

Lotus Organizer 97 GS Administrator's Guide

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Before you begin

This document is intended for System Administrators who need to install and set up Organizer 97 GS on a network.

What's new in Organizer 97 GS

Organizer 97 GS has both Personal Information Manager (PIM) and Group Scheduling

capabilities. It includes the following PIM enhancements:

- Support for multiple calendar views
- Direct linking and access to Internet sites
- vCalendar and vCard support
- Connectivity with Organizer Web Calendar v1.1

For more information about these PIM features, see "What's New" in *Exploring Organizer*.

The Group Scheduling component of Organizer 97 GS now incorporates Notes 4.51 and higher as its message transport mechanism, which means:

- All calendaring and scheduling information is stored in the user's Notes mail file.
- All address information is stored in the user's local Notes Address book.
- All free time handling, meeting notice exchange, and room reservations are handled by Notes.

For more information about Group Scheduling features, see "Group Scheduling" in *Exploring Organizer*.

Organizer 97 GS upgrade tools

If you are upgrading from Organizer 2.11, Organizer 97 GS includes three tools to assist you with program implementation and administration:

Tool name	What it does
Migration Utility	Converts group scheduling .OR2 files to Organizer 97 GS .NSF files in batch.
cc:Mail MTA Conversion DLLs	Exchanges mail messages and directory information between Organizer 97 GS users and Organizer 2.11/cc:Mail users.
Free-Time Plug-in	Shows Organizer 97 GS users the free time of Organizer 2.11 users, who use either cc:Mail or Notes.

For more information about these tools, see "Migrating users to Organizer 97 GS" and "Installing and running the interoperability tools" below.

Organizer administration changes

Organizer 97 GS administration is simplified because of its exclusive use of Notes as the message transport mechanism. The use of Notes also changes the way you administer, and your end-users work with, Organizer. These changes are as follows:

Utilization of Notes

Since Notes handles all scheduling tasks, you no longer need to manage or maintain separate Organizer agents if you plan to convert all users to Organizer 97 GS.

Improved file security for Organizer data

In Organizer 2.11, users set up their own file security restrictions within the program. Now all file security is handled through Notes Access Control List (ACL) settings. You may need to adjust access rights for users if, for example, you do not permit end-users to make ACL changes to their mail files.

Organizer 97 GS group scheduling users set access control rights to the calendar information in their mail files using the Delegation Profile in Notes. When users make changes in the Delegation Profile, they are actually changing the file's Access Control List (ACL) settings. Therefore, Organizer users must have Manager access to their mail files to be able to see or change the Delegation Profile.

When an Organizer user gives another person the right to *manage* his/her Calendar, the person is assigned "No Access" for private documents and Read and Write access for public documents. In Organizer, this access level means that the person will not be able to read or create confidential entries in the Organizer Calendar, but can read and create non-confidential entries. A user who has the right to *read* another's calendar file is assigned "No Access" for private documents and has Read access for public (non-confidential) entries only.

To view and modify the Delegation Profile for a mail file in Notes:

1. Double-click the mail file icon on the Notes desktop.
2. Choose Actions - Calendar Tools - Calendar Profile.
3. Click "Allow other users to view your calendar."
4. In the Delegation Profile, uncheck "Everyone can read my Calendar."
5. Use "Only the following people/groups can read my Calendar" and "Only the following people/groups can manage my Calendar" to restrict access to the calendar entries in the mail file.
6. Click OK to save your entries in the Delegation Profile.

If a user who is assigned to manage another person's calendar also wants to create filters, add or remove sections, or upgrade another's Organizer file, they need to have "Editor" access to the other person's mail file with the option "Create shared folders/views" checked. Users who want another person to manage their calendar can set this access control themselves, or you can do it for them.

To set access control for Organizer users who will edit another person's calendar:

1. Select the mail file icon of the user whose calendar will be edited by another.
2. Right click the icon and choose Access Control.
3. Select the name of the person who will be managing the calendar data associated with this mail file.
4. Click the "Access" box and choose Editor.
5. Check the "Create shared folders/views" box.
6. Select another name (if necessary) and repeat steps 4 - 5.
7. When finished, click OK.

Users who manage another's calendar also need Editor access (with the ability to create views) if they want to see views that the owner has not previously selected. For example, if an assistant wants to see the View by Status in the To Do section and the owner of the file has not previously used View by Status, the assistant will need Editor access to the mail file to see the tasks sorted this way.

Address information stored in Notes

All entries in the Organizer 97 GS Address section are stored in the Notes user's local Address book. To share Address books, users can make copies of their Address book files and e-mail them to others to use locally, or you may want to set aside space on a file server to contain copies of Address book files.

System requirements

The following lists describe the hardware and software requirements for installing Organizer 97 GS on a network and for installing and running the Migration Utility, the cc:Mail MTA Conversion DLLs, and the Free-Time Plug-in.

Requirements for the Organizer 97 GS program

To run Organizer 97 GS, your system must have:

- 31MB of available hard-disk space for a Server install; 2MB for a Node install
- 27MB of available hard-disk space for a Client install
- 16MB random access memory (RAM) on the server or node machine

- Domino (Notes server, Release 4.51 or higher) installed
- Notes 4.51 or higher 32-bit client installed for each user
- Windows 95 or Windows NT, Release 4.0 or higher

Requirements for the Migration Utility

To run the Migration Utility, your server must have:

- 2MB of free disk space on the Domino server for each 1MB of .OR2 file*
- 2MB of free disk space on the Notes server for the Utility
- 16MB of RAM to run the Migration Utility
- Domino (Notes server, Release 4.51 or higher) installed
- Notes 4.51 or higher 32-bit client install
- Organizer 97 GS client install
- Windows NT, Release 4.0 or higher
- Full access rights to the file server directories containing the .OR2 files
- Editor or higher access to the Notes mail files that will contain the migrated Organizer information

* If the .OR2 file is less than 1MB, the required free disk space on the server is between 1 and 2MB. The space values are estimates and do *not* include the base size requirement for an empty mail file (which is approximately 2MB).

Requirements for the cc:Mail MTA Conversion DLLs

To run the cc:Mail MTA Conversion DLLs, your system must have:

- 3MB of free disk space on the Domino server
- 1MB of RAM to run the Conversion DLLs
- cc:Mail MTA version 1.1 or higher
- Domino (Notes server, Release 4.51 or higher) installed
- Windows NT, Release 4.0 or higher

Requirements for the Free-Time Plug-in

To run the Free-Time Plug-in, your system must have:

- 5MB of free disk space on the Domino server
- 4MB of RAM to run the Free-Time Plug-In
- Domino (Notes server, Release 4.51 or higher) installed
- Windows NT, Release 4.0 or higher

Installing Organizer 97 GS

This section explains the installation procedures for Organizer 97 GS. More information about installing Organizer, including information about international installations, can be found in the READNET.TXT file included with the Organizer program.

Important! If you are upgrading from a previous version of Organizer, do *not* install Organizer 97 GS until you have migrated all users' files. See "Migrating users to Organizer 97 GS" for more information.

There are three types of Organizer installations:

- Server
- Node
- Client

A Server installation places all Organizer 97 GS program files on the server. Users then perform a Node install to copy only those files necessary to run Organizer from their workstations without copying all the files to their hard disks. A Client Install copies the entire Organizer 97 GS program to a single computer.

Before installing Organizer 97 GS, users should have already installed or upgraded to Notes 4.51 or higher (32-bit client version).

Organizer directory structure

By default, Organizer 97 GS creates the following directories and subdirectories during installation:

Directory Tree	Contents
LOTUS\	Lotus root directory
BACKUP\	Lotus backup files directory
ORGANIZE	Organizer backup files
COMPONENT	Lotus shared tools
ORGANIZE\	Organizer program files
EXTRA\	Organizer upgrade tools directory
CONVDLL	cc:Mail MTA Conversion DLLs
MIGRATE	Migration Utility
PLUGIN	Free-Time Plug-in
ICONS	Organizer SmartIcons
LAYOUTS	Report/print layouts
WORK\	Working files directory
ORGANIZE	Organizer PIM database files (.OR4)

Installing a server version of Organizer 97 GS

To create a server install of Organizer 97 GS:

1. Insert the Install disk or the Organizer CD-ROM in the drive.
 2. Click the Windows Start button and choose Run.
 3. Type a:\install in the "Open" box and click OK. If you are installing from a CD, replace a: with the drive letter of your CD-ROM.
 4. Select "File server or multiple user install."
 5. Enter your company name and click Next.
 6. Click Yes to confirm your company name or No to return to the previous screen.
 7. Choose the type of server installation and click Next.
- File Server — Choose this option to install Organizer files on the server in uncompressed format. Use this option if you want users to perform a Node install later. Node install users copy only some files to their hard disk and run Organizer from the network.
 - Network Distribution — Choose this option to copy the Organizer files from the disks or CD to the network. You can then install Organizer to other machines using this network copy.
 8. Click Open to view a text file version of the Network Administrator's Guide. Otherwise click Next to continue.
 9. Select the drive and folder to contain the Organizer program. The default is C:\LOTUS.
 10. Click Next.
 11. Select your install option:
 - Default features — Installs all Organizer components.
 - Customize features — You choose which pieces of Organizer to install.
 12. Select the subdirectory locations for the Organizer program and the Lotus shared tools. The defaults are C:\LOTUS\ORGANIZE and C:\LOTUS\COMPONENT. If you chose the Default features install option, skip to step 15.
 13. Choose which Organizer features to install on the server. If you choose not to install one or more of the features here, the Node install user won't be able to use these files.
 14. Choose the Organizer features you want the end-user to be able to copy locally (to their hard drive). If you don't select any options on this screen, a subsequent Node install will copy only those files needed for the end-user to run Organizer from the network. Click OK.
 15. Select the type of Organizer install — PIM or PIM with Group scheduling. Click Next.
 16. Select a program folder for Organizer (the default is "Lotus SmartSuite"). Click Next.

Installing a node version of Organizer 97 GS

After you install a Server version of Organizer 97 GS, end-users can install Node copies to their local machines.

1. Log in to the network and connect to the file server on which the administrator installed Organizer.
2. Start Windows.
3. Click the Windows Start button and choose Run.
4. Enter the network drive and directory location for Organizer, followed by INSTALL.EXE (for example, M:\LOTUS\ORGANIZE\INSTALL.EXE). Click OK.
5. Enter your name and click Next.
6. Click Yes to confirm the name you just entered.
7. Select the drive and directory to contain the Organizer files and click Next.
8. Select which Organizer files you want to install. (For example, you may want to install the Help system to your local drive for quick access.) Click Next.
9. Follow the remaining instructions on the screen to complete the installation.

Installing a client version of Organizer 97 GS

You need to install a Client version of Organizer 97 GS on the Notes server before running the Migration Utility. After you install this client version, you will have an Organizer 97 GS shortcut icon on the server desktop. Do not attempt to use this icon to run Organizer; it won't work. This client version is used only by the Migration Utility.

1. Insert the Install disk or Organizer CD in the drive.
 2. Click the Windows Start button and choose Run.
 3. Type a:\install in the "Open" box and click OK. If you are installing from a CD, replace a: with the drive letter of your CD-ROM.
 4. Enter your name and company name and click Next.
 5. Install asks you to confirm your name and company:
- Click Yes to accept your entries.
 - Click No to return to the previous screen and enter the names again.
6. Follow the instructions on the screen to complete the installation.

Note If you have a server installation of Organizer 97 GS on the same machine that you are using for this client installation, make sure the location and name for the client version are different than the location for the server version.

Setting up rooms and resources for group scheduling

Organizer 2.11 stored information about rooms and resources (such as equipment) in .OR2 files. Organizer 97 GS uses room and resource information from the Notes Resource Reservation database. If you have not already created this database, it is recommended that you migrate all users to Organizer 97 GS first then create the Notes database.

You must use Notes to create the Notes Resource Reservation (template RESRC45.NTF). You also need to create a corresponding Site Profile document for the database. For more information about creating the database, see Notes Administration Help, Chapter 6, "Setting up and Managing Scheduling."

Migrating users to Organizer 97 GS

This section explains how to migrate group scheduling users from Organizer 2.11 to Organizer 97 GS. You use the Migration Utility to convert Organizer 2.11/Notes mail-based scheduling users to Organizer 97 GS group scheduling format (.NSF).

The Migration Utility checks the Notes public Address book to locate the Organizer users to migrate. For Organizer 2.11 users, Person documents in the public Address book contain a series of Organizer-specific fields. The Migration Utility checks for the existence of these fields and updates their contents after migration. The fields are:

Field Name	Contents
OrganizerCalendarPath	Path to the Organizer file
OrganizerCalendarServer	File server name and volume
OrganizerAgentName	Scheduling agent name (_OrgAgent)
OrganizerEntryType	2=Person
OrganizerFreeTime	2=Organizer 2.11

After you select the users to migrate, the Migration Utility puts data from all sections of the user's Organizer file, except the Address section, into the user's mail file. The Address section data is converted to a temporary, personal Address book (.NSF format) on the server. This file is then automatically e-mailed to the end-user. If the user's .OR2 file had no Address section, they also receive a message to that effect. See Appendix A of this document for the text of these e-mail messages.

Although the Migration Utility can convert the contents of most Organizer 2.11 files, it cannot migrate:

- Multiple address sections
- Links between an Address section and any other section
- File links in the Address section
- Filters for Address sections
- Notepad references to .BMP, .TXT or other files

If the files contains multiple address sections, the Migration Utility rejects that file completely. Check the failure .LOG from the Migration Utility to see which users had files with multiple Address sections. You can then e-mail those users and explain that they can either remove the multiple Address sections or migrate their files individually by choosing File - Import in Organizer 97 GS. For more information about File - Import, see "Migrating files using File - Import" below.

If the file has links, filters, or file references of the type listed above, the Migration Utility drops these items during migration. If a file has only a few of these items, users may prefer to let you run the Migration Utility and then the user can recreate them in the new file. Or, users may want to migrate the file by choosing File - Import in Organizer 97 GS.

Neither the Migration Utility nor the File - Import option can migrate the following items from a user's Organizer .OR2 group scheduling file to Organizer 97 GS format:

Feature	How handled
Meeting notices	Converted to appointments
Meeting chair and attendees	Added as part of appointment description
User Preferences	Lost; must be reset by end-user
Links to records in another Organizer file	Lost; must be reset by end-user

Preparing for migration

There are some tasks that you, the System Administrator, must do before migrating users and other tasks that the end-user should do. Before running the Migration Utility, you must:

- Compact all Organizer 2.11 files to be migrated
- Upgrade to Notes 4.51 or higher, 32-bit version
- Set up all Organizer users as Notes users with mail files
- Back up all users' Notes mail files, Address books, and .OR2 files
- Have Read/Write/Update access to the public Address book(s) on the server used for migration
- Have Read access to the Organizer .OR2 files to be converted
- Turn off all Organizer scheduling agents
- Install a client version of Organizer 97 GS on the Domino server
- Install the Migration Utility on the Domino server

- Make sure there is a 32-bit client version of Notes on the Domino server
- Make sure the server has a temporary directory whose path is defined in the server environment

Organizer 2.11 files can be compacted in batch mode using an Organizer command file (.OAC). See "Using Lotus Organizer Compact 2.1 in Batch Mode" in the Lotus *Organizer 2.11 Administrator's Guide* for more information.

For information about starting and ending Organizer scheduling agents, see Chapter 3: "Installing and Setting Up Organizer" in the Lotus *Organizer Administrator's Guide 2.1*.

Organizer 2.11 end-users should perform the following tasks before migration:

- Note the name of any included sections
- Process unprocessed meeting notices
- Archive old data that does not need to be migrated
- Close their .OR2 files and Notes mail file

Included sections are not migrated and therefore must be re-included after migration is complete. Users may want to archive old Organizer data and save it to a local .OR2 file. This file can then be upgraded to Organizer 97 GS format by choosing File - Import if it is needed.

Installing the Migration Utility

Be sure to install the Migration Utility on a Domino server that includes a client version of both Notes and Organizer 97 GS. After migration is complete, both the Organizer 97 GS client and the Migration Utility can be removed from the server.

To install the Migration Utility on the Domino server:

1. Insert the Migration Install disk or Organizer CD in the drive.
2. Exit the Domino server.
3. Click the Windows Start button and choose Run.
4. Type d:\lotus\organize\migrate\orgmigrt.exe in the "Open" box and click OK. If necessary, replace "d" with the correct letter of the drive that contains the Organizer CD.
5. Enter your name and company name and click Next.
6. Click Yes to confirm your name and company, No to enter the names again.
7. Follow the instructions on the screen to complete the installation.
8. After you have successfully installed the Migration Utility, it is added to the Lotus Accessories folder which is in the Lotus SmartSuite folder.
9. Restart the Domino server.

Running the Migration Utility

Before running the Migration Utility, make sure all Organizer users to be converted are Notes users—they are listed in the public Address book and have a mail file. Also make sure your server ID has full access to the .OR2 files to be migrated.

To start the Migration Utility:

1. Make sure the current Notes ID is that of either a Notes Administrator or the server.
2. Click Start and choose Programs - Lotus SmartSuite - Lotus Accessories - Organizer 97 GS Migration Utility.
3. Enter your Notes Administrator's or server's password in the Password dialog. You see the Migration Utility window, which contains two tabs: Convert Users' Data to NSF and Cleanup Name and Address book entries. The Convert Users' Data to NSF tab contains the following five steps:
 - Prepare to Migrate Organizer 2.11 users to Organizer 97 GS
 - Select Users to Convert to Organizer 97 GS
 - Preliminary Checks
 - Convert Users' Organizer Files

· Result Summary

4. Select the Notes Name & Address Book (NAB) that contains the names of Organizer users to migrate.

You can choose the NAB on the server that contains the Migration Utility or on another server in your system. If you want to convert a file that is not local to your server, click the Browse button to choose a different database and file name.

Note The server containing the Migration Utility must be able to access servers containing the .OR2 files to be converted.

5. Click Next to continue.
 6. Select the users to migrate by clicking their names, or
- Hold down SHIFT and click to select a group of names, or
 - Choose Edit - Select By to select groups of users based on a selection criterion.

Note Click a highlighted name again to remove it from the list.

7. Click Next to continue.
The Migration Utility checks for server errors that would prevent any files from migrating properly, such as improper access rights.
 8. If you have errors, do one of the following:
- Click Previous to change your selection.
 - Select File - Exit to exit the Migration Utility and make any necessary changes.
See "Troubleshooting" below for information about migration errors and possible solutions.
9. When the Migration Utility displays the message "No Errors," click Next to continue with the migration.
 10. Click Migrate.

Depending on the number of users selected, this step may take several hours to complete. During the migration, the utility displays a progress bar with the number of files to convert.

The Migration Utility creates two .LOG files, one that lists successfully migrated files and a second that lists any files that did not migrate and the error that occurred.

To see the Migration LOG files:

1. Click View Log.
2. Select which .LOG file to view: Success or Failure.

The utility opens Notepad and displays the .LOG text file.

If a file doesn't migrate successfully, you can export the .OR2 file, section by section, to a .TXT file. Then choose File - Import and import the .TXT files individually. For information about specific errors and possible solutions, see "Troubleshooting" below.

Cleaning up Address book entries

After you have successfully completed the migration of a group of Organizer 2.11 users to Organizer 97 GS, you use the Migration Utility again to cleanup the Organizer 2.11 entries for the migrated users listed in the public Address Book.

To clean up public Address book entries:

1. Make sure the current Notes ID is that of a Notes Administrator or server.
2. Start the Migration Utility from the Domino server.
3. Enter the password for the Notes ID.
4. Select the Cleanup Name and Address Book tab.

The cleanup steps are similar to the migration itself: You select users for cleanup; the

utility checks for errors; you proceed with the deletion and check the .LOG files for failures.

5. Click Next to continue.
 6. Select the users to cleanup by clicking their names, or
- Hold down SHIFT and click to select a group of names, or
 - Choose Edit - Select By to select groups of users based on a selection criterion.

Note Click a highlighted name again to remove it from the list.

7. Click Next.
The Migration Utility checks for errors that could prevent the cleanup from continuing.
8. If you have errors, do one of the following:
 - Click Previous to change your selection.
 - Choose File - Exit to exit the Migration Utility and make any necessary changes.If you have no errors, click Next to continue with the cleanup.
9. Click Cleanup.

After the entries in the public Address Book are updated, the Utility creates two .LOG files: one that lists successes and the other that lists any failures.

To see the Cleanup LOG files:

1. Click View Log.
2. Select which .LOG file to view: Success or Failure.

The utility opens Notepad and displays the .LOG text file.

Uninstalling the Migration Utility and Organizer 97 GS

After you have migrated all Organizer 2.11 users to Organizer 97 GS, you no longer need the Migration Utility nor the client version of Organizer 97 GS on the Domino server.

To uninstall the Migration Utility:

1. Click Start.
2. Choose Settings - Control Panel.
3. Click Add/Remove Programs.
4. Select the Migration Utility.
5. Click Add/Remove.

To uninstall the client version of Organizer 97 GS, repeat steps 1 - 5 above, choosing Lotus Organizer 97 GS in step 4.

After migrating all users to Organizer 97 GS, you still have one more task: you must delete their old .OR2 files and the Organizer 2.11 agents from your system. See "Deleting .OR2 files and scheduling agents" below for more information.

Migrating files by choosing File - Import

End-users can migrate their .OR2 files themselves by choosing File - Import in Organizer 97 GS. *Before* they install Organizer 97 GS and run File - Import, users should perform the following steps:

1. Start Organizer 2.11.
2. Select File - Open and select the .OR2 file to convert to Organizer 97 GS format.
3. Select File - Meeting Notices.
4. Select "Also receive notices via e-mail" and click OK.
5. Select File - Compact to compact the file.
6. Select File - Save As and save the .OR2 file as a local copy to the hard disk.
7. Quit Organizer 2.11.

8. Start Notes.
9. Select File - Database - New and create a personal Address book (using the PERNAMES.NTF template) on your Local server.
10. Repeat step 9 for any additional Address books to map to Organizer Address sections.
11. Quit Notes.
12. Install Organizer 97 GS and start the program.
13. When prompted, type your Notes password.
14. Choose Section - Include and include new Address sections for each of the Address books created in step 10.

The user is now ready to use the File - Import option to convert Organizer 2.11 data to Organizer 97 GS format:

1. Choose File - Import.
2. Click the "Files of type" box and select Organizer .ORx files.
3. For "File name," select the local .OR2 file to migrate.
4. Click Import.
5. Organizer asks you to map the old Address sections to new ones.
6. For each Address section in the list, select a corresponding Address section in the new file and click Import.

Organizer 97 GS adds the Organizer 2.11 data to the mail file and adds the Address section information to the specified local Address books. If there are sections other than Address sections in the .OR2 file that do not match a section in the .NSF file, Organizer creates them.

After users have migrated their Organizer 2.11 file using File - Import, you must manually cleanup the Organizer fields in the user's Person document in the public Address book. See "Migrating users to Organizer 97 GS," for a list of the fields that need to be removed.

Note If the user has already upgraded to Organizer 97 GS (and no longer has access to Organizer 2.11), they can still migrate their .OR2 file. However, you will have to make sure they have access to their .OR2 file on the file server and supply them with the full path to the file. When choosing File - Import, the end-user must specify the location of the file on the network.

Deleting .OR2 files and scheduling agents

After you have cleaned up the public Address Book entries for the migrated Organizer users, you should delete their .OR2 files. Since Organizer 2.11 scheduling agents are also no longer needed after migration, you should also delete the agents' mail files, Notes ID files, and Person document entries in the Notes public Address book. When all agents are deleted, you can remove the path to the agents from the NOTES.INI file, located in the ServerTasks field. Also remember to replicate the changes you made to the server's Address book to any additional Notes servers.

Installing and running the interoperability tools

Organizer 97 GS includes two tools to help users interoperate during and after migration: the cc:Mail MTA Conversion DLLs and the Free-Time Plug-in. The cc:Mail Conversion DLLs are added to and run on top of the cc:Mail MTA (v 1.1). The Free-Time Plug-in is a Notes Add-in task that runs each time the Notes server loads.

The cc:Mail MTA Conversion DLLs

The cc:Mail Mail Transfer Agent (MTA) v1.1 exchanges messages and directory information between Notes and cc:Mail users. The cc:Mail MTA Conversion DLLs exchange scheduling information between Organizer 97 GS users and cc:Mail users with Organizer 2.11. In Organizer 2.11, cc:Mail users sent a meeting notice as an e-mail with an .ORS attachment listing all invitees and information about the meeting. In Organizer 97 GS, a meeting invitation is sent as a Notes Meeting Notice Form. When users of these different Organizer versions want to exchange meeting notices, the Conversion DLLs translate the format of the meeting notice to the proper format required for the receiving program.

Note Organizer 2.11 users with Notes for mail-based scheduling cannot exchange meeting notices with Organizer 97 GS users.

Setting up the cc:Mail MTA for Organizer

Before installing the Conversion DLLs, you must install the cc:Mail MTA v.1.1 on your Domino server and setup the cc:Mail MTA to propagate and convert Organizer information to the cc:Mail Post Office Server and the Notes public Address book. For more information, see the *cc:Mail MTA Administrator's Guide*.

Note To schedule with groups, do *not* propagate them using the cc:Mail MTA mailing list title propagation feature. Instead, create the same groups in both the public Address book and in the cc:Mail post office.

Installing and setting up the cc:Mail MTA Conversion DLLs

The Conversion DLLs must be installed in the cc:Mail MTA v1.1 program directory (which is usually the same as the Notes program directory). The Conversion DLLs will not work with earlier versions of the MTA.

To install the cc:Mail MTA Conversion DLLs:

1. Do one of the following:
 - Insert the Organizer CD in your CD-ROM drive and go to the LOTUS\ORGANIZE\EXTRA\CONVDLL directory.
 - Go to the Lotus web page: <http://www.lotus.com/notesmta/21de.htm> and locate the ORSCONV.ZIP file.
2. Copy all files from the CONVDLL directory to the cc:Mail MTA program directory, or download the ORSCONV.ZIP file to the cc:Mail MTA program directory. The files contained in the directory (or .ZIP file) are:
 - LTSCSN10.DLL
 - NORSCONV.DLL
 - OR1C30EN.DLL
 - TZISO32.DLL
3. If you downloaded the .ZIP file, use an unzip utility (such as PKUNZIP or WINZIP) to extract the Conversion DLLs.
4. Restart the cc:Mail MTA.

Note: To uninstall the Conversion DLLs, delete the DLL files listed above from the cc:Mail MTA program directory.

Modifying the Organizer 2.11 .INI file

For the Conversion DLLs to work properly, your ORG2NET.INI file must contain the following setting in the [SCHEDULING] section:

```
OrsMailAttachment=1
```

The ORG2NET.INI file is located on the network in the Lotus Organizer program directory. The Lotus Scheduling Agents utilizes this setting to determine whether to attach .ORS files to the e-mail of non-Organizer 2.11 users. When the value of this setting is 1, the .ORS file attachment is included with the e-mail.

After you add this line to your INI file, be sure to restart the Organizer 2.11 scheduling agents for this setting to take effect.

The Free-Time Plug-in

The Free-Time Plug-in is a Notes 4.51 or higher add-in task that enables Organizer 97 GS users to see the free time of Organizer 2.11 users. The Free-Time Plug-in works for Organizer 2.11 users with either cc:Mail or Notes.

After installing the Free-Time Plug-in, you also need to create a Foreign Domain document for the Free-Time Plug-in in the Notes public Address book. You create this document to tell Notes the domain and server location of the Free-Time Plug-in. For every Organizer 2.11/Notes user, you must also modify the CalendarDomain field of their Person document in the public Address book. Set the CalendarDomain field to the domain name assigned to the Free-Time Plug-in. This section includes a Notes LotusScript to facilitate the modification of this field.

Note Make sure that the Plug-in has Read access to the file servers containing the .OR2 files.

Installing the Free-Time Plug-in

1. Do one of the following:
 - Insert the Organizer CD in your CD-ROM drive and go to the LOTUS\ORGANIZE\EXTRA\PLUGIN directory.
 - Go to the Lotus Organizer home page: <http://www.lotus.com/organizer> and locate the PLUGIN.ZIP file.
2. Copy all files in the PLUGIN directory to the Notes program directory, or download the PLUGIN.ZIP file to the Notes program directory. The files contained in the directory (or .ZIP file) are:
 - LTASBN14.DLL
 - LTASWN14.DLL
 - LTSCSN10.DLL
 - LTSCSN10.TLB
 - MSVCRT40.DLL
 - NORG21BT.EXE
 - OR1C30EN.DLL
 - TZBACK32.DLL
 - TZISO32.DLL
 - TZNET32.DLL
3. If you downloaded the .ZIP file, use an unzip utility (such as PKUNZIP or WINZIP) to extract the Plug-in files.

Note: To uninstall the Free-Time Plug-in, delete the files listed above from the Notes program directory.

Creating a foreign domain document

For the Free-Time Plug-in to work properly, you need to create a foreign domain document for it in the Notes public Address book that contains Organizer users.

To create a foreign domain document:

1. Click the Name & Address book icon on the Notes workspace that contains Organizer users.
2. Select Create - Server - Domain.
3. Under "Foreign domain name," type a Domain name other than your Notes Domain.
4. Under "Calendar server name," type the name of the server that contains the plug-in.
5. Under "Calendar system," select Organizer 2.x from the keyword list.
6. Save and close this document.

Modifying the CalendarDomain field

To make the free-time of Organizer 2.11 users available to Organizer 97 GS users, you need to modify the Organizer 2.11 user's Person document as follows:

1. Open the Organizer 2.11 user's Person document in the public Address book.
2. Scroll down to the Misc heading.
3. Under "CalendarDomain," type the domain name assigned to the Free-Time Plug-in.
4. Close and save the document.

If you have many Organizer 2.11 users, you may want to perform steps 1 - 4 above using a LotusScript agent.

To set up an agent to modify the CalendarDomain field:

1. Open the public Address book that contains entries for Organizer 2.11 users.
2. Choose Create - Agent.
3. For "Name," type `Populate CalendarDomain Field`.
4. Under "When should this agent run," select `Manually From Agent List`.
5. Under "Which document(s) should it act on," select `All documents in database`.
6. Under "What should this agent do," click `Formula` and type the following script:

```
SELECT Form="Person" & @IsAvailable(OrganizerAgentName);  
FIELD CalendarDomain := "Insert Name Here";
```

7. Replace "Insert Name Here" with the domain name of the Free-Time Plug-in.
8. Save and Close the agent document.
9. Select the Agents view and click the agent's entry to run it.

As Organizer 2.11 users are migrated to Organizer 97 GS, remember to return to their Person documents and remove this entry from their CalendarDomain field.

Running the Free-Time Plug-in

To run the Free-Time Plug-in, restart the Domino server and then type the following command at the server console:

```
load org21bt
```

You may also want to include this add-in task to the Notes startup. To run an add-in task automatically, you either create a Program document in the public Address book and specify `NORG21BT.EXE` as the program name or add this name to the `ServerTasks` or `ServerTasksAt` setting in the `NOTES.INI` file. See the *Notes Administrator's Guide* for more information about running server programs automatically.

Working with the interoperability tools

There are some inevitable differences that cc:Mail users will notice when they begin exchanging meeting notices with Organizer 97 GS users. These differences are described in this section.

Booking Rooms and Resources

Organizer 2.11/cc:Mail users can book rooms only from existing Organizer 2.11 .OR2 database files—they do not have access to the new Notes Resource Reservation database. When an Organizer 2.11/cc:Mail chair books the room, the Organizer 97 GS users will see the room as an attendee to the meeting. Organizer 97 GS attendees will therefore need to check the list of attendees for the room location of the meeting.

On the other hand, Organizer 97 GS users can book rooms and resources that are in either Organizer 2.11 database files or the Notes Resource Reservation database. However, for an Organizer 97 GS chair to book a room from an .OR2 database file, they must add it as an attendee to the meeting. Organizer 97 GS users see it as an attendee while Organizer 2.11/cc:Mail users see it as a room. For this reason, the Organizer 97 GS chair should assign Required attendee status to the room and use free-time checking to make sure the room is not already booked for that time slot.

If an Organizer 97 GS user books a room from the Notes database, an Organizer 2.11/cc:Mail user sees the room as an attendee. Organizer 2.11/cc:Mail users should check the list of attendees for the room location of these meetings.

Here's a chart showing the relationship of room location to what each user sees:

<u>Room from</u>	<u>Organizer 2.11 user sees</u>	<u>Organizer 97 GS user sees</u>
.OR2 file	Room	Attendee
Resource Reservation database	Attendee	Room

Note Organizer 97 GS users cannot exchange meeting notices with Organizer 2.11/Notes users. In this case, they must arrange meetings through e-mail until all users have been migrated to Organizer 97 GS.

Tracking the status of cc:Mail meeting attendees

By default, the Conversion DLLs add an additional attendee to a meeting chaired by an Organizer 97 GS user. The Conversion DLLs use this "tracking" attendee to keep track of replies by cc:Mail attendees that are sent to the chair. After cc:Mail users accept a meeting invitation and send a reply, they will see the tracking attendee at the end of their invitee list, but they cannot delete it.

Note The tracking attendee name begins with the characters **z:** followed by a long string of mixed letters and numbers.

If cc:Mail attendees respond to a meeting that they add to their calendar and the administrator has not enabled the tracking attendee, the Organizer 97 GS chair will not be able to see those responses properly. For example, a Notes chair sends a meeting notice to a cc:Mail user. The cc:Mail user accepts the meeting invitation, but then later has to propose a reschedule. Without the tracking attendee, the cc:Mail user's responses won't be listed as a response in the chair's meeting view—the Notes chair wouldn't necessarily know which meeting the cc:Mail user wanted to reschedule.

To remove the tracking attendee from email messages, add the following entry in the NOTES.INI file on the Notes server running the cc:Mail MTA:

```
ccmta_orgattendee=0
```

Restart the cc:Mail MTA program for this setting to take effect. This change affects all scheduling messages across the MTA; that is, it is not possible to disable this feature for selected users.

Rescheduling meetings in a repeat set

Notes uses a different calendaring and scheduling process for repeating meetings than Organizer 2.11. As a result, cc:Mail users will not be able to use Organizer 2.11 to propose a reschedule time for a meeting within a repeating set (for example, suggesting a reschedule for the third meeting that occurs every Tuesday at 10am). Instead, they should propose the reschedule in an e-mail to the chair rather than rescheduling the meeting directly in Organizer 2.11.

Receiving Interoperability Notes log messages

The Conversion DLLs and the Free-Time Plug-in send processing and error messages to the Notes log. Check this log for messages and to ensure that these tools are running.

Troubleshooting

This section outlines problems that may occur during migration or interoperation with Organizer 2.11 users and how to solve them.

General Usage issues

Organizer users experience delays when trying to query free time remotely.

Possible cause and solution:

To query free time, Organizer 97 GS must interact with several Notes databases. Depending on your specific network configuration, Organizer users who work remotely may experience delays when trying to find a free time for a meeting. If users notice these delays, they should not attempt to check the availability of invitees remotely.

Organizer users can't update their To Do items.

Possible cause and solution:

They don't have the Update Tasks agent turned on for their Notes mail file. To turn on the Agent, the user must have access to run agents on the mail server. In the Agents view for their mail file in Notes, click the Update Tasks checkbox to turn on that Agent. If Notes asks which server to use for this agent, specify the user's mail server. Users may also want to change the time that Notes runs the agent each day (the default is 1:00 AM).

Organizer users see duplicate tabs for each section in their new Organizer file.

Possible cause and solution:

The user has updated separately both the server version of their mail file and a replica with Organizer information. When they replicated changes between the two versions of their file, they generated duplicates. To avoid duplicate sets of tabs for each Organizer section, the user should upgrade either the replica version or the server version of your mail file (not both), and then replicate the changes.

To remove the extra set of tabs, the user needs to perform the following steps:

1. In Notes, open the mail file.
2. Change to the "All documents" view.
3. Delete all of the "Do not delete Organizer note - Organizer Database SetupComplete" documents.
4. Start Organizer 97 GS and open the server version of the mail file.
5. When prompted, click Yes to configure the file for Organizer 97 GS.
6. Replicate the changes to any local replicas.

This configures the replicas with one set of tabs for each section.

Migration issues

The Migration Utility doesn't run.

Possible causes and solutions:

- You need to install and run the Migration Utility on a Domino server. The Migration Utility will not run from a file server. Re-install it on a Domino server.
- You also need to install a client version of Organizer 97 GS on the Domino server where you have installed the Migration Utility. The Migration Utility uses Organizer for some tasks. Install a client version of Organizer 97 GS on the Domino server.
- The server's environment doesn't contain a path to a temporary directory. The Migration Utility must have a temporary location for storing files during migration. Create a temporary directory on your server and add that location to the server's path.

The Migration Utility doesn't show a list of users to migrate.

Possible causes and solutions:

- You have selected the wrong public Address book. Go back to the first step in the Migration Utility and click the Browse button to choose a different Name & Address book.
- The server you are using doesn't have access to the Name & Address book you chose. You must install the Migration Utility on a server that has access to the file servers that contain the .OR2 files to convert.
- The users do not have .OR2 files on the network. You may have already migrated all the users in the public Address book you selected.

Migration fails to migrate a user's file.

Possible causes and solutions:

- The user's file could contain multiple Address sections. To use the Migration Utility, the extra section must be removed. Otherwise, the user will have to save a local copy of the .OR2 file and migrate the file by choosing File - Import in Organizer 97 GS. This option maps multiple Address sections to local Name & Address books. The user should create the local Address books first and then migrate the file.
- One or more sections in the file could be corrupted. Make sure the user has compacted the file and archived any old data before attempting to migrate again. If the file still fails, have the user export each section in the file to a .TXT file and then import the files by choosing File - Import in Organizer.

The mail file contains duplicate calendar entries as a result of migration.

Possible cause and solution:

The .OR2 file was migrated to the user's mail file more than once. This could happen if the migration failed after performing a partial migration of the file. If you attempt to migrate the file again, you could end up with duplicate entries in the user's mail file. In this case, you can restore the user's mail file from a backup if you can be confident that they did not receive any new mail. Then run the migration again.

Migration fails and displays an "out of virtual memory" error message.

Possible cause and solution:

The combined size of the .OR2 file and the temporary files that the Migration Utility created for this file was more than could be held in memory. To find out which .OR2 files were successfully migrated, restart the Migration Utility and select the Cleanup Name and Address Book tab. You will see the names of users whose .OR2 files were successfully migrated. You do not need to migrate these users again.

Migration fails and displays an "out of disk space" error message.

Possible cause and solution:

The resulting mail files were larger than the disk space available on the server. Increase the server hard-disk space or reallocate some users to another server.

Choosing File - Import requires a password for the file. Entering one displays an "incorrect password" error message.

Possible cause and solution:

The password you entered does not have owner access to the file. Try again with a password that has the proper access.

Interoperability issues

cc:Mail users aren't getting their meeting notice attachments converted properly by the Conversion DLLs.

Possible causes and solutions:

- The ORG2NET.INI file does not include the ORSMailAttachment=1 setting. Open this file and add this setting under the [SCHEDULING] section.
- The Conversion DLLs are not loaded. The cc:Mail MTA needs to be restarted after you install the Conversion DLLs. To ensure that the Conversion DLLs are running, check your Notes Log for messages from the Conversion DLLs. The Conversion DLLs log a message for each meeting processed.
- The Organizer 2.11 user has not been set up properly in the public Address book. Verify that all fields are set properly, including the Organizer AgentName field.

cc:Mail user responses to meetings don't get back to the chair.

Possible causes and solutions:

- The meeting invitation has a time stamp that is later than the response to the meeting. In this case, the system times between servers need to be synchronized. Since Notes uses the system time to determine when to replicate the databases, if one server is significantly different from another (for example, if one was changed for Daylight Savings Time and another server wasn't), the responses to meetings may not be processed correctly.

- You have turned off the tracking attendee using a setting in the NOTES.INI file. The Conversion DLLs use a tracking attendee to ensure that the Organizer 97 GS chair sees the proper response hierarchy for meetings that were accepted and then had a reply from cc:Mail attendees. To turn the tracking attendee back on, remove the following line from the NOTES.INI file:

```
ccmta_orgattendee=0
```

Free time is not shown (greyed) for an Organizer 2.11 user.

Possible causes and solutions:

- The Plug-in is not running. Enter the Notes server command:

```
Show Tasks
```

at the server console to ensure the Plug-in is running. If not, start the Plug-in by typing:

```
load org21bt
```

- The Calendar domain field is not set or the Calendar Domain record is not properly set up. See "Modifying the CalendarDomain field" above for more information.
- The server containing .OR2 files is not accessible by the server where the Plug-in is installed. Make sure the server has read access to the .OR2 files.
- The Organizer 2.11 user has not enabled free-time access (by default, free-time access is enabled). The user should turn free-time access on.

Appendix A: Migration Utility automatic e-mail messages

When you migrate users' Organizer (.OR2) files to Organizer 97 GS format, the Migration Utility automatically sends an e-mail to each user with the converted Address section attached. The text of the e-mail sent to the end-user is as follows:

```
SUBJECT: Your Organizer 2.11 Address Section
```

```
The file attached to this e-mail, called OR2ADDR.NSF, contains the addresses from your old Organizer (.OR2) file. Your Address section was converted to a personal Name & Address Book.
```

```
To use this file in Organizer and Notes
```

1. Detach the file to your LOTUS\nOTES\DATA directory (or to the directory that contains your personal Name & Address Book).
2. Do one of the following activities:

- Open Organizer and include the file as an Address section.
- Merge the file with an existing local Name & Address Book. (Open the file in Notes 4.5 and copy and paste all entries to the existing Name & Address Book.) Then open Organizer and include this merged Book as an Address section.

```
If you want Notes to use your Organizer Address section for e-mail name lookups, start Notes and choose File - Tools - User Preferences. Select the Mail option and in the Local address books field, add the .NSF name that contains the Address section entries.
```

```
If you merge the Organizer entries with an existing personal Name & Address Book, you may find two entries for one name. Before removing 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 products.
```

If the user had an empty Address section in the .OR2 file, the Migration Utility sends them the following message:

```
Subject: Your Organizer 2.11 Address Section
```

The Address section in your original .OR2 file was empty. No Address information has been sent to you. If you see an Address section when you open Organizer 97 GS, the Address information comes from the Notes local Address book (usually called NAMES.NSF).