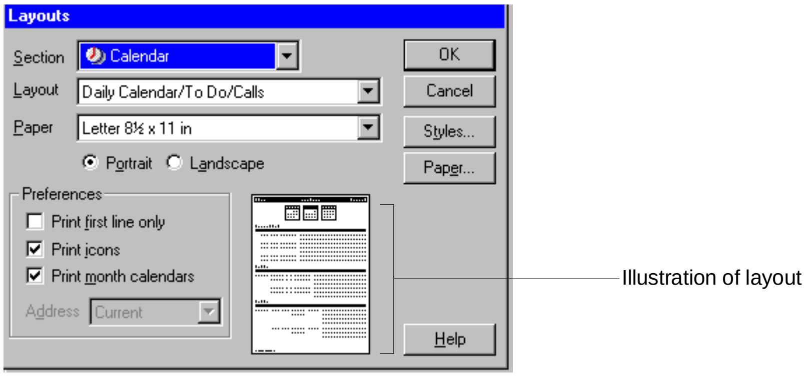
1. Choose File - Print.

Tip You can also press **CTRL+P**.

2. Click the "Section" box and select the Organizer section that contains the information you want to print.

3. Click the "Layout" box and select the layout in which you want your printed information to appear.

To see an illustration of the layout you select, click Layouts. The illustration appears next to "Preferences." Click OK to return to the Print dialog box. See the "Print Layout Guide" for illustrations of all layouts available in Organizer.



The layouts available to you are designed for the section you select. For example, the layouts for addresses include envelope and label. Some layouts are also designed to combine several sections on one printout. For example, the trifold layouts print your Calendar, To Do, Planner, Calls, and Anniversary entries all on a single printout.

If you're printing the Calendar section and you've selected to show through entries from the To Do, Planner, Calls, or Anniversary section in Calendar, you can print the shown-through entries along with your appointments. To do this, select one of the following layouts: "Monthly Calendar," "Daily Page," or "Weekly 2-Page."

4. Click the "Paper" box and select a paper type.

To see an illustration of the paper style and type you selected, click Layouts, then click Paper. Click OK and click OK again to return to the Print dialog box.

5. Select "Single sided" to print on one side of the page or "Double sided" to print on both sides of the page.

See Help for more information on double-sided printing options.

6. Under “Range,” select the option for what range of information you want to print.

   See Help for more information on selecting a range of information 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 layout that prints information from multiple sections (one of the trifold layouts), click Sections to select how you want to map your Organizer sections, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section.

   See Help for more information on mapping sections.

9. Click OK to start printing.

   Note If, after you make 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.

Tip You can also print an Organizer entry by dragging and dropping the entry to the Printer icon in Toolbox.

Printing information for different paper datebooks

You can print your Organizer information to fit a specific datebook paper that’s already preprinted, such as Franklin Day Planner Classic.

Specifying a range of information you want to print

You can print all the pages of a section, or you can specify a range to print.

For more information

1. Choose Help **-** Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, specifying a range of information you want to print

3. Click Display.

Mapping sections

You can add or create additional sections of Organizer. If you added an Organizer section, you'll have more than one of the same sections in your Organizer file. For example, let's say you included both your manager's and your own To Do section as part of your Organizer file. If you're printing just one of these sections, you can select the section you want to print.

You can only print one section at one time. If you select a trifold layout, you need to specify (map) which section (your or your manager's To Do tasks) you want to print in the To Do part of the layout. If you don't specify the mapping, Organizer prints information from the section that appears first in your Organizer file. That is, if your To Do tab appears before your manager's To Do tab, Organizer will print your To Do tasks first — unless you specify the manager's To Do tasks as the section to print.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Mapping sections, when printing
3. Click Display.

Stopping printing

You can stop printing at any time that the Printing dialog box appears by clicking Cancel.

Customizing print layouts, layout elements, and paper types

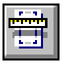
You can customize what you print (by selecting a print layout) and the paper size you print to (by selecting a paper type).

Organizer includes many layouts, and in most cases you won't need to change them. You may want to customize a layout to change its orientation on the printed page and to specify what and how much information you want to print. You can also change certain aspects of a layout, called **elements**, such as the header, footer, page number, column headings, grid lines, or the text font. Changing layouts is optional. If you don't change a layout, Organizer uses the default.

In most cases you won't need to customize the predefined paper types that come with Organizer. But for those times when you do, you can customize various aspects of a paper type, such as the margin size, paper size, number of columns, and column widths.

Customizing print layout options

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.

Option	*Result*
Portrait	Prints information across the width of the page.
Landscape	Prints information across the length of the page.

5. Under “Preferences,” select the options you want.

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 symbols that appear with entries, for example, the alarm symbol or repeating entry symbol.
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 whichever record currently appears in the foreground in the Address section.

6. If, after you make 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.
7. Click OK to save your changes.

The layout changes will be in effect the next time you print using that layout.

Tip You can also customize print layout options by choosing File - Print, selecting the section and layout, clicking Layouts, and then customizing the layout.

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 the default settings for these elements, but you can change them. For example, you can change the font color of a title, add a patterned background to column titles, or include a code that prints the current date in the footer.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, customizing layout styles

3. Click Display.

Changing the font size, font type, and font color for printing

You can select a font for any text element, for example, a header or footer in a print layout. A **font type** is a particular lettering style, or typeface (for example, Helvetica) with a particular size, such as 12 point. The fonts available to you often depend on the printer you selected, and whether or not you installed additional fonts in the Fonts folder in the Windows Control Panel.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, selecting fonts

3. Click Display.

Customizing paper types

Organizer comes with a number of predefined paper types, which in most cases you won't need to customize. But for those times when you do, you can customize aspects of a paper type, such as the margin size or paper size. Changing paper type settings is optional. If you don't change the settings, Organizer uses the default paper type.

Caution If you make changes to a default paper type and want to keep the original paper type settings, save the changed paper with a new name.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, customizing the paper settings

3. Click Display.

Selecting global printing options

Global printing options let you select preferences that affect all of your printed work. The changes you make stay in effect until you change them again. For example, you can set Organizer to always print in black and white, or always print on both sides of your paper. You can also select the number of copies to print. Some global printing options are only available for certain paper types: for example, selecting the order that your information prints is only available for paper types that include rows and columns, such as labels.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Printing, blank entries

   Printing, information in a selected order

   Printing, in black and white only

   Printing, double-sided print options

   Labels, selecting printing options
3. Click Display.

Selecting the number of copies to print

By default, Organizer prints one copy of any information you print. You can print up to 99 copies in a single printing.

1. Choose File - Print.

   Tip You can also press **CTRL+P** to change the number of copies.
2. For Copies select the number of copies you want to print.

   Click + (plus) to increase or - (minus) to decrease the number of pages. You can also highlight the number in the “Copies” box and then enter another number for the copies you want.
3. Click OK to start printing.

Printing in portrait or landscape orientation

By default, the layout you select determines the orientation. You can change the print orientation when you print Organizer information.

1. Choose File - Print.

   Tip You can also press **CTRL+P** to select the printing orientation.

2. Click Setup.
3. Select one of the following options.

Option	*Result*
Portrait	Prints information across the width of the page.
Landscape	Prints information across the length of the page.

4. Click OK.
5. Click OK to start printing.

Selecting printer setup options

You can change various printer setup options. The options available to you are specific to the printer drivers you installed on your system, and differ from printer to printer. See your printer documentation for specific information on your printer.

Note The selections you make when you choose File - Print (in the Print, Layout, and Paper dialog boxes), override the options you select in the Printer Setup dialog box. For example, the paper size and orientation you select in Organizer take precedence over the printer setup options you select.

1. Choose File - Print.

   Tip You can also press **CTRL+P** to select printer setup options.

2. Click Setup and make your changes.

   To display Help for an option in this dialog box, click ? (question mark) in the top-right corner of the dialog box, then click the option or command button.

3. Click OK until you exit all the Setup dialog boxes.
4. Click OK to start printing.

Selecting a printer

Before you can print information from Organizer, you need to select your printer. Organizer uses the default printer specified in the Printers folder in the Windows Control Panel unless you select another printer. In many instances, the printer you select determines the fonts and other options available to you when you print.

For more information

1. Choose Help **-** Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, selecting printers
3. Click Display.

Chapter 5
Customizing Your Organizer Notebook

Organizer comes with seven standard sections: Calendar, To Do, Address, Calls, Planner, Notepad, and Anniversary. You can add additional Organizer sections and rename sections as you like. For example, you can create one Notepad section for meeting notes and another for travel information. You can also reorganize your Organizer sections.

You can use Organizer sections to build complete books of information that are specific to your work. For example, you can create a corporate Organizer notebook, called “Policy,” that’s accessible to all employees or a personal journal that contains your personal goals and strategies. You can create each notebook as a separate section in one Organizer file, or you can create separate files: one called POLICY.OR4, the other called JOURNAL.OR4.

Customizing your Organizer binder

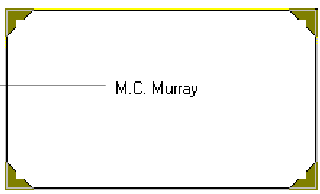
You can change the appearance of your Organizer binder to reflect your personal style.

Changing the name of your Organizer binder

You can personalize the name of your Organizer binder by adding text to the front page. For example, you might include your name, company name, and address. When you save your file, these changes are saved.

1. Click the inside of the front cover of your Organizer binder.
2. Click inside the label area on the first page of the binder.

Click here and enter your information.



3. Enter any text that you want to appear.

Changing the color and texture of your binder

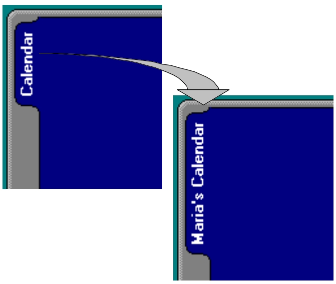
1. Choose Section - Customize.
2. Click the Book tab.
3. Under “Binder,” click the Color box and select the color you want.
4. Click the “Texture” box and select the texture pattern for your binder.
5. Click OK.

Customizing your Organizer file

Organizer lets you customize your individual Organizer files. You can change a section name and the order of section tabs, choose the color, position, size, and width of section tabs, and display a picture on a section divider. You can also add and delete sections, or decide what Organizer section you want Organizer to automatically open to when you start Organizer. The changes you make affect only the current file.

Changing the name of an Organizer section

The name of a section appears on the section tab.



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 this section.

   For example, type **Maria’s Calendar** if you want to rename the Calendar section Maria’s Calendar.
5. Click OK.

   The new section name appears under “Tabs.”
6. Click OK.

Adding a new Organizer section

You can add new Organizer sections, and you can create an unlimited number of sections in one Organizer file, provided the file doesn't exceed the maximum 4GB (4000MB) file size.

Note If you're using Organizer 97 GS with group scheduling (.NSF), you must have at least Editor access with the right to "Create shared folders/views" in the Notes mail file where you want to add a section. For more information on granting access to Notes mail, see Notes Help.

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 Organizer section you want to add.
5. For "Section name," enter a name for the section you want to add.

   For example, **Amy's Tasks**.
6. Click OK.

   The new section name appears in the list under "Tabs."
7. Click OK.

Changing the order of your Organizer sections

When you change the order of your Organizer sections, you change the position of the section tab in your binder.

1. Choose Section - Customize.
2. Under "Tabs," select the section tab you want to reorder.
3. Click Up or Down to move the section tab up or down the list.
4. Click OK.

Changing the color of an Organizer section tab

1. Choose Section - Customize.

2. Under "Tabs," select the section tab whose color you want to change.
3. Click the "Color" box and select the color you want for the section tab.
4. Click OK.

Changing the size of an Organizer section tab

You can change the size of an Organizer section tab to display more or less of the contents on the tab.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Tabs, changing the size or width of
3. Click Display.

Setting your Organizer file to open to a particular section

You can choose where you want your binder to open to 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's date in Calendar or to the Organizer front cover, if no Calendar section exists.
4. Click OK.

For more information

To learn how to change font size, delete section tabs, or to add a picture to a section divider page, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Changing, font sizes

   Removing, sections

   Changing, picture for a section
3. Click Display.

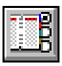
Customizing Organizer preferences

Organizer preferences are options you select that affect how Organizer opens and saves files and folders, and how the Organizer environment appears and functions.

The default file options you select determine which Organizer file will open automatically when you start Organizer, and whether new Organizer files will be based on an existing one. The environment options you select determine whether to display the clock and today's date; how your mouse pointer appears and acts; what your favorite alarm tune is; and what sound you want associated with what action. The folders options you select determine the paths and directories used to store similar Organizer information. For example, you can store Organizer files in one folder and paper layouts in another. Finally, the save options you select determine whether Organizer will automatically save your file and when.

Selecting an Organizer file to open automatically

Note Selecting a particular file to open automatically isn't applicable to group-scheduling (.NSF) files; the group-scheduling mail file opens automatically each time you open Organizer 97 GS.



1. Choose File - User Setup - Organizer Preferences.
2. Select one of the following options.

Option	*Result*
Automatically open	Automatically opens the file you specify.
Always start with a new Organizer file	Automatically opens a new Organizer file (default).

   If you select "Automatically open," you can enter the name of the .OR4 file directly in the box or you can click Browse to see the Organizer files available to you. Select the file you want and click Open.

3. (Optional) For "Base new Organizers on," enter the name of a file to create new Organizer files from.

   For example, you can base new Organizer files on an existing file whose sections and colors you've customized. Click Browse to see the Organizer files available to you. Select the file you want and click Open.

4. Click OK.

Changing Organizer display settings

Display settings determine whether or not the clock and today's date appear in Organizer, and whether animated pages turn when you click the page-turner symbols. By default, Organizer displays the Clock and Today's date icons in Toolbox, and page-turner symbols appear so you can turn the page by clicking them. You can choose whether or not to use these display settings.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Display options, changing

   Preferences, changing alarm

   Preferences, changing display

   Preferences, changing mouse pointer

   Preferences, changing sound
3. Click Display.

Changing Organizer paths

Paths are used to specify the directories (folders) where you want to store similar kinds of Organizer information. You can select one folder for your Organizer files, another for print layouts, another for icons, and another for backup files. You can change the defaults to suit your needs.

Let's say you want separate directories for your business and personal Organizer files; for example, \ORGANIZER\ORGFILES\WORK and \ORGANIZER\ORGFILES\HOME. You can change the Organizer files directory to\ORGANIZER\ORGFILES\HOME when you want to work with your personal files; you can change the Organizer files path to \ORGANIZER\ORGFILES\WORK when you want to use your business files.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Paths
3. Click Display.

Changing automatic save and backup preferences

You can automatically save your files after each change or at the interval of time you specify. For example, you can have Organizer save your file after each change, only when told, or every so many minutes (depending on a number you specify). You can also specify that when you open a file, Organizer creates a backup file with the same file name and extension in the backup directory. Then, if you accidentally save changes to the file, you can restore the previous version.

Note Changes you make to your group-scheduling (.NSF) file are automatically saved as you work on your file.

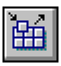
For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, save interval
3. Click Display.

Changing the set of SmartIcons you want to display

Organizer has five default sets of SmartIcons: Universal (default), Working Together®, Text, OLE, and Internet. Each of these sets of SmartIcons are related and provide you with quick access to many Organizer tasks.



1. Choose File - User Setup - SmartIcons Setup.
2. Under “Bar to set up,” click the “Bar name” box and select the set of SmartIcons you want to display.

   Organizer lets you choose from the following default sets of SmartIcons; however, you can create and then choose a custom set of SmartIcons. See Help for more information on how to create a custom set of SmartIcons.

Option	*Result*
Internet	Lets you go to Internet pages (addresses), for example, the Lotus Home Page.
OLE	Lets you insert objects and access the Manage Links dialog box.
Text	Lets you set font sizes, font styles, and alignment. Use this set when you edit a Notepad page.
Universal	Lets you perform most Organizer menu commands (default).
Working Together	Lets you start other Lotus SmartSuite® applications, if they’re installed.

3. Click the “Bar can be displayed when context is” box and select the option you want.

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

4. If you want the selected set of SmartIcons to display at specific times, select the “Bar is enabled to display during its context” option.

   This option works in conjunction with your selection to control which set of SmartIcons appears when you edit Notepad pages.

5. Click OK.

For more information

To learn how to position a set of SmartIcons, change the size of SmartIcons, add a set of SmartIcons, customize your own set of SmartIcons, delete a set of SmartIcons, create a new icon, or change an icon, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

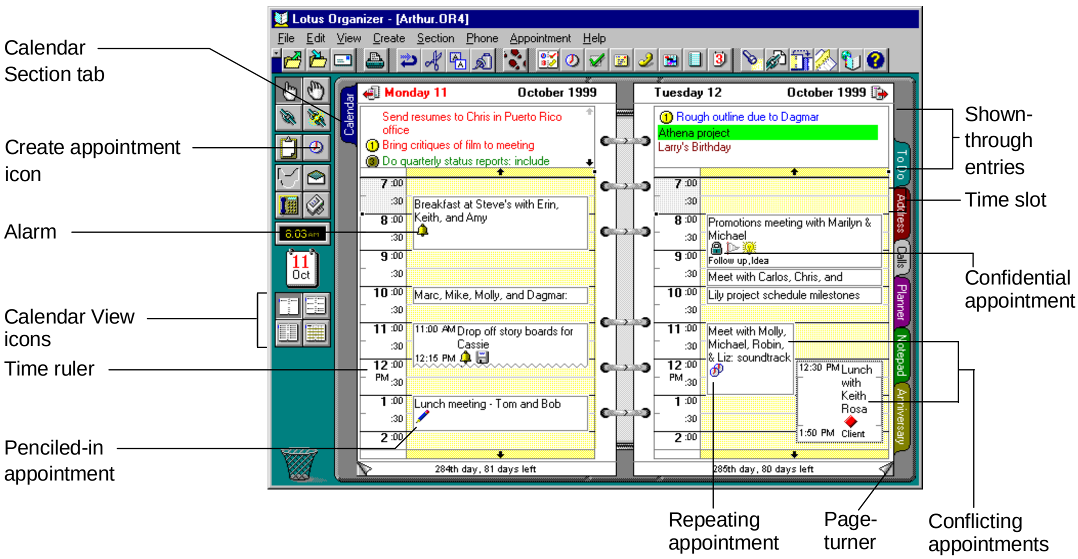
   SmartIcons

3. Select the index entry you want, and click Display.

Chapter 6
Managing Your Time with Calendar

The Calendar section lets you manage your time and view appointments at a glance. Entries you create in Calendar are called **appointments**. With Calendar, you can create and change appointments, set alarms to remind you of appointments, and create tentative appointments. Organizer even helps you find time in your Calendar when you try to book a conflicting appointment and lets you display two or more calendars side by side so you can review your calendar and another user's calendar at the same time.

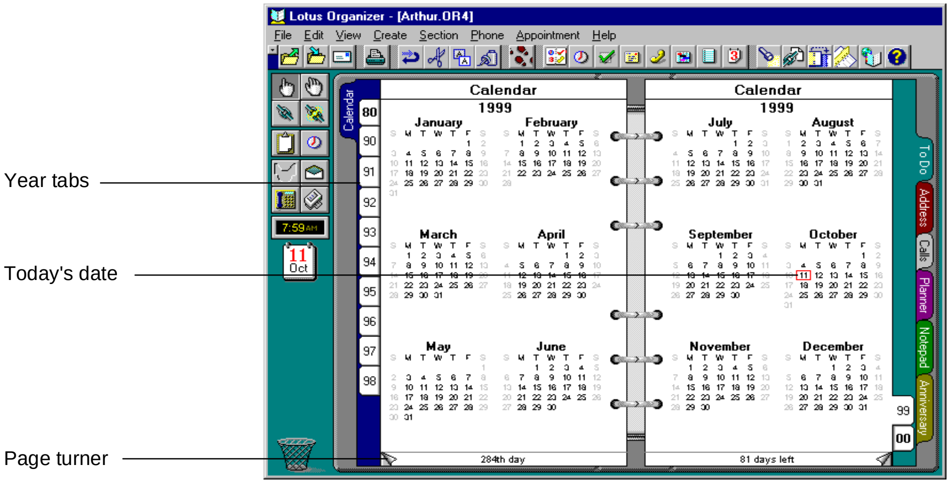
Organizer also lets you show information in Calendar from other Organizer sections, so that you can see your upcoming commitments in the context of your daily work. For example, you can see To Do tasks you need to complete and calls you need to make, along with your appointments.



Moving around your 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 sides of the calendar.



2. (Optional) To display the Calendar for a different year, 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 you want to go to.

Tip To go directly to today's date, click the Today's date icon in Toolbox. To move around when you're viewing Calendar, turn your page by clicking the page turners in the bottom-left and bottom-right corners.

Correcting the time for Today's date and Clock icons

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.

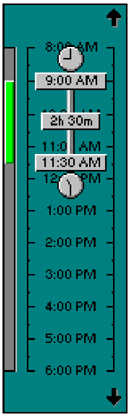
Creating a Calendar appointment

1. In the Calendar section, double-click the Calendar page.

   Tip You can also choose Create - Appointment or press **INS** when you're in the Calendar section to create an appointment.

   In the Day per Page view, if the appointment time slots are displayed, you can click an appointment time or a time slot and start entering information for that time. See "Viewing your Calendar appointments," later in this chapter, for information on displaying the Day per Page view. See Help for more information on displaying time slots.

2. If necessary, click the "Date" box and select a date for the appointment.

   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.

3. If necessary, click the "Time" box to use time tracker and select a time for the appointment to start and end.

   If necessary, under "Duration," specify the duration of the appointment by clicking the + (plus) to increase or the - (minus) to decrease the duration of the appointment.

4. Under "Description," enter a description of the appointment.

   For example, "Staff meeting," or "Interview with Erin McIntyre."

5. (Optional) Click the "Categories" box and select a category for your appointment. See Help for more information on categories.

6. Select the options you want.

Option	*Result*
Warn of conflicts	Alerts (default) or doesn't alert you when there's a conflict with the appointment and another appointment or meeting.
Pencil in	Enters a tentative appointment.
Confidential	Makes or doesn't make (default) the appointment 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. See "Sharing your files," later in this chapter, for more information.

7. (Optional) Click Alarm to set an alarm for your appointment, click Repeat to make an appointment repeat at intervals you specify, and / or click Cost to assign a customer and cost code to your appointment.

See Help for more information on alarms, repeating appointments, and customer and cost codes.

8. To create additional appointments, click Add and repeat steps 2 – 7.
9. When you finish entering appointments, click OK.

Setting the time and duration of an appointment 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.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Time tracker, using

3. Click Display.

Finding time for an appointment

There are occasions when you need to schedule an appointment for whenever you're next available. Finding your next free time slot saves you the bother of looking through your calendar manually. You specify the duration of the appointment, and let Organizer find the next available time slot in your schedule. Organizer searches through each day, looking for an opening of the specified duration.

Organizer uses the default start-of-day and end-of-day settings in your Calendar in a search to find time, and it doesn't include weekends in its search. You can change the time your days start or end in Calendar by choosing View - Calendar Preferences and clicking the "Days start at" or "Days end at" boxes and selecting new times. To include weekends in Organizer's search for an alternative time, select "Include weekends in Find time search" in the Calendar Preferences dialog box.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Finding time

3. Click Display.

Setting up a tentative appointment

You can set up a tentative appointment in Calendar by penciling in the appointment. Let's say that the Sales department in your organization is planning a lunch-time seminar on Friday, November 29. You're not sure if you’ll be able to make the seminar, but you don’t want to forget about the date and other particulars of the appointment.

1. Create or edit an appointment.

   See Help for more information on editing appointments.
2. Select “Pencil in.”
3. Click OK.

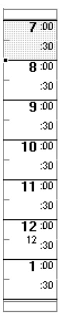
In the weekly and daily views, Organizer displays your appointment with a pencil-in symbol in your Calendar. If you customized your preferences in Calendar to indicate that you don’t want the symbol to appear, the pencil-in symbol won’t appear with your appointment. See Help for more information on customizing preferences in Calendar.

Tip You can also quickly pencil in an existing appointment in the Calendar section. Select the appointment and choose Appointment - Pencil in.

Booking and handling conflicting appointments

If you created two appointments for the same time, Organizer displays the Conflicting Appointment dialog box to warn of the conflict (unless you use View - Calendar Preferences to indicate that you don’t want to be alerted). You can either schedule the appointment as a conflict, or resolve the conflict by changing appointment information in the Conflicting Appointment dialog box. To schedule the appointment as a conflict, click OK. To resolve the conflict, perform the steps below.

1. Do one of the following:
   - Change the date, time, and / or duration of the appointment.
   - Click Find Time and Organizer will automatically find the next available time after the conflicting appointment.
   - Click Turn To to display the date of the conflicting appointment to see other appointments and available times.



   Note In addition to scheduling the appointment as a conflict or resolving the conflicting appointment, you may also choose to decline the appointment if you’re using Organizer with group scheduling (.NSF).
2. Click OK to accept the changes and schedule the appointment, or click Cancel to leave the dialog box without scheduling the appointment.

If you decide to enter the appointment and a conflict still exists, Organizer displays both appointments with a vertical red line to the left of the conflicting entries.

Note In the Day per Page view, if you're 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 conflict. Because you can view the conflict, it's assumed you're scheduling it intentionally. See "Customizing Calendar," later in this chapter, for information on displaying time slots.

Changing an appointment

You can change or edit existing appointment text directly, and you can drag and drop the appointment to a new date. To edit an appointment directly, click the appointment to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

Note When you're working with time slots in the Day per Page view, you can also position the mouse pointer on the appointment and click to edit the description. To change the start time, drag the appointment to another time; to change the duration, drag the appointment's top or bottom border. To schedule the appointment in single-minute increments, press **CTRL** and drag the top or bottom border to the appropriate time. See "Viewing your Calendar appointments," later in this chapter, for information on displaying the Day per Page view. See "Customizing Calendar," later in this chapter, for more information on displaying time slots.

For more information

For more information on how to add information to appointment fields you previously left blank, refer to Help (online documentation).

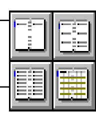
1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, appointments

3. Click Display.

Viewing your Calendar appointments

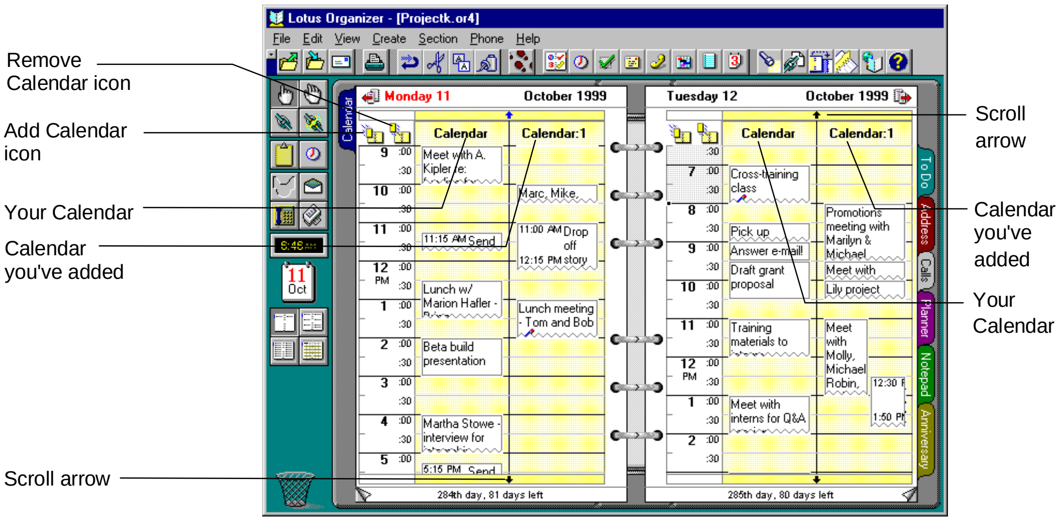
You can quickly display Calendar entries as a single day on each page, a one-week spread across two pages, a week on each page, or a month spread across two pages, by clicking one of the View icons in Toolbox.



The View icons change depending on what section you're in, so the view that you pick affects only the Calendar section you're in. Click a View icon to see how your view of Calendar changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Viewing multiple calendars

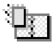
You can display two or more calendars side by side using Multiple Calendar view. For example, you can review your calendar and another user's calendar at the same time. (Show-through entries from other sections don't display in your calendar or in calendars you add in Multiple Calendar view, but they reappear in your calendar when you switch to another view.) You can also work in any displayed calendar for which you have sufficient access rights, but you can't copy or move appointments between calendars or change preferences for calendars other than your own. See Help for more information on viewing multiple calendars.



Adding a calendar to Multiple Calendar view

To display multiple calendars, you must choose Day per Page view, and the "Display timeslots for Day per Page View" option in the Calendar preferences dialog box must be selected. See "Viewing your Calendar appointments," earlier in this chapter, for information on displaying the Day per Page view. See "Customizing Calendar," later in this chapter, for more information on displaying time slots. You can add up to 15 calendars.

Note You can add only calendars from Organizer files that have been saved for multiple-user access.



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

   Tip You can also display the Add Calendar dialog box by right-clicking the title bar of an open calendar and choosing “Add Calendar.”

2. For “From,” type the file name whose calendar you want to display.

   Note If you’re using group scheduling, you can type a database name or the name of the user whose calendar you want to display.

   If necessary, click Browse to see a listing of available Organizer files or to change the location where Organizer looks for files.

3. Select the calendar section you want to display.
4. (Optional) Enter a title.

   The title you enter appears in a title bar above the calendar. The title you enter doesn’t change the file name.

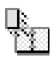
   Note If you’re using group scheduling and you don’t enter a title, Organizer assigns a title of “Calendar” with a number increment, for example, “Calendar 1.”

5. Click OK.

   To change the position of a calendar, place your cursor on the calendar title, and press and hold the right mouse button as you drag the calendar to a new location.

   Tip To increase the area in which to display your calendars, unfold your Calendar page.

Removing a calendar from Multiple Calendar view



1. In Multiple Calendar view, Choose View - Remove Calendar.

   Tip You can also display the Remove Calendar dialog box by right-clicking the title bar of an open calendar and choosing “Remove Calendar.”

2. Select the calendar you want to remove.
3. Click OK.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Views, Calendar

   Multiple calendar view

   Accessing someone else’s file

3. Click Display.

Showing other Organizer sections in Calendar and Planner

By default, your To Do, Planner, Calls, 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. Showing entries from other sections can help you see your commitments in the contents of your daily work. For example, you can see To Do tasks for the day along with your appointments.

Show-through entries from other sections don’t display in your calendar or in calendars you add in Multiple Calendar view, but they reappear in your calendar when you switch to another view.

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.

Option	*Result*
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.

- For Planner Preferences, select the color you want to represent your Calendar information and click OK. (Calendar information appears as a color band in Planner, for example, you may want to color code the Calendar information - the color band - by using text in the same color that the Calendar section tab uses.)

6. Click OK.

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

Customizing Calendar

In the Calendar section, you can set various preferences to customize how your appointments appear and what information appears with them. Changing preferences is optional. If you don’t change your Calendar preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.

2. Type this phrase:

Calendar section, customizing preferences in

3. Click Display.

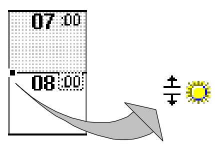
Working with time slots in the Day per Page view

Displaying time slots in the Day per Page view is particularly useful when your day is a series of scheduled appointments because both booked and available time slots are displayed.

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 start and end times for the day, and the time slot increments.

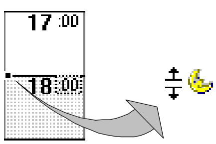
Changing the day’s start and end times from the Day per Page view

When you display time slots in the Day per Page view, you can dynamically change the default start and end times for all days in Calendar.



Note You can’t change the day’s start and end times in the Day per Page view if you’re working with group-scheduling (.NSF) files.

1. Do one of the following:



- Position the mouse pointer on the solid box to the left of the current start time. The pointer changes to include a sun symbol.
- Position the mouse pointer on the solid box to the left of the current end time. The pointer changes to include a moon symbol.

2. Drag the solid box to change the time.

Tip When you change the time slots, Organizer uses the time increments on the time ruler. For example, if the time increments are 15 minutes, the start time can be 8:00 or 8:15, but not 8:10.

For more information

For more information on changing the day's start and end time for group-scheduling (.NSF) files, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Start times, changing day in Calendar
3. Click Display.

Changing the time-slot increments from the Day per Page view

When you display 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.

Sharing your files

If you share your Organizer files with other users on a network, you can control access to your files with passwords, and you can also control how many users can access your file at one time.

In addition to sharing entire Organizer files, you and other users can share sections of Organizer files by including those sections.

For more information

Sharing Organizer group-scheduling files (.NSF) is different from sharing PIM (.OR4) files. For information on sharing .NSF files, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Sharing

   Sharing, files

   Sharing, sections
3. Click Display.

Controlling how many users can access a file at one time

You can specify single-user access or multiple-user access when you save an Organizer file. **Single-user access** means that only one user can access the file at a time. **Multiple-user access** means that more than one user can open and use the file at a time.

Note If two users work on the file at the same time, Organizer saves the file after each change that is made to the file.

1. Choose File - Save As.
2. If necessary, in the "File name" box, enter a file name.

   Click the "Save in" box and select the path you want Organizer to use to save the file.
3. Click the "Save as type" box and select whether one user or more than one user can access your file at the same time.

Option	*Result*
Single-user access Organizer (*.OR4)	If you use Organizer on a network where other users can access your files, lets you specify that only one user can open the file at one time. (The default is Single-user access.)
Multi-user access Organizer (*.OR4)	If you use Organizer on a network where other users can access your files, lets you specify that more than one user can open the file at one time.

4. Click Save.

Tip You can use this feature in conjunction with passwords to control access and changes to your file. For example, if you save a file with multiple-user access and assign Reader access to the file, you can give the Reader password to several users so they can all open and read your file at the same time but no one can make changes to the file. If you want someone to be able to change your file, you can give them Assistant access to a file and save the file with multiple-user access. That way, both you and the user you give the Assistant password to can work on the file at the same time.

Sharing and merging files

If you share a file on the network with another user who keeps track of your schedule, you may want to give that user Assistant access to your file. With Assistant access, that user can make changes to your file, schedule your appointments, keep a list of calls for you to make, and update your To Do list. To give a user Assistant access, you must create an Assistant password and give that password to the user.

If you’re frequently out of the office, you can rely on someone with Assistant access to update your file on the network with changes you make away from the office and with changes they make to the network copy of your file.

For example, you can e-mail the copy of the file you’re working on (while you’re away) to the user with Assistant access to your file at regular intervals. The user with Assistant access to your file can merge your changes with his or her changes to the network, save this copy to the network, and e-mail a copy back to you. In this way, you both keep your file on the network up-to-date and you receive a copy of the file to continue working on while you’re away from the office.

When you receive the updated file by e-mail, you should replace your copy with the updated copy that the user with Assistant access sends you. You shouldn’t work in your current local copy while waiting for the user with Assistant access to send you the updated copy. You must also be sure to maintain your original file in order to ensure accurate results when you merge the file you’ve been working on away from the office with your file at the office on the network.

Merging files

Consolidating Organizer files is called **merging**. The files you merge must share the same origin — that is, the two files must originally be copies of each other.

Tip To create two files that can later be merged, use File - Save As to create the parent-child relationship. Save As retains the original file, and makes a copy that shares the same properties.

Organizer merges additions, deletions, and edits to entries in sections (for example, an edited appointment or added To Do task). Other settings (such as password changes, access levels, or changes to section preferences) aren't merged.

1. Choose File - Open and select the target file into which you want to merge the source file.
2. Choose File - Merge.

   Tip You can also press **CTRL+M** to merge files.
3. Click the "File name" box and select a file (the source file) to merge.

   If necessary, click Browse to select the source file to merge.

   Tip The file you select to merge must be a parent or child of the one you're merging it with. You must have created one file from the other at some point.
4. Click Merge.
5. Under "Automatically accept," select the appropriate options to indicate which changes and additions from the source file you want to automatically enter in the target file.

Option	*Result*
Edits	Enters all edits from the source file.
Additions	Enters all additions from the source file.
Deletions	Enters all deletions from the source file.

6. If you don't automatically accept any options, Organizer displays the Select Merge Entries dialog box where you can select specific entries to merge into the target file.

   Click the tabs for each section: Edits, Additions, Deletions.
7. Click OK.

Note If you want to merge your file again, first make another copy of your source file (you can overwrite your destination file). Make additional changes to the destination file, and then merge the files.

Sharing sections of Organizer files

Files containing shared sections must be saved in the same location. For example, you can save these files on a network server. These files must also be saved with multiple-user access. To save a file with multiple-user access, see “Controlling how many users can access a file at one time,” earlier in this chapter.

You can make changes to an included section if its original file wasn’t password-protected or if you entered either the Assistant or Owner password when you included the section. For example, if the file with the section you’re including was saved with an Assistant password and multiple-user access, you can access the included section of that file at the same time as someone else.

Organizer keeps track of the entries in included sections and won’t let two users work on the same entry at the same time. By default, Organizer saves a multiple-user access file after each change.

If the information in an included section changes in the originating file, you can see the change in the included section. Press **F9** while you work in the included section to update all entries in an Organizer file and see the section’s most recent changes.

Including a section from another Organizer file

When you include a section from another user’s file, your own file will include that section you’re sharing unless you delete it. For example, if you’re an assistant, you can include your manager’s To Do section in your file with your own To Do section.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

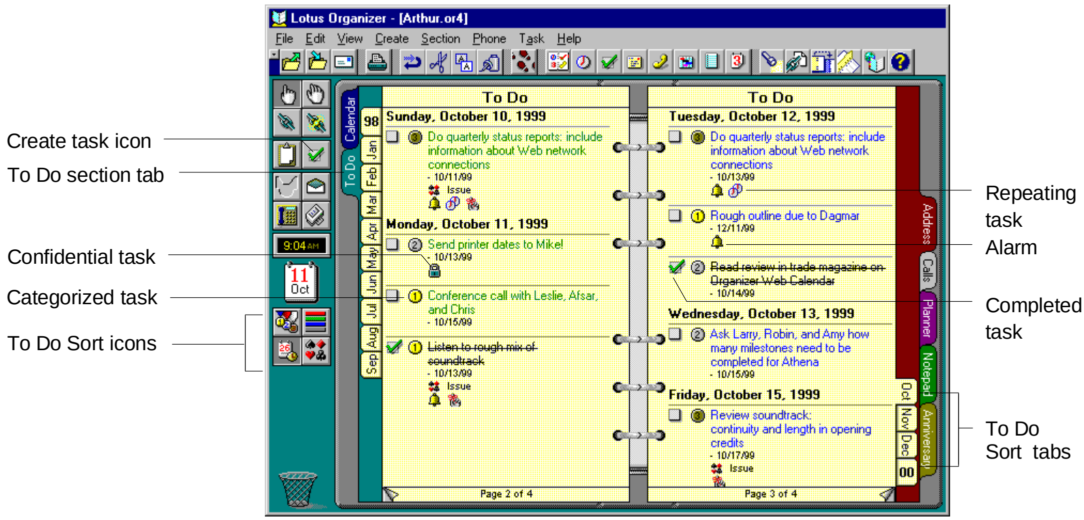
   Including sections, from other Organizer files
3. Click Display.

Other things you can do

For more information on how to copy, move, and delete Calendar appointments, and how to set alarms for appointments, create appointments that repeat at intervals you specify, create links, assign categories and cost codes, and search for information in Calendar, see Chapter 13.

Chapter 7
Managing Your To Do List

The To Do section lets you keep track of what you want to do and when you need to do it. Entries you create in To Do are called To Do tasks. You can organize these tasks with categories, prioritize tasks by status, set alarms for tasks you need to do at certain times, and mark tasks confidential so other users with access to your file can't view your tasks. Organizer also lets you show through To Do tasks in Calendar; this lets you see your tasks in your Calendar, and lets you see all your commitments in your Calendar. The To Do section lets you track projects, ideas, and status reports. You can also customize the way To Do works and the way tasks appear.



Creating a To Do task

Enter To Do tasks to track things you need to do and the time you need to set aside to do them. You can set various options such as priority, category, status, and alarm to classify your tasks in To Do.

1. In the To Do section, double-click the To Do page.

   Tip You can also choose Create - Task or press **INS** to create a To Do task, or click the Create task icon.

2. Under "Description," enter a description and / or notes about the To Do task.

   For example, "Complete status report for Waller project."

3. Under "Date," select a date for your task to start and when you want it due.

   To enter a start date, click the "Start" box and select a date. To enter a due date, click the "Due" box and select a date.

4. Click the "Categories" box to select a category for your To Do task.

   For example, you could create a category called "Waller Project."

   See Help for more information on categories.

5. Under "Priority," select the priority for your task: "1," "2," "3," or "No priority."

6. (Optional) Select "Confidential" to make the task confidential, so others who have access to your files can't view this task.

   Note Users who have Owner access to your file can see your confidential To Do tasks. See "Sharing your files," in Chapter 6 for more information.

7. (Optional) Click Alarm and set an alarm for your To Do task, and / or click Cost to assign a customer and cost code.

   See Help for more information on setting an alarm and / or assigning customer and cost codes.

8. To create additional tasks, click Add and repeat steps 2 – 7.

9. When you finish entering all your tasks, click OK.

Changing a To Do task

You can change or edit existing tasks directly. Click the task to select it, and click the text you want to edit (the mouse pointer changes to an I-beam). Make your changes and press **F2** to enter your changes.

For more information

For more information on how to add information to To Do task fields you previously left blank, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

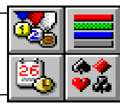
   Changing, To Do tasks
3. Click Display.

Sorting your To Do tasks

You can quickly sort To Do tasks by priority, status, start date, or category, by clicking one of the Sort icons in Toolbox.

Sorts the To Do priority page tabs as 1, 2, 3, Unprioritized; A, B, C, Unprioritized; or H, M, L, Unprioritized.

Sorts your To Do date page tabs by start date: January-December of current year with tabs for years before and after.



Sorts your To Do status page tabs as Overdue, Current, Future, and Completed.

Sorts your To Do categories page tabs alphabetically (A-Z). Includes # tab for uncategorized tasks.

The Sort icons change depending on what section you're in, so the view that you pick affects only the To Do section you're in. Click a Sort icon to see how your view of To Do changes. Your selection affects all entries in that section, not just one or two. When you change a view, you're only changing how or what information appears.

Checking the status of a To Do task

The description of your To Do task is assigned a color according to the following kinds of status: overdue, current, future, or completed. To establish the status of a To Do task, Organizer checks for a date or a priority. If no date or priority is associated with a To Do task, it is assigned the current status.

1. Go to the To Do task.

2. Check the status of your To Do task by checking the color.

For more information

For more information on checking the status of your To Do tasks, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.

2. Type this phrase:

To Do section, checking the status of tasks

3. Click Display.

Marking a To Do task completed

When you complete your task, you can mark it completed. A check mark appears next to the task so that you know if it's completed.

Note For information on updating your To Do tasks in your Organizer 97 GS group-scheduling (.NSF) file, see Notes Help.

1. Double-click the To Do task you want to mark completed.

2. Click the "Completed on" box and select a date.

Tip You can also click the "Completed on" box to the left of the To Do task description to mark the task completed with the current date as the completion date.

3. To show completed tasks with strike-through text, select View - To Do Preferences and choose "Strikeout."

Customizing To Do

In the To Do section, you can set preferences to customize how your tasks appear and what information appears with them. Changing preferences is optional. If you don't change your To Do preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   To Do section, customizing preferences in

3. Click Display.

Other things you can do

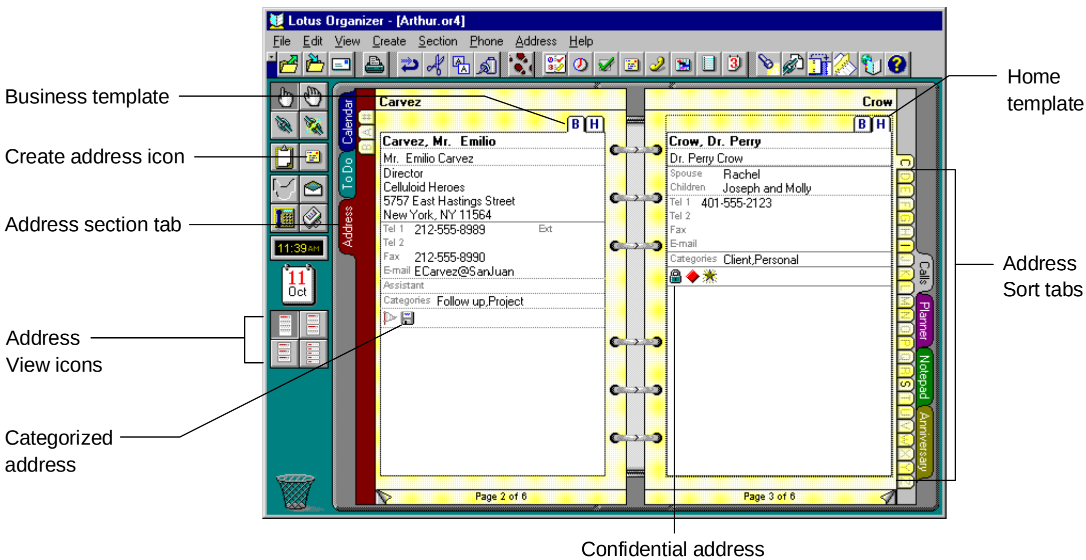
For more information on how to copy, move, and delete To Do tasks, how to set alarms for tasks, create tasks that repeat at intervals you specify, make tasks confidential, create links, assign categories and cost codes, search for information in To Do, and use filters, see Chapter 13.

Chapter 8
Working with Names and Addresses

The Address section acts like an address book; however, the Organizer electronic Address section lets you do more. You can sort your addresses either by last name, company, category, or zip code. You can even create a customized address field, such as a field for a car phone telephone number or pager telephone number. In the address section, each address is called an **Address record**.

You can view your Address records in different ways. For example, you can view Address records with all of the information you entered for a record, with just a name and address, and so on.

The Address section also helps you quickly 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 more information

Organizer handles PIM (.OR4) Address records and group-scheduling (.NSF) Address records differently. For more information about Organizer group-scheduling (.NSF) Address records, refer to Help (online documentation).

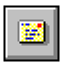
1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Address section

3. Click Display.

Creating an Address record

Organizer provides you with two different address templates that look like address cards with tabs. One tab is for business addresses and the other is for home addresses.



1. In the Address section, double-click the Address page.

   Tip You can also choose Create - Address or press **INS** when you're in the Address section to create an Address record.

2. Click the "Title" box and enter or select a title for the person's name you'll include in the Address record. For example, you can use the title Ms., Mr., Prof., and so on.
3. For "First name" and "Last name," enter the person's name.
4. Click the Business or Home tab to select the type of Address record you want.

   You can determine what tab appears in front automatically. See Help for more information on customizing preferences in Address.

5. Enter the information you want listed in the fields for that business or home Address record.

   Tip Press **TAB** to move quickly between options in the Create Address dialog box.

6. (Optional) Click the "Categories" box and select a category for your address.

   See Help for more information on categories.

7. (Optional) Select "Confidential" to make your Address record confidential, so others accessing your file can't view it.

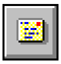
   If you assigned a password to your file, only the Owner can see and change entries that are confidential. See "Sharing your files," in Chapter 6, for more information.

8. To create additional Address records, click Add and repeat steps 2 – 7.
9. When you finish entering Address records, click OK.

Entering different business associates for the same business address

You can include more than one contact at the same company without re-entering the address information repeatedly. Organizer copies company information from one Address record to another to save you time. If some information in the new Address record differs from the original address, you can change that information.

Note This procedure assumes that you've entered at least one other contact's business address from the same company and location.



1. Create the new business Address record.
2. Enter your contact's name and company name.
3. Press **TAB**.

   The Similar Address Found dialog box appears.
4. Under "Copy details from," select the company you want.
5. Click OK.

   Organizer automatically fills in the address, zip code, phone number, and fax fields for the new Address record.

   You can change any information in the Address record by editing the field you need to change. See Help for more information on editing Address records.
6. (Optional) To create additional Address records, click Add and repeat steps 2 – 5.
7. When you finish entering Address records, click OK.

Renaming address fields

You can rename any address field. The changes you make to field names affect all the business or home address fields in the current Address section.

For more information

For more information on renaming address fields and using & (ampersand) to create keyboard shortcuts in fields, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Address record fields, changing field names

   Editing, field names in Address records
3. Click Display.

Changing an Address record

You can change or edit existing address text directly. Click the Address record to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

For more information

For more information on how to add information to Address record fields you previously left blank, refer to Help (online documentation).

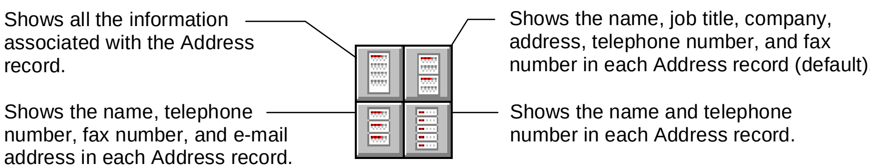
1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, Address records

3. Click Display.

Viewing your Address records

You can quickly change how much information you see with each Address record by clicking one of the View icons in Toolbox.



The View icons change depending on what section you're in, so the view that you pick affects only the Address section you're in. Click a View icon to see how your view of Address changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Sorting Your Address records

You can sort Address records by last name, company, category, or by a particular Address record field. The sorting you select affects the order in which your Address records appear within the Address section. At any time, you can change how you want to sort your Address records.

1. In the Address section, choose View.
2. From the View menu, choose the command you want to sort your 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.
By Category	Sorts your Address records alphabetically by category for Address records to which you've already assigned categories. Page tabs include # for Address records you didn't assign a category to. See Help for more information on categories.

Customizing Address

In the Address section, you can set various preferences to customize how your addresses are sorted and what information appears with them. Changing preferences is optional. If you don't change your Address preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Address section, customizing

3. Click Display.

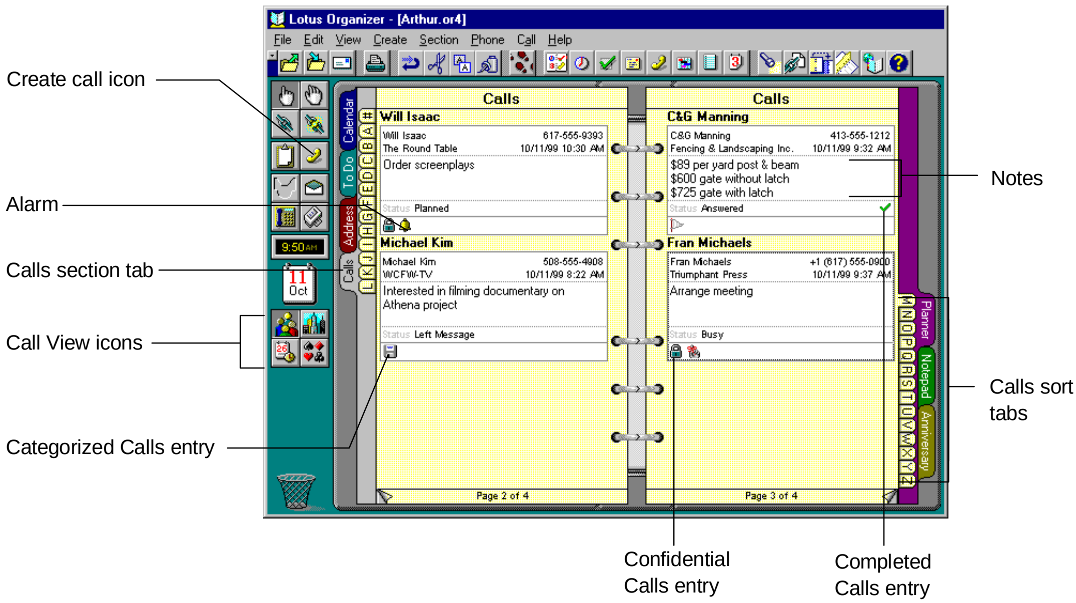
Other things you can do

For more information on how to copy, move, and delete Address records and how to create links, assign categories, search for information in Address, and use filters, see Chapter 13.

Chapter 9
Keeping Track of Phone Calls

The Calls section lets you keep track of phone calls. You can jot down notes on both your incoming and outgoing phone calls, include information on who the call was from or to, keep track of the duration of the call, or set it to automatically track the duration of the call when you answer it. You can also schedule calls you want to make at some future date and set an alarm to remind yourself. You can track the status of follow-up calls, and quickly redial unanswered calls you already made. In the Calls section, each entry you make for a call is called a **Calls entry**.

The Calls section works closely with the Address section. You can access any name, company, and phone number you entered in your Address section. If you installed and connected a modem, you can use Organizer to dial any phone number that appears in your Calls section, Address section, or any other section.

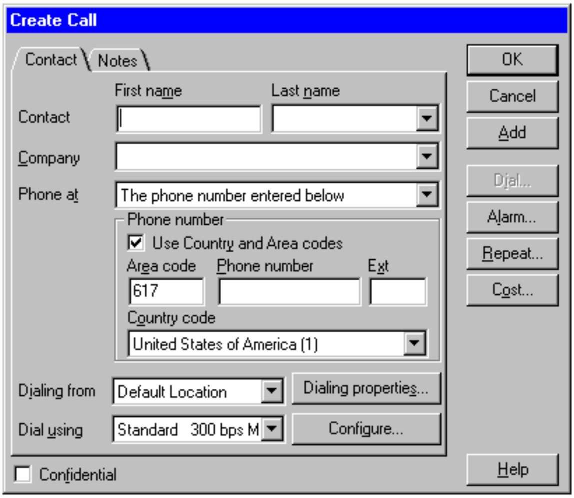


Creating a Calls entry

1. In the Calls section, double-click the Calls page.

   Tip You can also choose Create - Call or press **INS** when you're in the Calls section to create a Calls entry.

2. Enter the contact's first name, last name, and company, or click the boxes and select names you already entered in your Address section.

   Organizer attempts to match any part of an Address record you enter. 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.

3. Click the "Phone at" box and select the telephone number you want to use.

   After you select a contact or company name, 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.

4. Under "Phone number," select the options for the phone number you want.

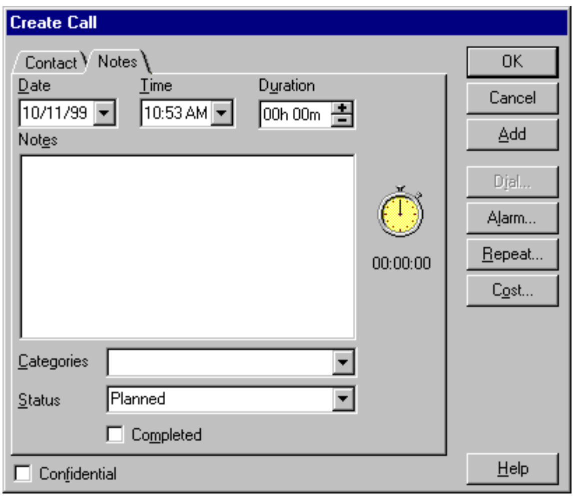
Option	*Result*
Use country and area codes	Uses (default) or doesn't use the country and area codes of a telephone number when Organizer dials a telephone number.
Area code	Lets you specify the area code of the telephone number you want to call.
Phone number	Lets you specify the telephone number you 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. If you don't specify a country code, Organizer uses the country specified in the current "Dialing from" location. See Help for more information on dialing a phone number from Organizer.

Note If you select a contact name and / or company, the area code, phone number, and extension are automatically filled in from information you supplied in the Address record.

5. (Optional) Click Alarm to set an alarm for your Calls entry, click Repeat to make a Calls entry repeat at intervals you specify, and / or click Cost to assign a customer and cost code.

   See Help for more information on setting an alarm, creating repeat intervals, and / or assigning customer and cost codes.

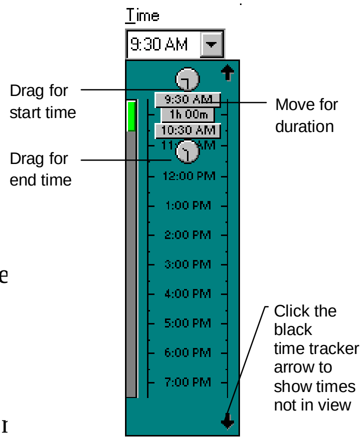
6. Click the Notes tab.



7. Click the "Date" box and select the date for the Calls entry.

8. Click the "Time" box and select the time for the Calls entry (with time tracker) or enter the time.

   If necessary, for "Duration," specify the duration of the Calls entry by clicking the + (plus) to increase or - (minus) to decrease the time of the call.



9. Under "Notes," enter a description of the Calls entry.
10. (Optional) Click the stopwatch to start tracking the duration of the call. Click the stopwatch again to stop timing the call.
11. Click the "Categories" box and select a category for the call.

    See Help for more information on categor
12. If necessary, click the "Status" box and select a status from the list that appears.

    See "Assigning the status for a Calls entry," later in this chapter, for more information.
13. Select the options you want.

	Option	*Result*
	Completed	Marks or doesn't mark (default) your Calls entry completed. See "Marking a Calls entry completed," later in this chapter, for more information on completing a call.
	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. See "Sharing your files," in Chapter 6, for more information.

14. To create additional Calls entries, click Add and repeat steps 2-13.
15. When you finish entering all your Calls entries, click OK.

For more information

If you answer an unexpected phone call, you can create a Calls entry for it, quickly. For more information on quickly creating a Calls entry for an incoming call, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Incoming calls, creating Calls entry for
3. Click Display.

Dialing a phone number from Organizer

Organizer can dial telephone numbers that appear in any Calls entry. Organizer can also quickly dial any phone number that appears with an entry in your To Do, Address, Calls, or any other section.

You must be connected to and use a modem to dial phone numbers from Organizer.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Dialing, changing dialing from location

   Dialing, configuring your modem

   Dialing, phone numbers

   Dialing, phone numbers quickly
3. Select the index entry you want, then click Display.

Clocking a phone call

You can clock how much time you spend during a phone call. Choose Create - Call, click the Notes tab, and 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.

Assigning the status for a Calls entry

You can change the status for any Calls entry at any time. The status you select helps you identify the result of the phone call. For example, if you select “Busy” or “No Answer,” you’ll know to try the call again.

1. In the Calls section, double-click the Calls entry for which you want to assign the status.
2. Click the Notes tab.
3. Click the “Status” box and select a status from the list that appears: “Planned,” “Try later,” “Answered,” “Incoming,” “Left message,” “Calling back,” “No Answer,” “Follow up,” or “Busy.”
4. Click OK.

   Organizer displays the status you assigned in the status field of the Calls entry in your Calls section.

Recording a follow-up phone call

When you record a follow-up Calls entry, by default, Organizer automatically links the follow-up Calls entry to the original Calls entry you made.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Follow-up calls

3. Click Display.

Changing a Calls entry

You can change or edit existing Calls entry text directly. Click the Calls entry to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

For more information

For more information on how to add information to Calls entry fields you previously left blank, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, Calls entries

3. Click Display.

Marking a Calls entry completed

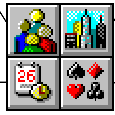
When you complete your Calls entry, you can mark the call completed. A check mark appears in the Calls entry so that you know it's been closed.

1. Go to the Calls entry you want to mark completed and select it.
2. Choose Call - Completed.

   Organizer displays the Calls entry with a green check mark.

Viewing and sorting your Calls entries

You can quickly sort your Calls entries by clicking one of the View icons in Toolbox. When you change the view, you change the sort order.



The View icons change depending on what section you're in, so the view that you pick affects only the Calls section you're in. Click a View icon to see how your view of the Calls section changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Customizing Calls

In the Calls section, you can set various preferences to customize how your Calls entries appear, and what information appears with them. Changing preferences is optional. If you don't change your Calls preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Calls section, customizing preferences in
3. Click Display.

Changing telephone dialing preferences

Telephone dialing preferences determine the device, such as a modem, as well as 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.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

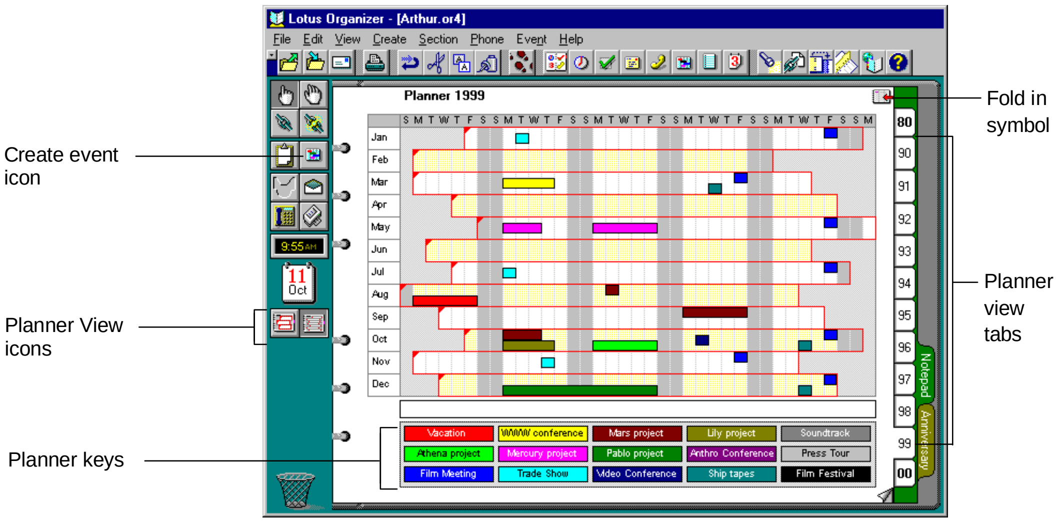
   Telephone Dialing, changing preferences in
3. Click Display.

Other things you can do

For more information on how to copy, move, and delete Calls entries, and how to set alarms for Calls entries, create Calls entries that repeat at intervals you specify, create links, assign categories and cost codes, search for information in Calls, and use filters, see Chapter 13.

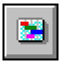
Chapter 10
Charting Events in Planner

The Planner section helps you see what lies ahead as you manage your long-term schedule. Entries you create in Planner are called **Planner events**. With Planner, you designate blocks of time for particular activities, such as vacations, training sessions, and conferences. You can view events by year or by quarter, and you can specify that your events show through in the Calendar section so that you can see events in the context of your daily work.



Creating a Planner event

You can create Planner events in two ways: through the Create Event dialog box or with the pen tip (mouse pointer). If you enter many events at once but you don't need to fill in details right away, you'd probably prefer the pen tip. See "Entering an event with the pen tip," later in this chapter. If you'll be filling in the details when you create the event, use the procedure below.

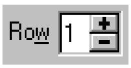


1. In the Planner section, double-click the Planner page.

Tip You can also choose Create - Event or press INS when you're in the Planner section, or click the Create Event icon.

2. Click the "Event type" box and select an event type.

3. For "Row," click + (plus) to increase or - (minus) to decrease the row number: 1-4 for the Year per Page view and 1-8 in the Quarter per Page view.



Tip If you don't select a row, your first entry goes into row 1 by default. See "Displaying overlapping events," later in this chapter, for more information.

4. Under "Notes," enter a description of the event.

5. Click the "From" and "Until" boxes to select the start and end date of the event, or enter dates for them.

You can enter an end date for any event, and Organizer automatically adjusts the number of days for the event. If you enter a specific number of days, Organizer automatically adjusts the end date.

If necessary, under "Days," specify the duration of the event by clicking the + (plus) to increase or the - (minus) to decrease the duration of the event.

6. Click the "Categories" box to select a category for your event.

See Help for more information on categories.

7. (Optional) Click "Confidential" to make the event confidential, so others who have access to your files can't view it.

See "Sharing your files," in Chapter 6, for more information.

8. Click Alarm to set an alarm for your event, click Repeat to make an event repeat at intervals you specify, and / or click Cost to assign a customer and cost code.

See Help for more information on setting an alarm, creating repeating intervals, and / or assigning customer and cost codes.

9. To create additional Planner events, click Add and repeat steps 2 - 8.

10. When you finish entering all your Planner events, click OK.

Entering an event with the pen tip

You can quickly enter Planner events with the pen tip. Event types, such as Vacation, Training, and Conference, have color-coded Planner keys which you can see beneath the Planner chart. You select a Planner key, then enter events for that type on the Planner chart.

1. Click an event type from the color-coded Planner keys beneath the Planner chart.

   For information on customizing Planner keys, see "Changing Planner keys," below.

2. Move the mouse pointer to the Planner chart.

   Notice the mouse pointer changes to look like the tip of a pen.

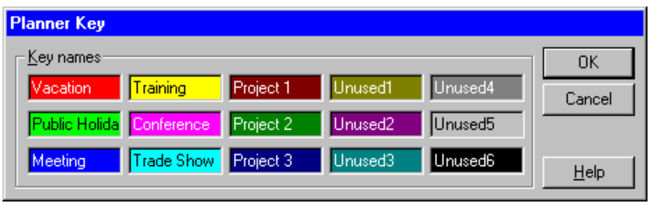
3. Do one of the following:
   - To enter an event for a single day, click a day on the Planner chart to start the event.
   - To enter an event over several days, drag the pen tip over those days in the Planner chart.

Changing Planner keys

Planner keys help you color code your Planner events. These color-coded Planner keys represent event types. You can customize the names of events by changing the key names. Planner keys appear beneath the Planner chart.

1. Double-click a Planner key you want to change.

   For example, "Unused1."



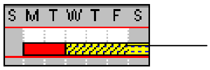
   A blinking cursor appears in the Planner key you want to change.

2. Press **DEL** until the current key name is removed and enter a new key name.
3. Click OK.

Displaying overlapping events

Planner days are divided into 4 rows in Year per Page view and 8 rows in Quarter per Page view. All rows of an event you create in Quarter per Page view will appear in Year per Page view. However, if you create rows in the Year per Page view then switch to the Quarter per Page view, Organizer combines two rows into a single row in Quarter per Page view.

If you chart Planner events on top of each other or create more events than the Planner chart has rows to display, Planner displays cross hatching in a color block to indicate that there's an event you can't see.



Cross-hatching indicates events that overlap

Changing a Planner event

You can change or edit existing Planner events directly on the Planner chart with the pen tip. Place the mouse pointer on the event in the Planner chart; when the mouse pointer changes to a double arrow, press and hold the mouse button and drag the arrow left or right to increase or decrease the duration of the event.

To move an event, keeping the same duration, click the event, then drag and drop it to the desired date.

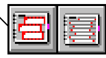
For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Events, changing Planner events
3. Click Display.

Viewing Planner events

You can quickly display Planner events by quarter or by year by clicking one of the View icons in Toolbox.



The View icons change depending on what section you're in, so the view that you pick affects only the Planner section you're in. Click a View icon to see how your view of Planner changes. Your selection affects all entries in that section, not just one or two. When you change a view, you're only changing how or what information appears.

Showing Calendar appointments 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 your Planner chart.

To help you quickly identify Calendar information in Planner, you can color code the Calendar information (the color 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.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Showing in Planner
3. Click Display.

Customizing Planner

In the Planner section, you can set various preferences to customize how your events appear and what information appears with them. Changing preferences is optional. If you don't change your Planner preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Planner section, customizing preferences in
3. Click Display.

Other things you can do

For more information on how to copy, move, and delete Planner events, and how to set alarms for events, create events that repeat at intervals you specify, make events confidential, assign categories and cost codes, search for information in Planner, and use filters, see Chapter 13.

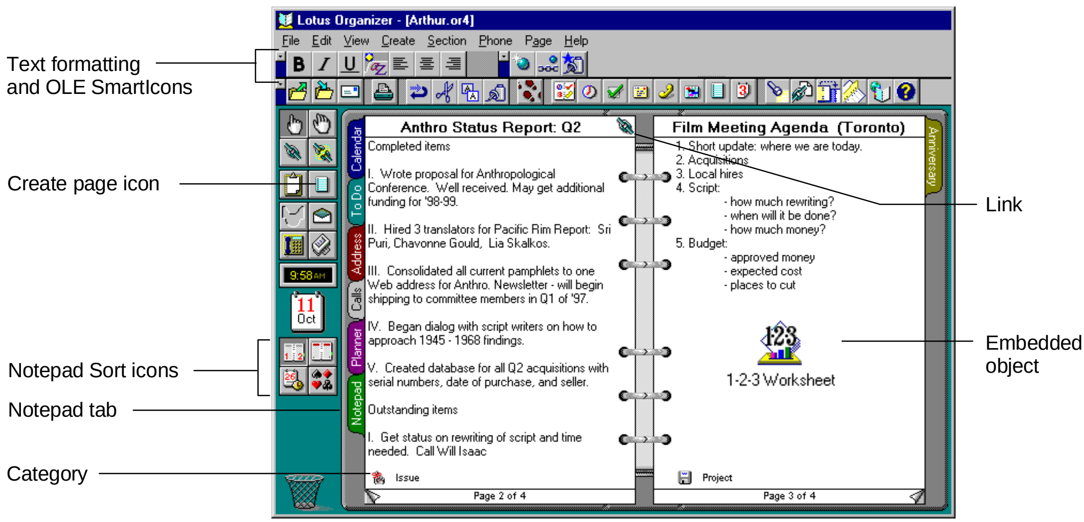
Chapter 11
Centralizing Information in Notepad

The Notepad section helps you organize information in the form of notes, lists, memos, spreadsheets, sales charts, diagrams, organizational charts, maps, and logos.

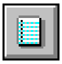
Entries you create in Notepad are called **Notepad pages**. A Notepad page holds information that you either enter in Organizer, or embed or link from other applications.

If you embed an object — such as a spreadsheet, word processing document, or presentation — its information can be viewed and edited from Notepad. If you also specify that the information is linked to its original file, the information is automatically updated whenever you make changes to the original file.

You can sort the information in Notepad by color coding pages, by assigning categories and cost codes to pages, and by specifying how pages are listed on the Contents page. You can specify that the Notepad Contents page lists pages by their titles, page numbers, categories, or date.



Creating a Notepad page



1. In the Notepad section, double-click the Notepad page.

   Tip You can also choose Create - Page or press **INS** when you're in Notepad to create a Notepad entry.

2. Under "Title," enter a page title.

   For example, "Waller Project Status Report."

   This field is optional; however, it's a good idea to title your entry because Notepad can list pages by their titles on the Contents page.

3. Under "Page number," select "Automatic" (default) or "Manual" to enter a page number and override automatic page numbering.

4. Under "Style," select the appropriate options.

Option	*Result*
Start a chapter	Establishes a chapter beginning with this page.
Links page	Lets you link pages within and across Organizer sections that contain related information.
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.

5. (Optional) Click the "Categories" box and select a category for your Notepad page.

   See Help for more information on categories.

6. (Optional) Select "Confidential" to make the page confidential, so others who have access to your files can't view it.

   See "Sharing your files," in Chapter 6, for more information.

7. To create additional Notepad pages, click Add and repeat steps 2 - 6.

8. When you finish entering all your Notepad pages, click OK.

Adding text to a page

After you've entered a title for your Notepad page, and completed any other steps above, you can add text to your page. Position your mouse pointer on a Notepad page and click. Click again and the I-beam appears. Begin entering (or typing) the text you want on that page.

Editing text

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're 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've not selected, you need to edit your Notepad page in the Edit Page dialog box. Choose Edit - Edit Page.

Tip You can also press **CTRL+E** to edit a Notepad page you selected.

When the Edit Page dialog box appears, you can make your changes and click OK to enter your changes.

Changing text settings

You can customize your Notepad text by selecting different fonts and attributes. You can make selections that affect entire Notepad pages of text or only individual letters of a single word.

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 finish 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.

Changing text fonts

1. Go to the Notepad page you've created.
2. Select the text you want to change by highlighting it.
3. Choose Text - Font.
4. Select the fonts and attributes you want.

   Click the "Font," "Font style," and "Size" boxes and choose from the fonts, font styles, and font sizes shown.

5. Under “Effects,” select “Strikeout” to draw a line through text or “Underline” to underline text.
6. Click the “Color” box to select the color for the text you selected.
7. Click OK.

Changing text alignment

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.

Option	*Result*
Left	Selected text appears aligned along the left margin of the Notepad page.
Right	Selected text appears aligned along the right margin of the Notepad page.
Center	Selected text appears centered on the Notepad page.

Indenting paragraphs

You can indent any paragraph on a Notepad page so that it appears exactly where you want it to appear.

For more information

For more information on indenting paragraphs on Notepad pages and changing the appearance of text on your Notepad pages, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Notepad section
3. Select the index entry you want, and click Display.

Sharing data using OLE

Object Linking and Embedding (OLE) lets you share data across applications. Depending on the task, you either create a link or embed the data.

For more information

For more information on when to link or embed with Object Linking and Embedding, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   OLE, overview

3. Click Display, select a topic, and click Display again.

Embedding a file as an OLE object on a Notepad page

1. Select the Notepad page on which you want to embed a file.
2. Click the page to place the insertion pointer on the page.

3. Choose Create - Object.
4. Select “Create an object from a file.”
5. For “File,” enter the path and file name of the file you want to embed.

   You can enter the path and file name in the “File” box or click Browse to locate the file you want to use.

6. (Optional) To also create a link to the file, select “Link to file.”
7. Select “Display as icon” to display an icon to represent the contents of the embedded object.

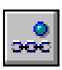
   If you don’t select this option, Organizer inserts a picture of the file’s contents in the Notepad page.

8. Click OK.

Managing links

When you create a linked OLE object, Organizer automatically updates the information on your Notepad page when you start Organizer. You can also manually update the information.

1. Select the object you want to edit.



2. Choose Edit - OLE Links.
3. In the link box, select the link you want to update.
4. For “Update,” select “Manual” to change how the link will be updated.

5. To update the linked information now, click Update Now.
6. Click Done.

For more information
For more information on creating and editing OLE and linked objects and on managing links, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Objects
3. Select the index entry you want, and click Display.

Using the Contents page of your Notepad pages

You use the Contents page to view a listing of your Notepad pages. You can choose to have the pages listed by page number, page title, date, or category. You can also double-click a page in the listing to go to that page in your Notepad. Notepad automatically creates the Contents page and updates it as you add pages.

For more information
For more information on using the Contents page to view Notepad pages, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Pages in Notepad, sorting
3. Select the index entry you want, and click Display.

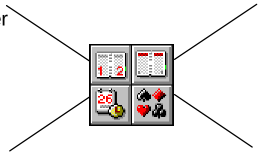
Using the Contents page to move a Notepad page

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.

Sorting your Notepad pages using the Sort icons

You can quickly change how the Contents page sorts your Notepad pages by clicking one of the sort icons in Toolbox.



These icons change depending on what section you're in, so the view that you pick affects only the Contents page in the Notepad section. Click an icon to see how your view of the Contents page changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Customizing Notepad

In the Notepad section, you can set preferences to customize how your Notepad pages appear and what information appears with them. Changing preferences is optional. If you don't change your Notepad preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Notepad section, customizing preferences in

3. Click Display.

Other things you can do

For more information on how to copy, move, and delete Notepad pages, create links, assign categories and cost codes, and search for information in Notepad, see Chapter 13.

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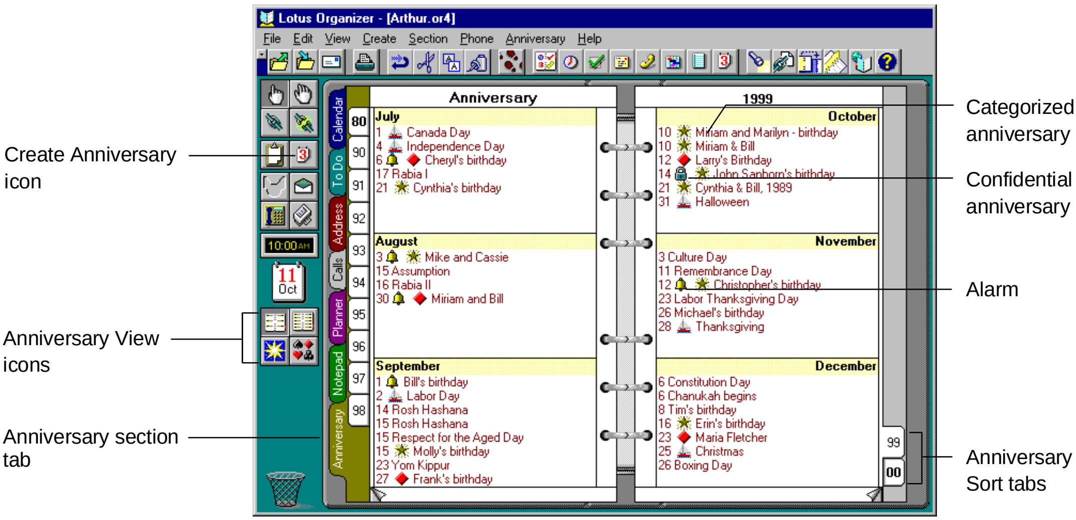
Chapter 12
Remembering Anniversaries and Other Special Dates

The Anniversary section lets you keep a list of all the important dates you need to remember every year. You can include anniversaries, birthdays, wedding dates, or special days (for example, pay days) you want to be reminded of. You can enter as many anniversaries as you like. Entries you create in the Anniversary section are called **Anniversary entries**.

You can specify that an anniversary you enter is automatically carried forward every year; you can sort and view your anniversaries by year, month, category, or zodiac sign; and you can set an alarm for an anniversary to remind you when the anniversary date is current. Organizer also lets you show through your anniversaries in your Calendar section, so you can see the anniversaries in the context of your daily work.



Creating an Anniversary entry

1. In the Anniversary section, double-click the Anniversary page.

   Tip You can also choose Create - Anniversary or press **INS** when you're in the Anniversary section to create an Anniversary entry.

2. Under "Description," enter a description of the anniversary.
3. Click the "Date" box and select the date for the anniversary.
4. (Optional) Click the "Categories" box and select a category for your anniversary.

   See Help for more information on categories.

5. Select the options you want.

Option	*Result*
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 created it.
 Confidential	Makes or doesn't make (default) the anniversary 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. See "Sharing your files," in Chapter 6, for more information.

6. (Optional) Click Alarm to set an alarm for your anniversary, click Repeat to make an anniversary repeat at intervals you specify, and / or click Cost to assign a customer and cost code.

   See Help for more information on setting an alarm, creating repeating intervals, and / or assigning customer and cost codes.

7. To create additional anniversaries, click Add and repeat steps 2 – 6.
8. When you finish entering all your anniversaries, click OK.

Changing an Anniversary entry

You can change or edit an Anniversary directly to change the description of the anniversary. Click the Anniversary entry to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

For more information

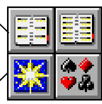
1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, anniversaries

3. Click Display.

Viewing and sorting your anniversaries

You can quickly change how your anniversaries are sorted and what information appears by clicking one of the Anniversary View icons in Toolbox. When you change the view, you change the sort order.



The View icons change depending on what section you're in, so the view that you pick affects only the Anniversary section you're in. Click a View icon to see how your view of Anniversary changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Customizing Anniversary

In the Anniversary section, you can set various preferences to customize 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 default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Anniversary section, customizing preferences in

3. Click Display.

Other things you can do

For more information on how to copy, move, and delete Anniversary entries, and how to set alarms for anniversaries, create Anniversary entries that repeat at intervals you specify, create links, assign categories and cost codes, search for information in Anniversary, and use filters, see Chapter 13.

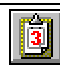
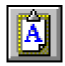
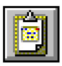
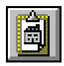
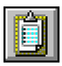
Chapter 13
Putting It All Together

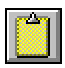
Now that you're familiar with some of the key features available in each Organizer section, you can try some features that are available across all or many Organizer sections, between Organizer files, and between Organizer and other applications. By the end of this chapter, you'll see why Organizer is such a powerful, integrated productivity tool.

Copying Organizer information

You can copy and paste Organizer information between Organizer sections and with other applications. You copy and paste information in conjunction using Organizer Clipboard in Toolbox or Windows Clipboard. When you copy information, your newly copied information writes over anything that is currently on Clipboard, and you must paste this information to see it in its new destination.

Note When you copy information to Organizer Clipboard, notice that what appears on Clipboard is relevant to the kind of information you're copying to it.

Type of copied information	*Clipboard icon with copied entry*	*Type of copied information*	*Clipboard icon with copied entry*
Calendar appointment		Anniversary entry	
To do task		Text	
Address record		Metafile	
Calls entry		Bitmap	
Planner event		Mixed entry (multiple entries)	
Notepad page			

Note An empty Clipboard looks like this: 

Quickly copying entries between different Organizer sections

You can use Clipboard in the Organizer Toolbox to quickly copy an entire Organizer entry or multiple entries. The entry or entries can contain text, links, a metafile, or a bitmap.

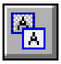
For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Copying, entries

3. Select the index entry you want, and click Display.

Using Windows Clipboard to copy entries




You can also use Windows Clipboard to copy and paste entries between sections. Select the entry you want to copy and choose Edit - Copy, or press **CTRL+C**. Then go to the page on which you want to paste the entry and choose Edit - Paste or press **CTRL+V** to paste the entry from Clipboard. You can also press and hold **CTRL** as you drag and drop the entry to the section tab of the section you want to copy to.

Copying text between Organizer sections and other applications

You can copy selected text from any Organizer entry to Clipboard, and paste the text either to another Organizer entry or to another application.

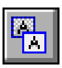
1. Click the entry you want to copy to select it.

   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 blinking vertical cursor.

3. Select the text you want to copy by pressing and holding the left mouse button while you highlight the text.



4. Choose Edit - Copy.

   Tip You can also press **CTRL+C** or you can drag and drop your selection to the Clipboard icon in Toolbox to copy text you selected.

5. Do one of the following:

   - If you're copying to another Organizer entry, click an Organizer entry to select it.

     The pointer changes to the I-beam.

   - If you're copying information to another application, switch to the application where you want your copied text to appear.

Using Edit - Copy Special to copy Organizer field information

You can copy specific Organizer field information from any Organizer entry to another Organizer section or to another application. In many cases, the fields you can select are combined into a useful format. The fields you can copy also depend on the type of entry you select. Additionally, Organizer supports vCalendar and vCard formats for copying and pasting appointment, task, and address information.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Copy Special
3. Click Display.

Using vCalendar and vCard

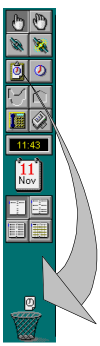
vCalendar and vCard formats are protocols that let you easily share your appointments, tasks, and Address records with other applications that support vCard and vCalendar. With vCalendar, you can share information in appointments and tasks. With vCard, you can share information in your Address section in the form of an electronic business card.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   vCalendar and vCard
3. Click Display.

Deleting the contents of Clipboard



You can delete Clipboard contents at any time. Deleting Clipboard contents means that any information you copied to Clipboard is cleared from Clipboard.

Caution You cannot retrieve, nor use Undo to retrieve, deleted Clipboard contents.

To delete the contents of Clipboard, drag and drop Clipboard to Trash in Toolbox.

Moving Organizer information to a new location

You can move an entry to another area, another page, or another section.

If you're moving an entry that repeats, you can select whether to change any of the other repeating entries, too. See Help for more information on moving repeating entries.

1. Go to the entry you want to move.

2. Click the Pick up icon in Toolbox.
3. Select the entry you want to move by clicking it.

   A symbol representing the type of entry you're moving appears in the hand when it picks up the entry.

Type of information	*Symbol*	*Type of Information*	*Symbol*
Calendar appointment		Planner event	
To Do task		Notepad page	
Address record		Anniversary entry	
Calls entry			

4. Click where you want the information moved: another area, another page, another section, and so on.

Tip You can also move an entry to another area, page, or section by dragging and dropping the entry to the 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.

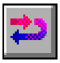
 

You can also select the entry you want to move, choose Edit - Cut, go to the new area, and then choose Edit - Paste.

Deleting Organizer information

You can delete a single entry or many entries at one time.

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 reentered in your Notepad section.



If you deleted an entry or entries by mistake, you can retrieve the deleted entry or entries by choosing Edit **-** Undo. You can undo only the last action you performed.

1. You can delete one or more entries in the following ways:
   - If you're deleting one entry, click the entry you want to delete.
   - If you're deleting two or more entries that are in sequence, select the first entry you want to delete, press and hold **SHIFT**, and click the last entry.
   - If you're deleting two or more entries that aren't in sequence, select the first entry you want to delete, press and hold CTRL, and click each entry.

2. Drag and drop the entry or entries to Trash in Toolbox.

Tip You can also delete an appointment by selecting it and then pressing **DEL**, by choosing Edit **-** Cut, or by pressing **CTRL+X**.

Setting an alarm for an entry

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!"

1. Create or edit an entry.

   See Chapters 6 **-** 12 for information on creating and editing entries in a specific Organizer section.

2. Click Alarm.
3. Select "On" to turn on the alarm.
4. Click the "Date" box and select the date you want your alarm to go off.

5. Click the “Time” box and select the time you want your alarm to go off.

   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 number of minutes. Then select “Before” or “After” to indicate when you want the alarm to go off (before the entry or after the entry is scheduled).

6. Click the “Tune” box and select the tune you want.

   The default tune is the sound of an alarm clock. You can hear each tune by selecting a tune and then clicking Play.

7. For “Message,” enter the message you want to appear.

   For example, “Meeting with David; bring new tapes for demo!”

8. For “Start,” enter the application you want to start or the file you want to open, when the alarm goes off.

   If necessary, click Browse for a listing of your files and applications to choose from.

9. (Optional) If you don’t want the alarm to display, click “Display alarm” to deselect it.

10. Click OK to confirm your alarm settings.

11. Click OK.

Tip You can recognize entries which you set alarms for by displaying the alarm symbol next to entries (except Planner events) in your Organizer section. If you haven’t set your Organizer section to show the alarm symbol next to your Organizer entries, choose one of the following commands, depending on what section you’re in: View - Calendar Preferences, View - To Do Preferences, View - Calls Preferences, or View - Anniversary Preferences. Under “Options,” select the alarm symbol, and click OK.

Responding to an alarm

When your alarm goes off, the Alarm dialog box appears, unless you deselect the Display alarm option when you set the alarm.

1. Select “Snooze for” by clicking + (plus) to increase or - (minus) to decrease the number of minutes to reset the alarm to go off again at another time. (The default is 5 minutes).

2. Click Turn To to turn to the entry for which the alarm was set.

3. Click OK to close the Alarm dialog box.

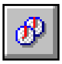
   Note If you selected “Start” when you set an alarm, Organizer starts the application you specified when you click OK. If you deselect this option, Organizer cancels starting an application when you click OK.

Canceling an alarm

You can cancel an alarm that you set.

1. Edit the entry that you set an alarm for.
2. Click Alarm.
3. Click Cancel Alarm.
4. Click OK to confirm your selection.
5. Click OK.

Creating an entry to repeat at intervals you select



You can create Calendar appointments, To Do tasks, Calls entries, Planner events, and Anniversary entries to repeatedly appear in your Organizer section. For example, you can create weekly meetings in Calendar, bi-weekly tasks in To Do, daily phone calls in Calls, and so on.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Repeating entries, creating

3. Click Display.

Deleting or changing a repeating entry

When you delete or change a repeating entry, the deletion affects the repeating entry as it represents one specific group of repeating entries. The deletion or change doesn't affect all repeating entries in Organizer. Let's say you have an appointment that repeats every third Tuesday, and another repeating appointment that occurs every Friday, and you decide to delete or change the first repeating appointment (every third Tuesday). Only those appointments for every third Tuesday are affected; the repeating appointment that occurs every Friday isn't affected.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Repeating entries, deleting

3. Click Display.

Linking Organizer entries

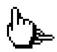
You can create links between discrete pieces of information in different Organizer sections or between entries in the same section. Creating links lets you cross-reference associated Organizer material. For example, you can link an appointment in your Calendar to a person in your Address section for 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 then to a Notepad page that lists the appointment's agenda.

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. 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 home page on the Web.

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.

Creating one or multiple links

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 a hand with a partial link.
3. Select the information you want to link, for example, a To Do task.

   The pointer changes to a hand holding a complete link.
4. Locate the information you want to link to, such as an Address record.

   
5. Click the entry you want to link to.

   When you select the entry you want to link to, Organizer places the link symbol next to each entry you clicked.
6. Repeat steps 1 - 5 above to create more links.

Tip You can also create a link between two or more selected entries. Click the first entry you want to link; then press and hold **CTRL** as you click any additional entries you want to link to. You can also choose Create - Organizer Link to create a link between two or more selected entries.

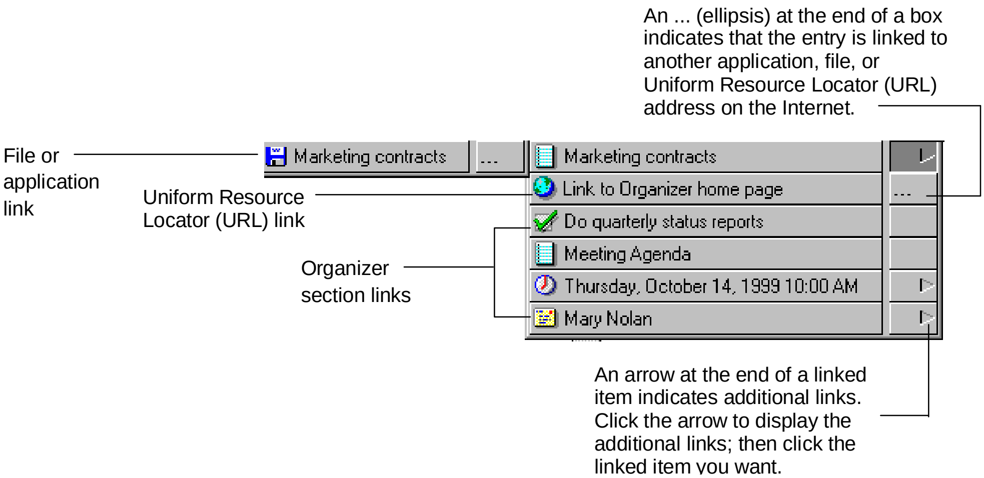
Seeing what a link is connected to

You can quickly see what a link is connected to in what is called a Link menu. A **Link menu** is a rectangular box that displays the link's description, the Organizer section the linked information is in, and whether the linked entry contains more than one link. If there is more than one link, there are several rectangular boxes — one box for each link. You can use the Link menu to navigate through linked information by clicking the description of the linked information you want to go to.

1. Go to the linked entry and click the link symbol next to the entry.

   One or more rectangular boxes appear.

2. From the Link menu, click the link you want more information on.



   Organizer goes to the linked item you select.

   You can remove the display of the Link menu by clicking anywhere on the page.

Changing the order of links

You can change the order in which your linked entries and descriptions appear. For example, you can display your links by the date each entry was created, rather than in the order in which you created the links.

For more information

For more information on changing the order of links, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, links

3. Select the index entry you want, and click Display.

Displaying a list of Notepad links on a Notepad Links page

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.

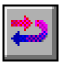
For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Links, links page in Notepad
3. Click Display.

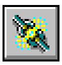
Deleting or “breaking” links

You can delete any link you create. When you delete a link, you don’t delete information, you only remove the link.



You can undo breaking a link by choosing Edit - Undo Link Delete before you perform another action.

1. Go to the information you want to remove the link for.



2. Click the Broken link icon in Toolbox.

   When you move the pointer over the link symbol you want to break, it changes to a hand holding a broken link.

3. Click the link symbol 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, the link symbol no longer appears next to the entry.

Tip 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.

Linking information with other files and applications

You can create a link from information in Organizer to other files and applications so those files and applications are accessible in the context of your daily work. For example, you can link a scheduled budget appointment to a spreadsheet that contains budget forecasts. For information about creating Uniform Resource Locator (URL) links, see “Creating Internet Links,” later in this chapter.

1. Select the Organizer information you want to link.
2. Choose Create - File Link.

3. For “Link description,” enter a description of the link.
4. For “File,” enter the path and file name of the file you want to link to.

   If necessary, click Browse to see the Organizer files available to you.

   To link to an application’s file, specify the path to the application’s executable file, followed by a space; then the name of the file.

   For example, C:\123R5\PROGRAMS\123W.EXE BUDGET.WK4.
5. Click OK.

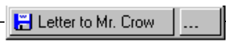
Accessing another file or a linked application

You can access another 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’s linked to the file, application, or URL you want.

2. Click the link symbol.

   The Links menu appears. Any link to another 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.
4. When you finish with the external file, application, or URL, choose

   File - Exit or switch back to the Organizer window.

   Tip To switch between Organizer and any open Windows application, press **ALT+TAB**.

Some applications don’t let you run more than one copy of the application at a single time. Also, if you select a link and nothing happens, the application may already be running.

Changing a link’s description, file name, or application to link to

You can change the description or file name of any link to another file, application, or Uniform Resource Locator (URL).

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, links to external files or applications
3. Click Display.

Working with 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.

Although Organizer includes a number of common categories, including Clients, Expenses, Issues, and more, you can create or customize your own categories. For example, you can create a category for all entries that apply to a particular project, and then assign the entries in various sections to that category. You can then easily view and work with all appointments, To Do tasks, Calls entries, and other entries that pertain to a particular project.

For more information

For more information on assigning, creating, customizing, deleting, or displaying a category, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Categories
3. Select the index entry you want, and click Display.

Using customer and cost codes

Customer and cost codes let 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. You create your own customer and cost codes and then assign them to entries in your Calendar, To Do, Calls, Planner, and Anniversary sections.

Let's say MCR Consulting is one of your clients. You can create a customer code for MCR Consulting, as MCR, and a cost code, as $50.00 per hour. At the end of the month, you can estimate monthly billing for MCR Consulting based on the customer and cost code you assigned.

For more information

For more information on creating, renaming, removing, assigning, or displaying entries with a cost code, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Cost codes
3. Select the index entry you want, and click Display.

Searching for information in your Organizer entries

You can find specific text in any Organizer section by entering the same text contained in the entry you want to find. You can find text from any section of Organizer. For example, you can find text from any field of any Address record you're looking for, such as name, company, notes, and so on.

1. From any Organizer section, choose Edit - Find.

   Tip You can also press **CTRL+F** to search for text in an Address record.

2. For "Find," enter the text you want to find.
3. Under "Options," select the options for how you want Organizer to find your information.

Option	*Result*
Case sensitive	Searches for an exact text match, including the same capitalization. For example, if you search for the name Smith, Organizer won't find smith.
Whole word	Searches for whole words, specifically, not just the first few letters of a word. For example, if you search for the word plumber, you must use the whole word, not plumb.
Section	Searches for a text match in the Organizer section you specify.
All sections	If you go to the section in which you want to look for text, the default will be to look in that section.

   Organizer searches for exact text by default.

   If you don't select the case sensitive or whole word option, the default is to search for any text you enter, regardless of case sensitivity or whole word status.

4. Click one of the following command buttons.

Command button	*Result*
Find Next	Finds one entry at a time for you and turns to that entry within which the specified text appears.
Find All	Finds all entries within which the specified text appears, and lists them in the "Occurrences" box.

   If no match is found, Organizer displays a message saying that the text you're searching for can't be found.

5. To go to an entry you want to see, double-click the entry in the "Occurrences" box.

   "Occurrences" displays your entries that match your search in either of two ways: one text match at a time or all text matches in a list.

Tip You can also select the entry in the list box and click Turn To to go the entry.

6. Select one of the following options.

Option	*Result*
Clear list	Clears the list after each text search is completed (default).
Append to list	Maintains a list of all text search matches.

7. When you finish searching, click Close.

Using filters

You can use filters to display a subset of your Organizer entries based on criteria you specify. You can base your criteria on text, numbers, dates, Organizer attributes (such as a category or cost code), or any combination of these. For example, if you want to prepare a mailing, 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. You can save the filters you create, and you can also add them to the Organizer menu under the View - Apply Filter menu, so you can quickly switch between a filtered view and a view of all entries.

Organizer works the same way whether you're 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 before you set the filter.

Note If you're using Organizer 97 GS with group scheduling (.NSF) and 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." For more information on granting access to Notes mail files, see Notes Help.

Creating a filter

You must create a filter before you apply it.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Filters, creating

3. Click Display.

Applying a filter

You can apply a filter when you create it, or whenever you need to apply the filter.

Note 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. 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.

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 until you apply the filter again. For example, if the current filter displays all Calendar appointments earlier than November 14, and you create an appointment on November 15, the appointment for November 15 will appear until you apply your filter again.

Note If you're using Organizer 97 GS with group scheduling (.NSF) and 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." For more information on granting access to Notes mail files, see Notes Help.

1. Choose Create - Filters.
2. Under "Filters," select the filter you want to apply.
3. Click Apply.

Clearing a filter

To clear a filter so that Organizer redisplays all entries in all sections, while keeping the filter to use at a later date, choose View - Clear Filter. You can also choose Create - Filters, select (None), and then click Apply.

Removing a filter

Caution You can't undo deleting a filter.

1. Choose Create - Filters.
2. Under "Filters," select the filter you want to delete.
3. Click Remove.
4. Click Yes when Organizer asks whether you want to delete the filter.
5. Click Close.

Compacting Organizer files

You can compact your files on a periodic basis to ensure they remain the smallest size possible. When you compact a file, Organizer actually reduces the size of the file on disk.

Note You compact your Notes mail file in Notes. For more information on compacting your Notes mail file, see Notes Help.

Compacting an Organizer 97 GS (.OR4) file

Note You cannot compact an open file.

1. Start Organizer 97 GS.

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 Organizer 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 GS File Compact dialog box reappears.
9. (Optional) To compact additional files, repeat steps 2 - 7.
10. Click Exit when you're finished compacting files.

    This closes the Lotus Organizer 97 GS File Compact dialog box.
11. Click File - Exit Organizer to leave Organizer.

Archiving Organizer information

To keep your Organizer file size manageable, you can archive information you don't need on a day-to-day basis. For example, you can archive old To Do tasks or Calendar appointments.

When you archive information from a file, Organizer deletes the information from your file and stores the archived information in a separate .OR4 file. You can still access this archived information because you can open the archive file. However, the archived information will no longer appear in your original Organizer file.

Note You can only archive a file for which you have Owner access. If you have Assistant or Reader access, the menu item for Archive is unavailable.

The archive file includes all alarms, cost codes, and categories made in the original file. Entries that were repeating still appear in the archive file but they're no longer designated as repeating and they no longer include the repeating entry symbol.

You can archive more than one section in a single archive file, although you must perform a separate archive operation for each section you archive.

Note You archive your Notes mail file in Notes. For more information on archiving your Notes mail file, see Notes Help or your system administrator.

1. Choose File - Archive.

   Tip You can also press **CTRL+A** to archive information.

2. If you haven't saved changes to your file, Organizer asks you if you want to save the file. Click one of the following command buttons.

Command button	*Result*
Yes	Saves your changes to the file and then closes the file.
No	Closes the current file without saving your changes.
Cancel	Returns to the current file without closing or saving it.

3. Click the "Section" box and select a section from which to archive entries.

4. Under “Range,” select one of the following options.

Option	*Result*
All	Archives all entries in the section you select.
Before	Archives all entries prior to the date you select in the section you select. Organizer archives entries as follows: appointments or anniversaries that occur before the date you select; completed To Do tasks whose due date occurs before the date you select; Planner events with an end date before the date; Calls entries made before the date you select; Notepad entries entered before the date you select.

5. For “Archive file,” enter a name for your archive file.

   A file name can contain up to 255 characters, including spaces, but it can’t contain any of the following characters: \ / : * ? “ < > |

   If necessary, click Browse to see the Organizer files available to you.

6. (Optional) Select ”Compact file after archive“ to compact your file after you’re finished archiving the file.

   Note If the file you’re archiving allows more than one person to have the file open at the same time, you must be the only user with that file open to compact the file after archiving.

7. Click OK.

8. Repeat steps 1 - 7 for any other sections you want to archive.

Importing and exporting information with Organizer

When you import or export information, you’re copying one application’s file and all of its information to another application’s file. For example, you can import Address records from a database application directly into your Address section; or you can export Notepad entries to another application, such as a word processor.

For more information

For more information on importing information with Organizer, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.

2. Type this phrase:

   Importing entries

3. Select the index entry you want, and click Display.

Exporting

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, such as ASCII (*.TXT), ANSI Text (*.TXT), dBASE (*.DBF), and FoxPro (*.DBF) formats. Many applications support the ASCII and dBASE file format.

To export a subset of information, apply a filter to the section before you export the information. See Help for more information on filters.

For more information

For more information on how to export Organizer information, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Exporting, exporting entries

3. Click Display.

Using and managing field mapping

When you map fields while you're exporting or importing, you're selecting which fields in a file to copy to which locations in another file.

You can map all fields, or you can map specific fields. For example, you can import a file from an application or export a file to an application whose fields are named differently from the fields in Organizer. You can also import or export only a portion of the information contained in the import or export file, such as a person's name and telephone number.

Let's say you're exporting a business Address record, and the file you're exporting to has a field named "Field 1 - Business position." You can map the Organizer section field (named "Job title") to the export file field (named "Field 1 - Business position").

If you import or export the same type of information from or to the same applications on a frequent basis, the fields you map to are always the same. When you map fields with Organizer, you can save the field-mapping connections you created to avoid repeating the actual field map.

For more information

For more information on how to map fields for importing and exporting, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Mapping fields, while importing or exporting entries

3. Click Display

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 and the 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.

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. See Help for more information about embedding an OLE object.

For more information

For more information on Organizer and the Internet, including the Lotus home page, the Lotus Customer Support home page, and the Lotus Customer Support FTP site, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Internet, overview

3. Click Display.

Creating Internet links

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 home page 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 link.
4. Under "URL," enter the URL (the path) to the Internet address you want to link to.

   For example, http://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.

Selecting Lotus Internet sites

To automatically access Lotus sites, choose Help - Lotus Internet Support and one of the commands shown below.

Command	*Result*
Lotus Home Page	Goes to the Lotus home page.
Lotus Support	Goes to the Lotus Customer Support home page.
Lotus FTP site	Goes to the Lotus FTP Site.

Using TeamMail

TeamMail works with your current electronic mail system to send and receive mail messages from within Organizer. TeamMail uses the mail system installed on your computer to create and send messages to one or more people. TeamMail supports cc:Mail™, Lotus Notes, and other e-mail systems including VIM and MAPI-based systems.

Using TeamMail you can do the following tasks:

- 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.

Note To use TeamMail in Organizer, you don't need to close Organizer.

For more information

For more information on using TeamMail, refer to Help (online documentation).

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamMail, sending messages
3. Click Display, select the appropriate topic, and click Display again.

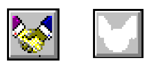
Chapter 14
Using Group Scheduling

You can use the Organizer Calendar section 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.

You must have Notes 4.51 or later installed on your computer in order to use group scheduling in Organizer. Notes doesn't have to be running when you're performing Organizer group-scheduling tasks. One easy way to check if you're installed for group scheduling is to look for the Meeting notices icon in Toolbox. If the Meeting notices icon shows a pair of shaking hands, then you're ready to use the group-scheduling features. If the Meeting notices icon doesn't show the shaking hands, you should see your system administrator or refer to Chapter 2, "Installing Organizer."

Ready for group scheduling



Not ready 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.

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.

Setting up Notes for Organizer group scheduling

Organizer uses settings in your Notes mail file for group scheduling. 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 meeting notices. You can also set up autoprocessing only for invitations 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.

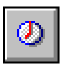
To specify a profile for a room or resource, you must create or have access to a Notes Resource Reservations database. See your Notes administrator or the Notes Help system for more information on creating resource profiles in a Resource Reservations database.

Scheduling group meetings

The process of scheduling a group meeting lets you view the free time of others you want to invite and choose a free time slot convenient for everyone. You can also reserve a conference room, set up a repeating meeting, or even send file attachments, such as an agenda or a budget spreadsheet, along with the meeting invitation. If another user has given you permission to manage their calendar, you can schedule a meeting for someone else.

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.

   Tip You can also choose Create - Appointment or press INS when you're in the Calendar section to display the Create Appointment dialog box.

   Note You can 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.

2. If necessary, click the "Date" box and select a date for the meeting.

   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.

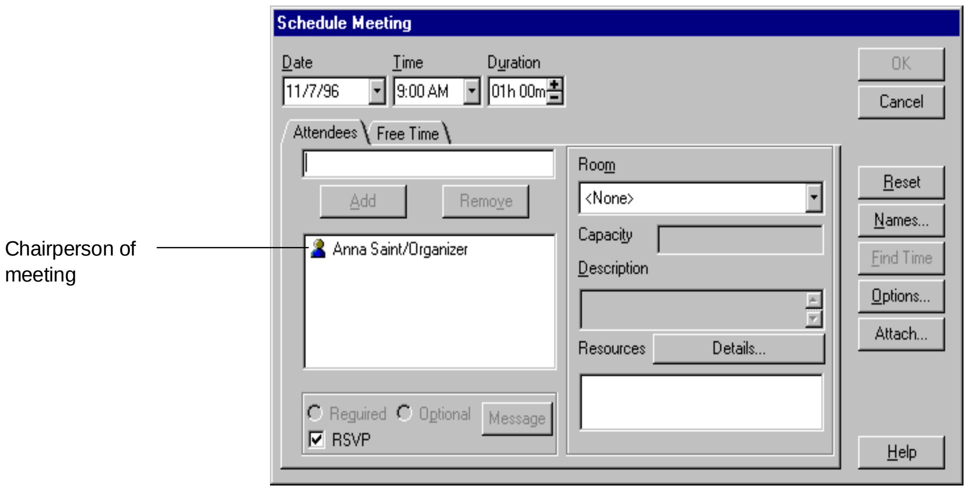
3. If necessary, click the “Time” box to use time tracker and select a time for the meeting to start and end.

   If necessary, click the “Duration” + (plus) to increase or - (minus) to decrease the duration of the appointment.

4. Under “Description,” enter a description of the meeting.
5. Click Invite.
6. 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 if you want to receive responses to your invitation from the person.

   To enter a name 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.

You can specify whether the 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.

You can also 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 will not affect the occurrence of the meeting.

Tip You can only invite people to meetings whose names appear in a Notes 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 Notes 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.

Note 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. When you select a group name, Organizer asks if you want to expand the group. If you click Yes, Organizer adds each group member to the attendee list.

7. (Optional) Click the “Room” box to select a room to hold the meeting.

   You can only select rooms and resources for which profiles exist in 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.

8. (Optional) Click Details above the “Resources” box to select resources for the meeting.

   When you click Details above the “Resources” box, Organizer displays the Resources Details 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.

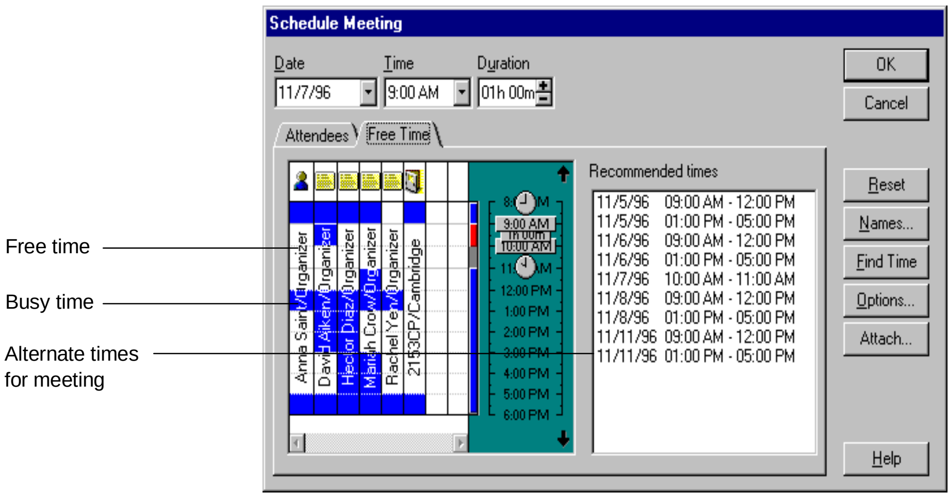
9. (Optional) To include an attachment with the meeting invitation, click Attach.

   For more information, see “Sending an attachment with a meeting notice,” below.

10. (Optional) If you want to make sure all attendees and the room are available for the meeting, click the Free Time tab.

    Organizer displays the room name and each attendee name in vertical time bars and displays information about each attendee’s free and busy time. The time bar colors represent the following information:

Color	*Meaning*
Blue	Indicates a person’s busy time.
White	Indicates a person’s free time.
Gray	Indicates a person’s free and busy time is unavailable.
Green	Indicates the proposed meeting time is free for all required attendees.
Red	Indicates at least one of the required attendees isn’t free at the proposed time.



See “Finding a time for a meeting,” below, for more information on resolving meeting conflicts.

Note If the time bar for an attendee is dimmed (appears in gray), 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 isn’t a Notes user.

11. (Optional) To change scheduling options, click 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. See “Changing scheduling options,” below, for more information.

    When you’re finished changing scheduling options, click OK.

12. Click OK to close the Schedule Meeting dialog box.

13. (Optional) Select any appointment options for the meeting (for example, if you want to assign an alarm, cost code, or category to the meeting, or make it a repeating meeting).

    See Help for more information on alarms, categories, and cost codes.

14. Click OK.

Organizer sends a meeting notice and Notes mail message to each attendee, requesting that they attend your meeting.

Note 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 acceptance or decline messages) and attendees only have the option of either adding the meeting to their Calendar or deleting the invitation.

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 has included your name in their Notes Delegation Profile.

2. Choose File - Open.
3. 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. Select your name.
8. Click OK.

The Organizer meeting notice and Notes mail message sent to each attendee will include the name of the person for whom you’re scheduling the meeting first, and then your name in parentheses afterward.

Finding a time for a meeting

If while viewing free time you see there is 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.

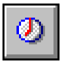
  You can click Options to change the options in the Schedule Meeting Options dialog box. See "Changing scheduling options," below, for more information.
- Click in the "Recommended times" box to select a time.

  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.

Sending an attachment with a meeting notice

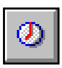
You can include an attachment with a meeting notice as you're scheduling a meeting. You can't add an attachment to a meeting you have already created.



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. Select the attendees and, if available, the room and resources for the meeting.
5. Click Attach.
6. Specify the name of the first file to attach.
7. (Optional) If you want to attach any other files, click Add.
8. (Optional) Specify the name of any other files you want to attach and click Add.
9. When you're done specifying files, click OK to return to the Schedule Meeting dialog box.
10. Click OK to return to the Create Appointment dialog box.
11. (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).
12. Click OK.

Changing scheduling options

Scheduling options determine how Organizer sorts attendee lists and 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 when you display attendees on the Free Time tab.

Option	*Result*
Show individual attendee's 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.

7. Under “Find time,” select the options you want Organizer to use to try to find time for a meeting.

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.

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).

    See Help for more information on alarms, categories, and cost codes.
11. Click OK.

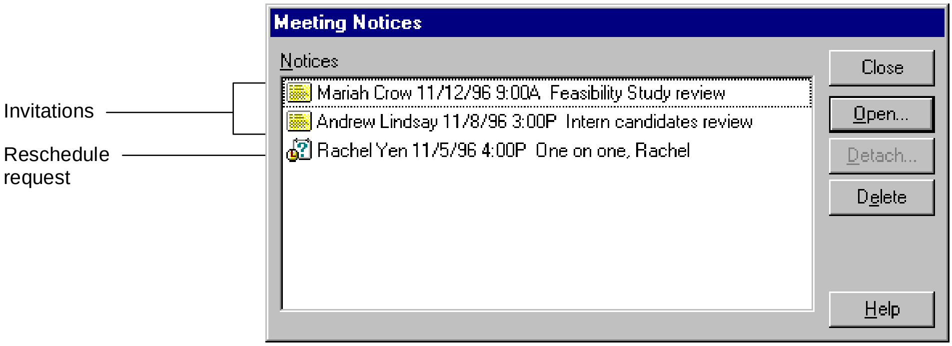
Responding to meeting invitations

When you receive a meeting invitation, you can accept, decline, delegate the meeting to someone else, or send a proposal rescheduling the meeting to a more convenient date or time. If the meeting invitation includes an attachment, you can view or save the attachment while you are processing the invitation or after you add the meeting to your calendar.

Accepting an invitation

The hands in the Meeting notices icon shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.



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

   Tip You can also open a meeting notice by selecting it and clicking Open.

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

   Note Click Turn To from 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.

4. (Optional) To specify the way the meeting appears in your calendar, click the Meeting tab.

   You can modify the description of the meeting, but you can't change the date, time, or duration of the meeting. You can also set an alarm or cost code for the meeting, as well as the following options.

Option	*Result*
Categories	Lets you establish one or more categories for the meeting.
Warn of conflicts	Alerts (default) or doesn't alert you when there's 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.

Note If you select the Pencil in option, Organizer adds the meeting to your calendar with a pencil symbol when you click Accept and sends a tentative acceptance to the chairperson. You can later accept or decline the meeting. A meeting you've penciled in doesn't appear as booked when others view your free time.

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.
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.

Tip 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 meeting, or Close if you don't plan to attend. The chairperson won't receive notification in either Notes or Organizer.

Note 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. to remind you of the correct time in the time zone in which you will be attending the meeting.

Declining an invitation

The hands in the Meeting notices icon shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.
2. Under "Notices," double-click a meeting invitation to open it.
3. Review the details of the meeting on the Invitation tab.
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.

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.

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 the Meeting notices icon shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.
2. Under “Notices,” double-click a meeting invitation to open it.
3. Review the details of the meeting on the Invitation tab.
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).

   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.
7. (Optional) To confirm that the appointee is free during the meeting time, click the Free Time tab.
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.

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 the Meeting notices icon shake when you receive a meeting invitation.

1. Choose File - Meeting Notices.
2. Under "Notices," double-click a meeting invitation to open it.
3. Review the details of the meeting on the Invitation tab.
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.

   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.
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.
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.

The proposed reschedule is sent as both a Notes mail message and an Organizer meeting notice. Organizer enters the meeting in its original date and time in your calendar.

The chairperson can accept or decline your proposed change. If it's accepted, each attendee, including yourself, will be sent an Organizer meeting notice and Notes mail message proposing the change. If it's declined, you'll receive an Organizer meeting notice and a Notes mail message.

Tip 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.

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 files.
6. Click Detach.
7. (Optional) If a file already exists with the same name as the file you're detaching, enter a new name for the file you're detaching and press **ENTER**, or click another button.

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.

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. When you click the link symbol, the following options appear to launch or detach the attachment.

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 with which you can detach the file.

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.

Tip You can also delete a meeting by selecting it and pressing Delete.

Managing meetings

As chairperson, you receive a Notes mail message informing you when an attendee accepts, pencils in, declines, or delegates a meeting. You receive a Notes mail message and an Organizer meeting notice when an attendee proposes a change to a meeting you proposed. You can check the status of attendees in Organizer without opening your Notes mail messages.

As chairperson, you can confirm, change, or cancel a meeting. You can also respond to proposed changes.

Checking the status of attendees

1. Go to Calendar.
2. Select a meeting.
3. Choose Appointment - Status.
4. Review the status icon that appears with each attendee’s name.

Icon	*Status*
	Attendee was sent an invitation to the meeting.
	Attendee accepted an invitation or appointee accepted a delegated invitation.
	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).

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.

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.

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.
5. Click OK.

The edited meeting appears in your calendar, and Organizer sends attendees a meeting notice and Notes mail message informing them of changes.

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 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.

Canceling a meeting

1. Go to Calendar.
2. Drag and drop a meeting to Trash in Toolbox.

Organizer sends a meeting notice and Notes mail message to all attendees who didn't decline the meeting informing them that the meeting is canceled.

Responding to proposed meeting changes

If an attendee proposes a different time for a meeting, you receive both an Organizer meeting notice and Notes mail message. You can accept or decline the proposed change.

1. Go to Calendar.

2. Choose File - Meeting Notices.

3. Double-click a meeting response in which the attendee proposes a meeting change.

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.

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.

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.

9. Click OK.

10. If you're done processing meeting notices, click Close.

Note Click Turn To from the Invitation or Meeting tab to look at the appointments already scheduled for the day of a meeting to which you have received a reschedule proposal. Organizer turns to the day of the meeting in your calendar, and the dialog box remains visible so you can select a response.

Working remotely with the group-scheduling version of Organizer

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 on your notebook computer, a message may appear asking you to confirm 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.

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 meeting 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 doesn't 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.

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