

USER'S GUIDE

Organizer Release 1

COPYRIGHT

Under the copyright laws, neither the documentation nor the software may be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable form, in whole or in part, without the prior written consent of Lotus Development Corporation, except in the manner described in the documentation.

© Copyright 1992,1993 Lotus Development Corporation
55 Cambridge Parkway
Cambridge, MA 02142

All Rights Reserved. First Edition Printed 1992. Printed in Ireland.

Lotus Organizer is a trademark of and SmartIcons is a registered trademark of Lotus Development Corporation. Hayes is a registered trademark of Hayes Microcomputer Products, Inc. Microsoft is a registered trademark and Windows is a trademark of Microsoft Corporation. Metafile is a registered trademark of Donald H. McNeil.

What is Lotus Organizer?

Lotus Organizer™ is a lot like the paper-based organizer you may already use to manage your time and work -- only it's much more powerful, and a lot more fun to use.

It's a diary, group meeting scheduler, to-do list, planner, address book, notepad, and anniversary reminder -- all in an on-screen notebook with a tab for each section and pages you can turn.

About this Booklet

This booklet will serve as a guide as you explore Lotus Organizer. Use it to:

- Understand the purpose of each of the Organizer components and try out each one.
- Get ideas about how the Organizer can help you in your own work.
- Learn a number of ways to use the extensive on-line Help.

This booklet is designed to encourage you to try various features of the Organizer. The Help system is a comprehensive resource that can provide detailed instructions.

Getting Started

1. From your Windows Program Manager, double-click the Organizer icon to start the Organizer.
2. Click one of the six tabs in the notebook. The next few pages of this booklet show you the six sections of the Organizer.
3. Follow the steps in this booklet for the section you've turned to. Then try some of the suggested activities beneath each picture. Don't be discouraged if you can't do all of them; just look for the information you need in the Help system. (Detailed instructions on using Help appear on pages 12 to 13.)

This booklet assumes that you are using a mouse; however, if you do not have a mouse, you can use the standard Windows keyboard equivalents. The Help system includes a section called "Keyboard Shortcuts" to help you out.

Note The Organizer automatically saves your work whenever you make a change. If you are running the Organizer as a standalone program, changes are saved to a file with the extension .ORG. If you have group scheduling enabled, changes are saved to a file on the network with your user name. On a network, it's a good idea to protect access to your files by using the File/Passwords command.

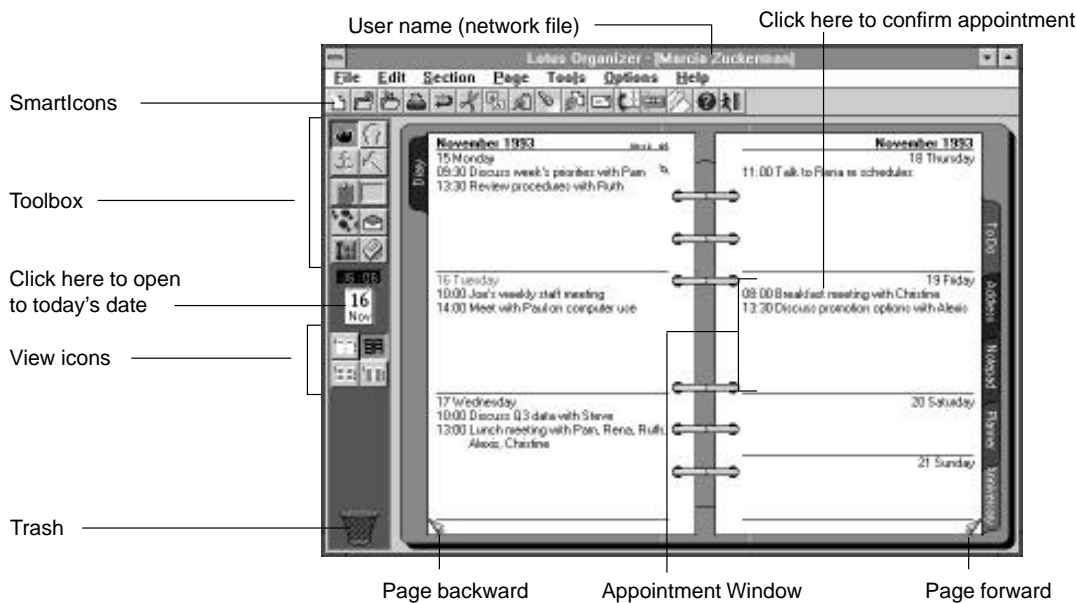
To leave the Organizer, choose File/Exit.

2 Lotus Organizer: An Overview




Diary

Turn to the Diary section and follow these steps. The first page is a Diary of the current year.

1. Click today's date in the Diary (or the icon at the left of the screen) to see the page that includes today's appointments.
2. Click anywhere in the block with today's date to insert an appointment for today.
3. Click on a time and type the details of an appointment. Click when you finish.
4. Enter a few more appointments. Delete one by dragging it and dropping it in the Trash (wastebasket).



Experiment with some of these additional tasks.

- Move an appointment by dragging it and dropping it on another day.
- Set an alarm for an appointment using  in the appointment window.
- Display your diary in different formats using the View icons.
- Move an appointment to another page (select , click on the appointment, turn the page, and click the new date). When you finish, select  in the Toolbox.


- Change the start and end of your work day (choose Options/Diary and drag the clocks in the TimeTracker).

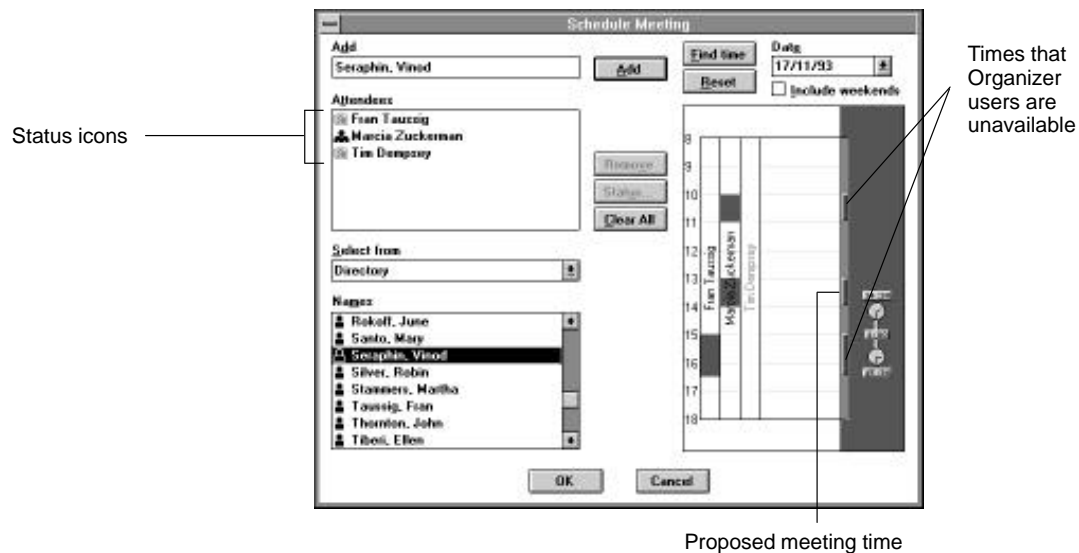
Scheduling Meetings

You can use the Organizer to schedule meetings with groups of people who are mail users on your local area network (LAN) or on other LANs. If you plan to use the Organizer for group scheduling on the network, and you want to use the same Organizer file on a laptop computer, contact your network administrator. The Organizer uses cc:Mail to send meeting invitations to the people you invite.

Each person invited to a meeting can accept, decline, or delegate the invitation to another person. When you schedule a meeting, you become the chairperson of the meeting. (If you are scheduling meetings on behalf of other people, contact your network administrator.)

To schedule a meeting, turn to the Diary and follow these steps.

1. Click the date and time for the meeting; if necessary, adjust the meeting duration with the TimeTracker.
2. Type the text for your meeting. The first line of text appears in the subject line of the mail message sent to your invitees.
3. Click . Log into cc:Mail, if you are prompted to do so. The Organizer displays the Schedule Meeting dialogue box.






4 Lotus Organizer: An Overview

4. Select each person you want to invite by double-clicking the name or highlighting it and selecting Add.

As you select names, a time bar appears, showing the invitee's schedule in red (black on a monochrome monitor). The meeting you are scheduling is in green (grey on a monochrome monitor).

If the time you initially selected creates a conflict for someone you want to invite, change the meeting time by dragging the TimeTracker. Choose **Find time** to have the Organizer find the next available free time for all the attendees. Choose **Reset** to revert to the original time and date of the meeting.

Beside the names of each of the people you invite to the meeting appears , showing that a mail message will be sent. Beside your own name is , indicating that you are the chairperson of the meeting.


5. When you are satisfied, choose **OK** to leave the Schedule Meeting dialogue box, and click  to send the meeting invitations.

Experiment with some of these additional scheduling features; they are all available when you are in the Schedule Meetings dialogue box..

- Change an invitee's status manually in the Schedule Meeting dialogue box by selecting the name and choosing Status. You may want to do this if someone tells you in person or on the telephone that they accept or decline.
- Change a meeting time using the Time Tracker in the Schedule Meeting dialogue box. The Organizer sends mail to all the invitees (including those who declined) informing them of the changed time.
- Choose **Remove** to remove a name from the list of attendees. **Clear All** removes all the selected names so you can start again.

To cancel a meeting that you've scheduled, drag it to the Trash. The Organizer sends mail to all the invitees who did not decline the meeting to inform them that the meeting has been cancelled.

Meeting Status

If an invitee accepts your invitation to a meeting, the status icon next to that name in the Schedule Meeting dialogue box changes to a .

If an invitee declines, delegates, or proposes a change to the meeting, you will receive a message in your cc:Mail Inbox. Once the message is received, the status icon in the Schedule Meeting dialogue box changes to one of the following:

<i>Icon</i>	<i>Status</i>
	Invitee has declined
	Invitee has delegated invitation to an appointee
	Appointee has been sent invitation
	Appointee has accepted
	Appointee has declined

Responding to Meeting Invitations

When another user wants to schedule a meeting with you, you receive a meeting invitation in your cc:Mail Inbox. (If you are not a cc:Mail user, invitations are forwarded through other mail systems.) You can recognize meeting invitations by the word "Invite:" at the beginning of the subject line. When you open the invitation, double-click the Organizer icon (invite.org) to respond.

Double-click here to respond to the meeting invitation



6 Lotus Organizer: An Overview

You can accept the meeting, decline it with a reason, or delegate it to someone else with a reason.

- To accept, choose **Accept**. The meeting is automatically entered in your Diary.
- To decline, choose **Decline**. When the Decline Invitation dialogue box appears, type your reason for declining and choose **OK**.
- To delegate someone else to attend in your place, choose **Delegate**; when the Delegate To dialogue box appears, select the name of the person you want to attend the meeting and choose **OK**. Fill in the Delegate-Reason dialogue box when it appears, and choose **OK**. The Organizer forwards the meeting invitation to the person you chose, and sends a mail message to the chairperson indicating the action you took.

If you have a conflict at the time of the proposed meeting, you can resolve it and then accept the invitation.

1. Choose **Defer** to see your Diary.
2. Change the conflicting appointment(s). You can eliminate the conflict by leaving the appointment's start time but making the duration zero.
3. Choose File/Resume Deferred Meeting to go back to the Meeting Invitation dialogue box.

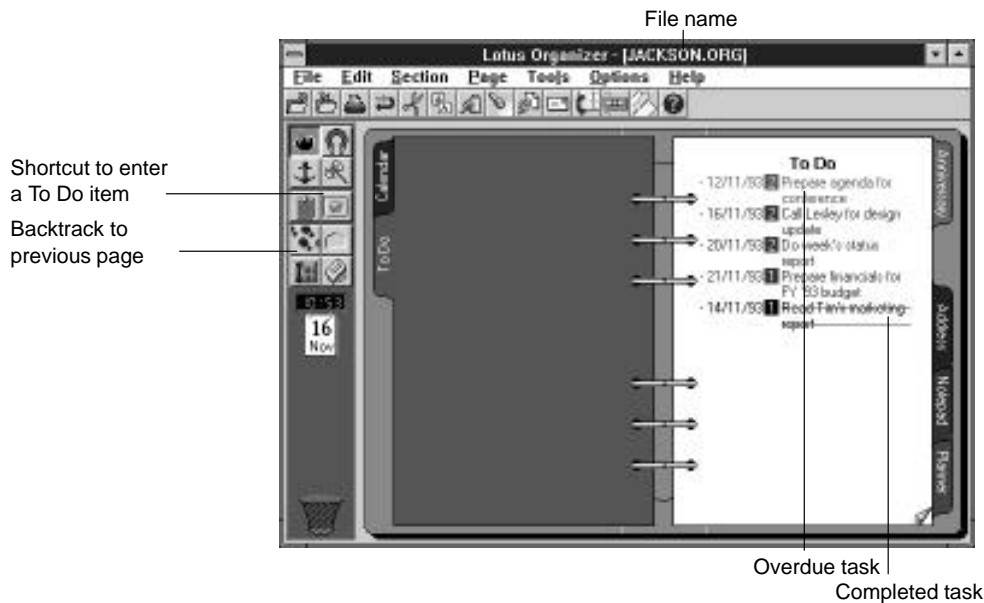
Experiment with these features as well.


- Change the meeting time in your own Diary. A mail message is sent to the chairperson, requesting the change.
- Decline a meeting you have already accepted by dragging the appointment to the Trash. The chairperson will be sent mail to say that you will no longer be attending.

To Do

Turn to the To Do section and follow these steps.

1. Click anywhere on the To Do page to display the To Do dialogue box.
2. Type a task, and give it a start date, due date, and priority. Click the down arrow beside the date boxes to choose the appropriate date(s) from the pop-up Diary.
3. Choose **OK** to enter the task.



Experiment with some of these additional tasks. Be sure  is selected in the Toolbox.

- Delete a task by dragging it to the Trash and dropping it in.
- Indicate that you have completed a task by choosing **Completed** in the To Do dialogue box.
- Enter an item with a due date that's in the past, and notice how the Organizer colour codes overdue tasks.
- Display your To Do items in the Diary by using Options/Diary, choosing **Show**, and selecting **To Do**.
- Create additional To Do sections (for example, for multiple projects) by using Options/Customise, selecting To Do, and choosing **Add**.

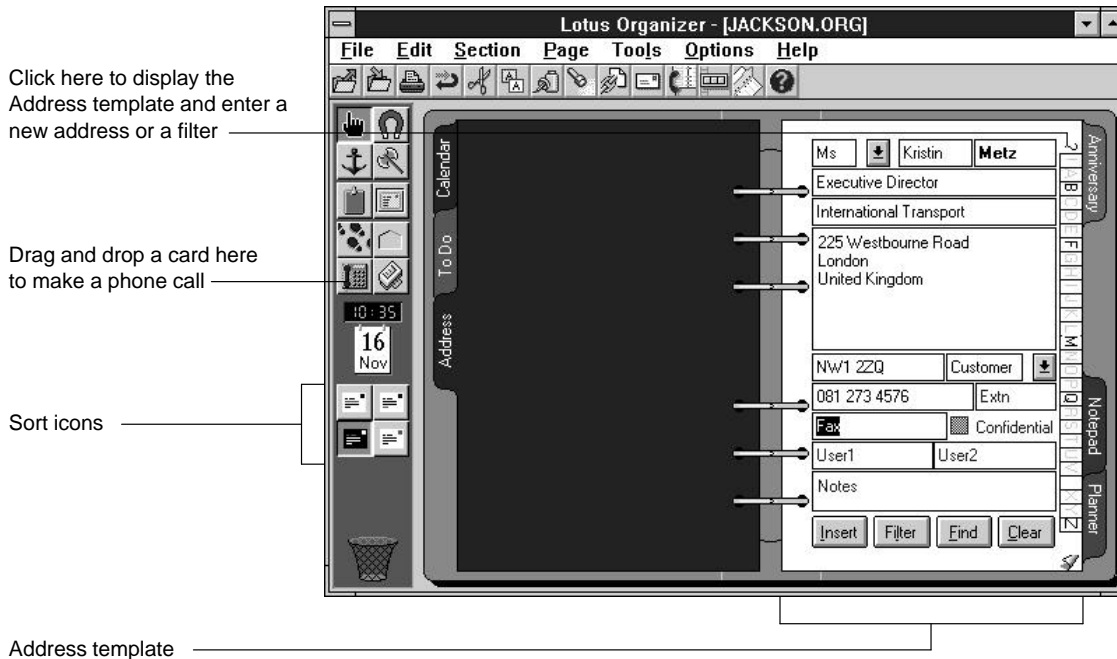
Address

Turn to the Address section and follow these steps. When you start, the Title field should be highlighted.


1. Type a title (e.g., Mr. or Ms.) for someone you want to enter.
2. Press **TAB** to move to the First Name field and type a first name. Continue entering information about the person, using **TAB** to move forward, and **SHIFT-TAB** to move backward.

8 Lotus Organizer: An Overview

3. When you finish entering information, choose **Insert**. The Organizer turns to the page with the new entry.
4. Click the ? index tab to display the address template. Enter information for a few more people.



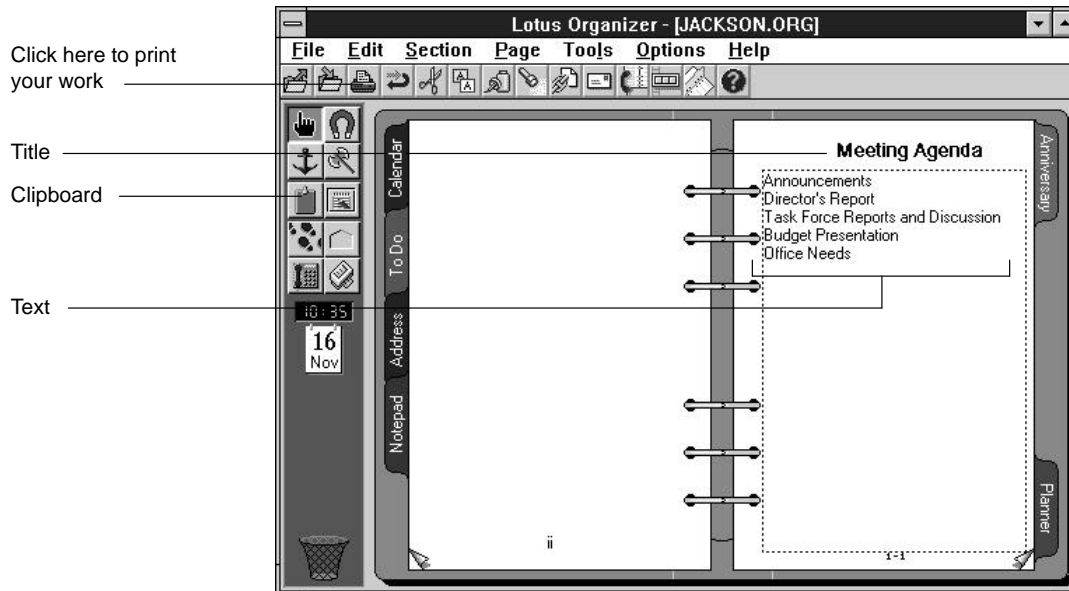
Experiment with some of these additional tasks.

- Edit one of the records you entered by clicking on the record you want to change, editing the text, and choosing **Update**.
- Display different information for each record using the View icons.
- See how you can make a telephone call if you have a Hayes®-compatible or autodial modem. (Drag and drop a card on  in the Toolbox.)
- Filter the Address section by typing the information you want to match in the Address template (for example, only records with the postal code NW1 2ZQ) and choosing **Filter**. To clear the filter, choose **Clear**.
- Sort your address section by postal code using Options/Address.


Notepad

Turn to the Notepad section and follow these steps.

1. Click anywhere on the Contents page of the Notepad to display the Notepad Page Insert dialogue box.
2. Give the page a title and choose **OK**.
3. Click the title on the Contents page to turn to the page with that title. Click anywhere on the page and type the text.
4. To save your text, click the page title.




Experiment with some of these additional tasks.

- Insert several pages at once by specifying a number for **Insert** in the Page Insert dialogue box.
- Create chapters within a Notepad section by choosing **Chapter** as a page attribute when you insert a new page.
- Use  in the Toolbox to pick up a page and move it to another place in the Notepad section.
- Copy a picture from another application and use the Windows clipboard to paste it into the Notepad. Specify **Bitmap** for **Type** and **Clipboard** for **From** in the Notepad Page Insert dialogue box.

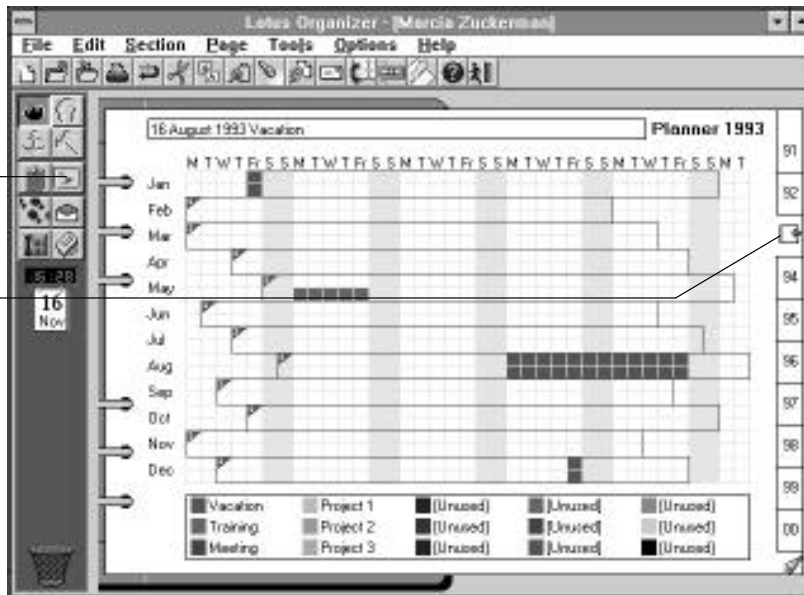
Planner

Turn to the Planner section and follow these steps. When you start, you see a folded Planner page for the current year.

1. Click  near the top right of the page to unfold the Planner.
2. Click the colour or pattern beside Holiday to schedule your holiday (the pointer changes to a block). Notice that the box in the top left corner displays the date as you move the pointer across the Planner.
3. Move the block to the first day of your holiday, and click and drag the block to the last day of your holiday.

Shortcut to add
a new event

Click here to fold the
Planner page



Experiment with some of these additional tasks.

- Schedule a Training session or a Meeting.
- Schedule an event in a different year.
- Shorten or delete an event by dragging some or all of the blocks into the Trash.
- Display your Planner events in your Diary using Options/Diary and choosing **Show**.

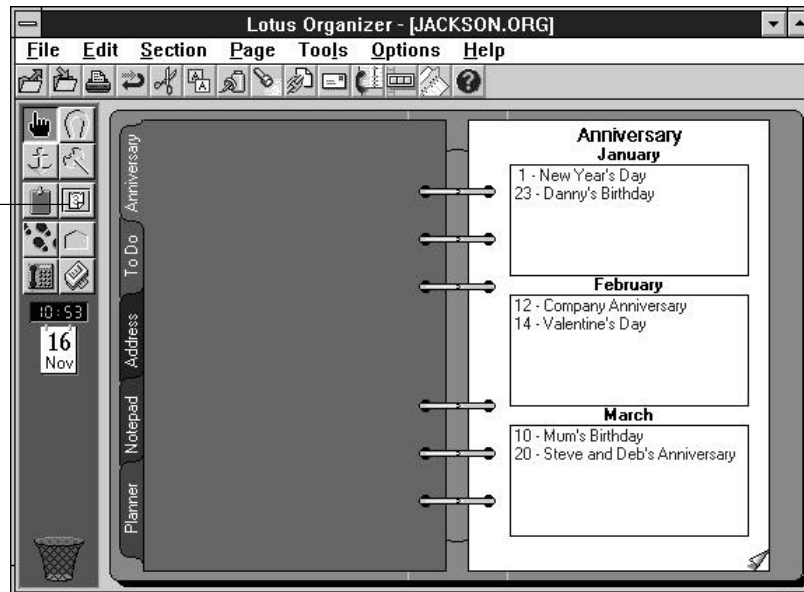
- Customise some of the Unused blocks to represent other events you want to keep track of, such as sick days or conference days, by clicking the text and changing the name.
- Allow appointments scheduled in your Diary to appear as single lines in your Planner using Options/Planner. (Select **Diary** for **Book time in** and then select **View Diary appointments**.)

Anniversary

Turn to the Anniversary section, which allows you to keep track of yearly events such as birthdays, holidays, and once-a-year tasks.

1. Click on the month for which you want to enter an anniversary.
2. Enter the date for the anniversary, and then type the description.
3. Choose **OK** to enter the anniversary.

Shortcut to enter an anniversary




Experiment with these additional tasks.

- Edit an anniversary.
- Turn to the page in your Diary that corresponds to an anniversary by holding down **SHIFT** and clicking anywhere in the anniversary text.


Getting Help

As you've seen, the Organizer is a very powerful application, and so intuitive that you can learn to use much of it with this booklet. Some features may require a little more explanation than you have here. You can find all the details in the Organizer Help system.

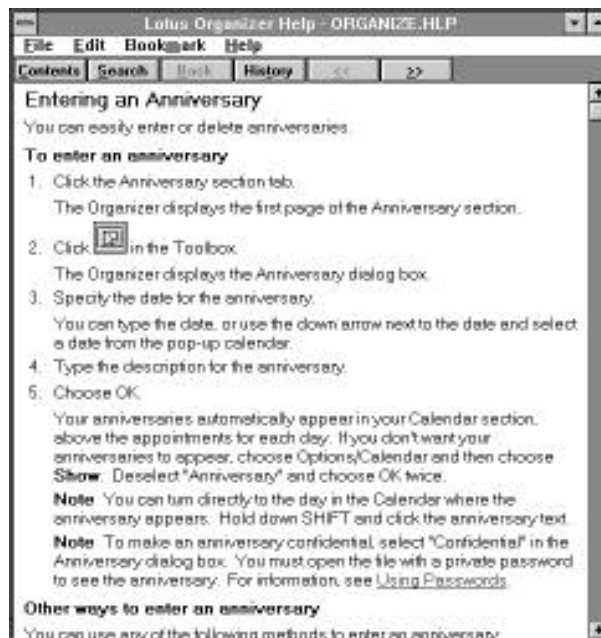
There are four ways to get help:

- Click 
- Press **F1/HELP**.
- Point to an icon and click the right mouse button.
- Choose the Help menu command.

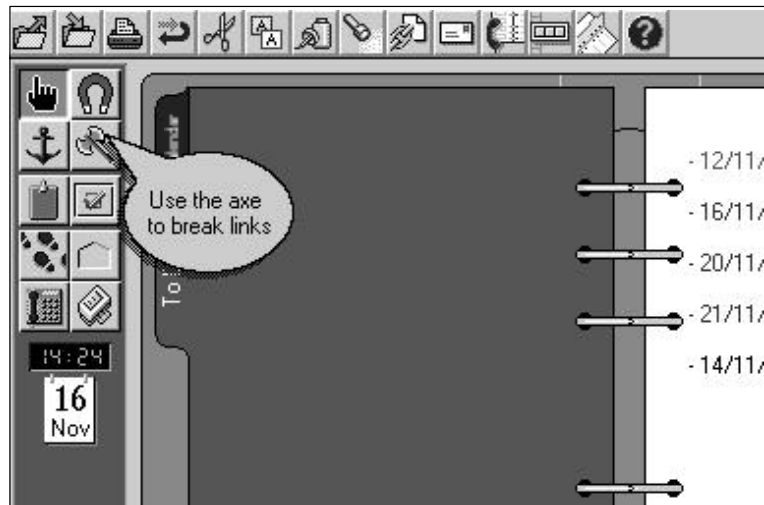
Help with What You're Doing

If you're in the middle of a task and you don't know how to continue, a good place to start is to click  or press **F1/HELP**. This provides context-sensitive help for the task you are performing.

For example, if you are entering an anniversary and you get stuck, press **F1/HELP** and you will see the following Help screen.



If you see something on the screen that you don't understand, you can point to it and click the right mouse button to see an explanation.



Learning More

If you have some time available and you want to learn more about the product by reading some of the documentation, you can browse the help system using the Help menu command. For example, if you want to learn about links, choose Help/How Do I? and then select "Cross-Reference Information in the Organizer."

You can find complete information on each command by choosing Help/Commands from the Help menu.

You can see a list of keyboard and mouse shortcuts by choosing Help/Shortcuts.

You can search for specific information by choosing **Search** on the Help screen.

Further Exploration




This section teaches you how to use a few of the more sophisticated features of the Organizer.


Linking Information

During the course of a day, you work with all kinds of interrelated information. You can use the power of the Organizer to cross-reference, or link, discrete pieces of information. When you use a link, you can turn directly to any page in the Organizer that contains related information.

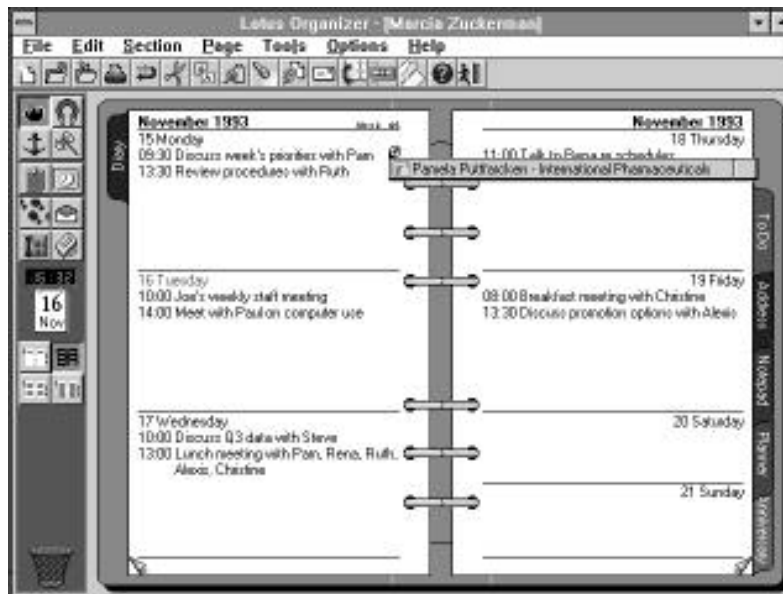
14 Lotus Organizer: An Overview

To see how a link works, enter someone's name and phone number in your Address section, and then enter an appointment with that person in your Diary. Follow the steps below to link the person's phone number to the appointment.

1. Click  in the Toolbox.
2. Move the mouse pointer over the text of the appointment so it changes to an anchor pointer.
3. Click the anchor pointer over the text of the appointment, so it changes to an anchor and chain.
4. Go to the Address section and turn to the person with whom you have the appointment.
5. Click on the entry to complete the link. The  appears in the right corner to indicate the link.
6. When you have finished creating links, click  in the Toolbox to remove the anchor pointer.

To use the information in the link, go back to the appointment and point to the , and hold the mouse button.

If you highlight the name that appears, the Organizer automatically turns to that person in the Address section. You can create multiple links to cross-reference all of your important information.



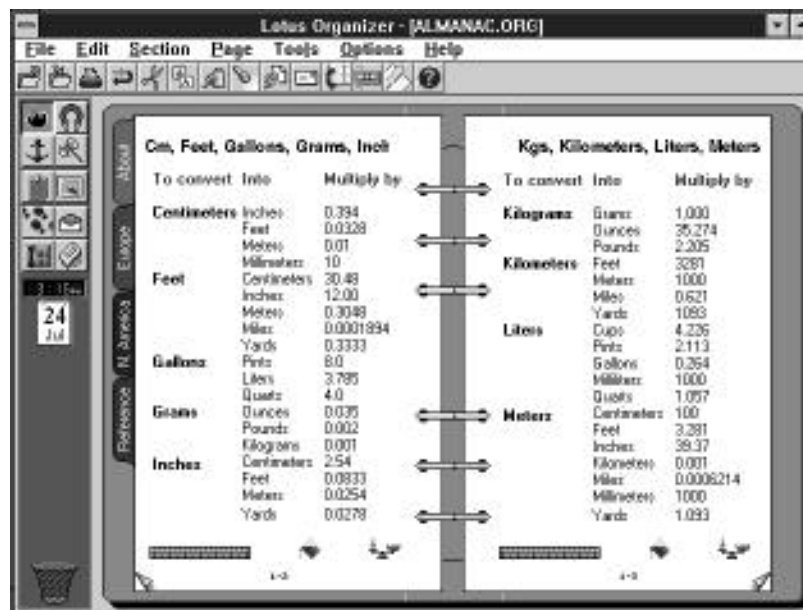
Customising Your Notebook

The Organizer lets you change the appearance and structure of your notebook. You can modify such things as the order of the sections in the notebook, the colour of section tabs, and the section names. You can delete, add, and rename sections.

Suppose you want to add a separate section where you keep only addresses and phone numbers for personal friends.

1. Choose Options/Customise, and choose **Add**.
2. Choose **Address** for **Based on** and give the new section a name (for example, Personal Addresses). Click **OK**.
3. If you want to change the colour for the tab, click the arrow at the bottom of the Customise Organizer dialogue box and choose a new colour.
4. Click **OK** to add the new section.

For example, a creative use of Notepad sections lets you design an almanac.



Moving On

Now that you've experimented with the Organizer and explored on-line Help, you're ready to use the Organizer to transform your paper system into a powerful, on-screen personal information manager and group scheduling tool.