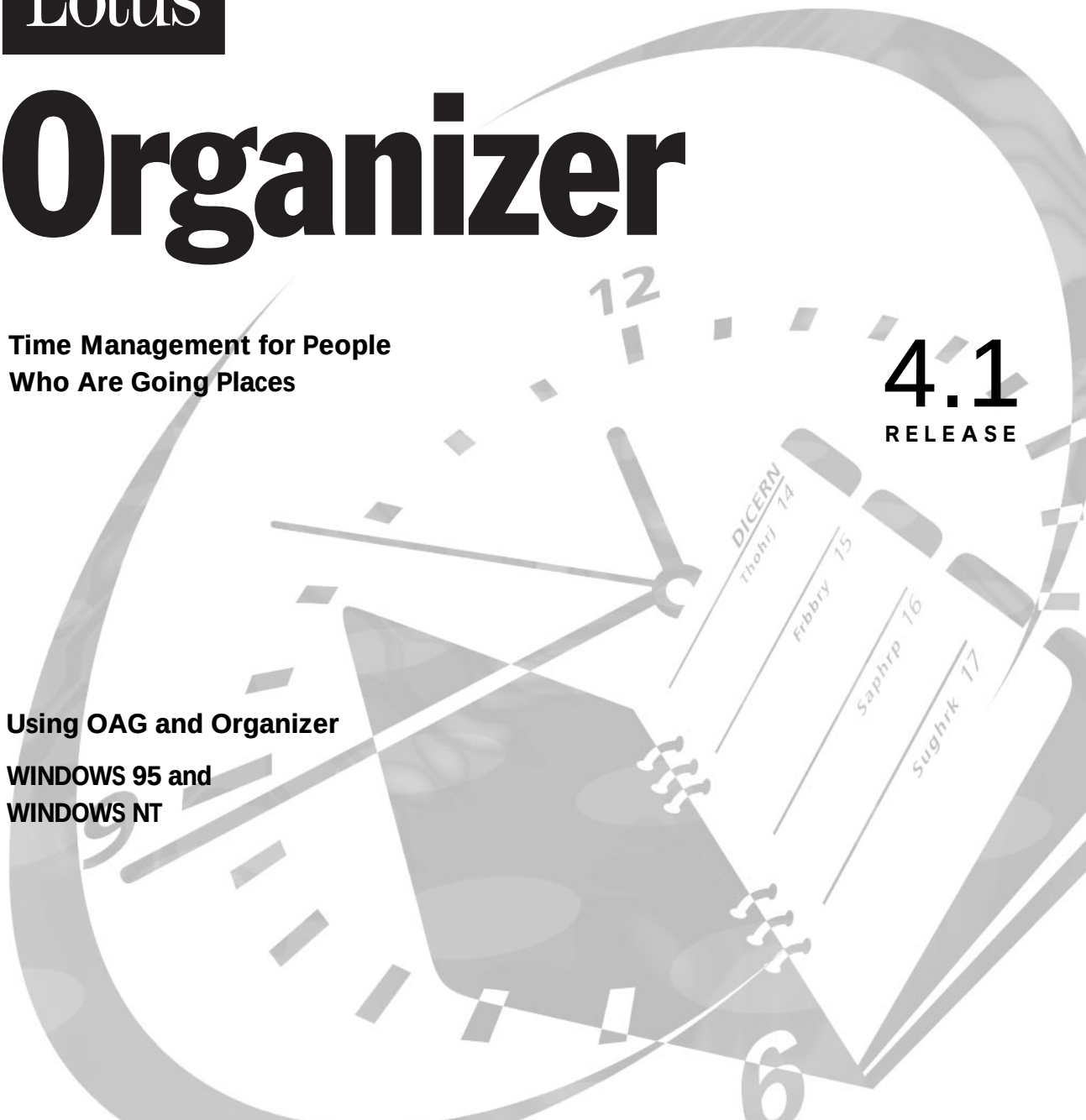
Lotus

Organizer

Time Management for People Who Are Going Places

4.1
RELEASE



Using OAG and Organizer

WINDOWS 95 and WINDOWS NT

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Using OAG and Organizer

Welcome to Using OAG® and Organizer™. OAG, the most popular travel planning information system in the world, is the primary source for all flight schedules and fare information for the Federal Aviation Administration (FAA) and all computerized reservation systems. You can select a flight and rental car using OAG FlightDisk® and make hotel choices using OAG HotelDisk™. Once you've selected your flight and made your hotel choices, you can then send some or all of your trip information to your Lotus Organizer® PIM-only (.OR4) or Organizer with group scheduling (.NSF) file.

You can create:

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

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

Installing OAG

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

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

1. Insert the Lotus Organizer 4.1 Premium Edition CD in your CD-ROM drive.
2. Click the Windows Start button and choose Run.
3. Type **D:\install** in the "Open" box and click OK.

   Note If your computer's CD-ROM drive doesn't use the letter "D," substitute the letter of that drive.
4. Enter your name and company name, and click Next in the Welcome to the Lotus Organizer Install Program screen.

   Note The name you enter is recorded as the registered user for the software.
5. Install asks you to confirm that the names you entered are correct.
   - Click Yes to confirm the names and display the next screen.
   - Click No to return to the previous screen and enter the names again.
6. Follow the instructions that appear on the screen.

   Once Install is complete, the Organizer Extras dialog box appears.
7. In the Organizer Extras dialog box, select "Official Airline Guide."
8. Click Install and follow the instructions that appear on the screen.
9. Click Done to close the Organizer Extras dialog box.

   Note If you install Organizer from a network node or from a file server, the Organizer Extras dialog box is unavailable. You can install OAG from the Lotus Organizer 4.1 Premium Edition CD after you finish the node or file server install. To install OAG, insert the Lotus Organizer 4.1 Premium Edition CD in your CD-ROM drive. Click the Windows Start button, choose Run, and type **D\:Extras\Org41\OAG\Setup.exe**. Follow the instructions that appear on the screen.

Sending OAG Trip Information to Organizer

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

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

Creating Organizer entries with OAG trip information

1. In Organizer, click the OAG SmartIcon.

   OAG FlightDisk opens.

2. Create a trip plan in OAG.

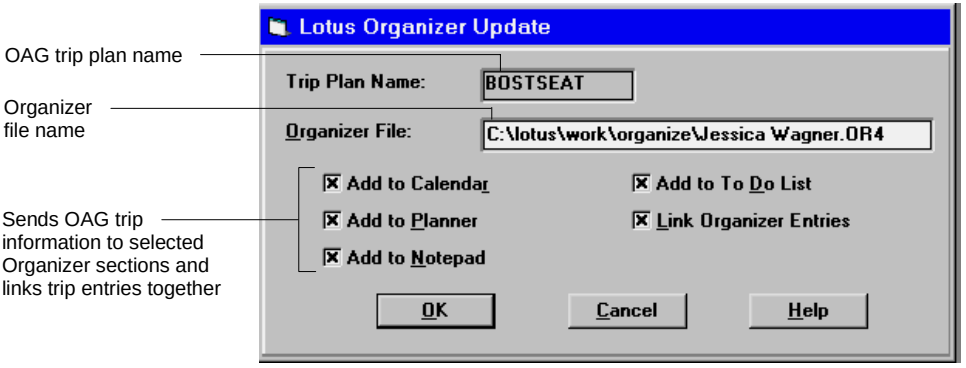
   Note Your OAG trip plan can contain segments for your flights, car rental, and hotel reservations. For more information on creating a trip plan in OAG, see OAG Help.

3. Name and save your trip plan in OAG.

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

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

   The Lotus Organizer Update dialog box appears.



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

   If you're using an Organizer PIM-only (.OR4) file, the most recently used file appears in the "Organizer File" box. To select a different file, highlight the file name in the "Organizer File" box and press **DEL**. Press **ENTER**. In the "Organizer File Open" dialog box, search for the Organizer file you want to open.

   If you're using an Organizer with group scheduling (.NSF) file, the user name of the Organizer file appears in the "Organizer File" box.

5. Click OK.

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

   If you're using an Organizer PIM-only (.OR4) file, enter the password that corresponds to your level of access for that file. There are three levels of access to an Organizer PIM-only (.OR4) file: Owner, Assistant, and Reader. If you're using an Organizer group scheduling (.NSF) file, enter the password for that Organizer file.

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

Option	*Result*
Add to Calendar	Creates Calendar appointment with trip information in the Organizer file
Add to Planner	Creates Planner event with trip information in the Organizer file
Add to Notepad	Creates Notepad page with trip information in the Organizer file
Add to To Do List	Creates To Do task with trip information in the Organizer file4
Link Organizer Entries	Links together all Organizer entries associated with the trip plan

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

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

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

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

   For more information on linking your trip plan's corresponding Organizer entries to one another, see "Linking your Organizer trip plan entries," below.

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

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

Looking at your OAG trip information in Organizer

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

Sending OAG trip information to an Organizer PIM-only (.OR4) file and an Organizer with group scheduling (.NSF) file

Your OAG trip information appears differently depending on whether you send it to an Organizer PIM-only (.OR4) file or to an Organizer with group scheduling (.NSF) file.

Sending OAG trip information to an Organizer PIM-only (.OR4) file

When you send your trip information to an Organizer PIM-only (.OR4) file:

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

If you're using a pre-existing Organizer PIM-only (.OR4) file, you *won't* see the "Travel" Planner key or the "OAG Itinerary" Notepad section. However, you can rename the "Unused5" Planner key to "Travel" in your existing Organizer PIM-only (.OR4) file. Similarly, you can rename an existing Notepad section, or create a new Notepad section, called "OAG Itinerary" in your pre-existing Organizer PIM-only (.OR4) file. OAG trip information you send to the Notepad section will appear in this renamed or newly created section. You can also create a new Organizer PIM-only (.OR4) file and import information from your existing Organizer file to this new file.

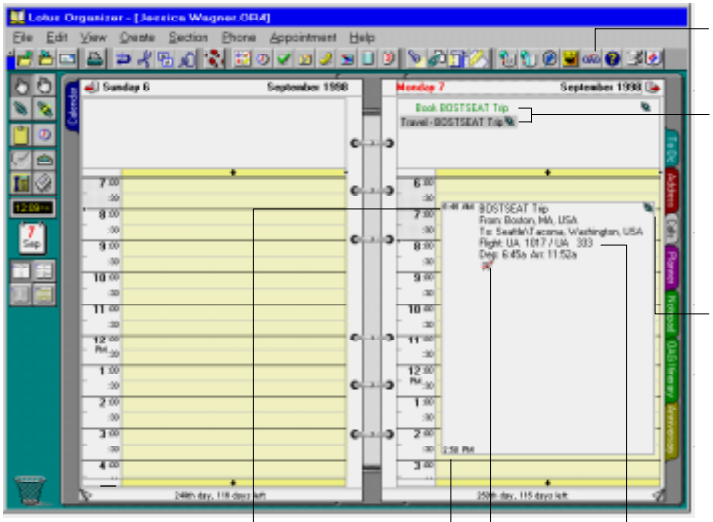
Sending OAG trip information to an Organizer with group scheduling (.NSF) file

When you send your trip information to an Organizer with group scheduling (.NSF) file:

- All Planner events you create when you select “Add to Planner” in the Lotus Organizer Update dialog box in OAG are assigned to the “Unused5” Planner key. (You can change the name of the “Unused5” Planner key to “Travel” if you want.)
- All Notepad pages you create when you select “Add to Notepad” in the Lotus Organizer Update dialog box in OAG appear in the existing Notepad section. You can create a new Notepad section called “OAG Itinerary”; OAG trip information you send to Notepad will appear in this newly created Notepad section.

Seeing OAG trip information in Organizer Calendar appointments

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

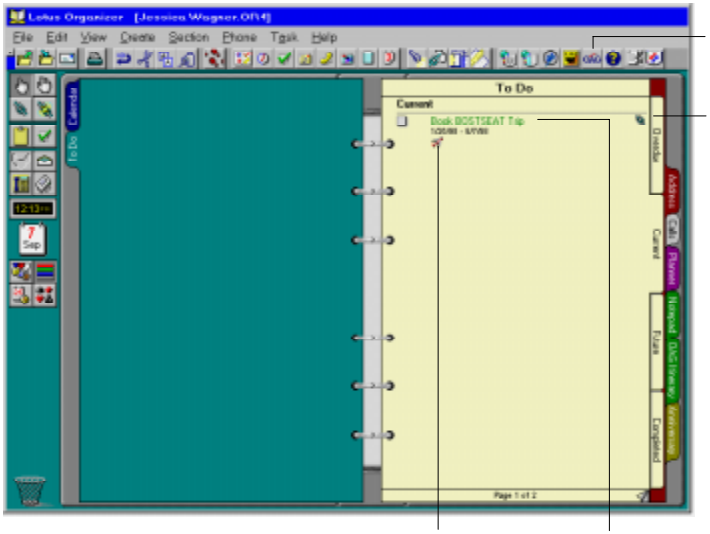


Note If the city you're traveling to is in a different time zone than the city you're traveling from, departure and arrival times are shown in two different ways in your Calendar appointment. In the example on the previous page, the upper and lower left corners of the appointment show both departure and arrival times for Boston (EST). Additionally, in the appointment information area, the departure time shows Boston's 6:45 AM (EST) departure time, and the arrival time shows Seattle's 11:52 AM (PST).

Seeing OAG trip information in Organizer To Do tasks

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

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

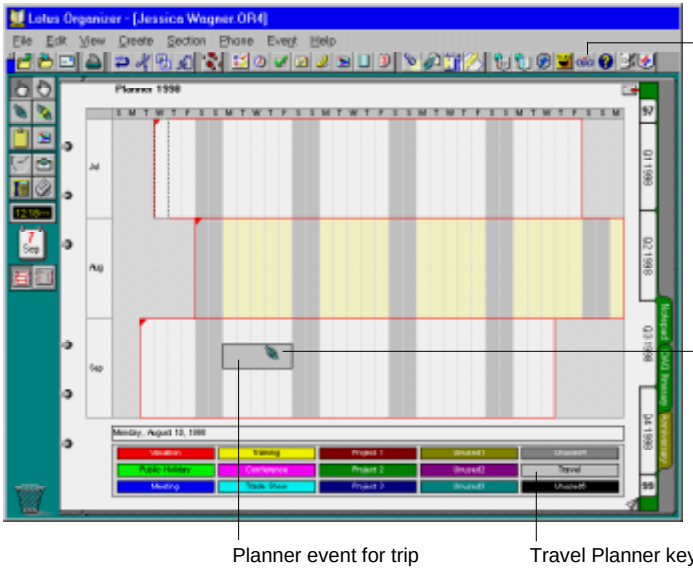


Seeing OAG trip information in Organizer Planner events

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

If you're using an Organizer PIM-only (.OR4) file, the "Unused5" Planner key is renamed to "Travel" when you install OAG. If you're using a pre-existing Organizer PIM-only (.OR4) file, though, you *won't* see the "Travel" Planner key. However, you can rename the "Unused5" Planner key to "Travel" in your pre-existing Organizer PIM-only (.OR4) file. All of your OAG trip plan's corresponding Planner events are automatically assigned to the "Travel" Planner key.

If you're using an Organizer with group scheduling (.NSF) file, the "Unused5" Planner key name isn't changed. All of your OAG trip plan's corresponding Planner events are automatically assigned to the "Unused5" Planner key.

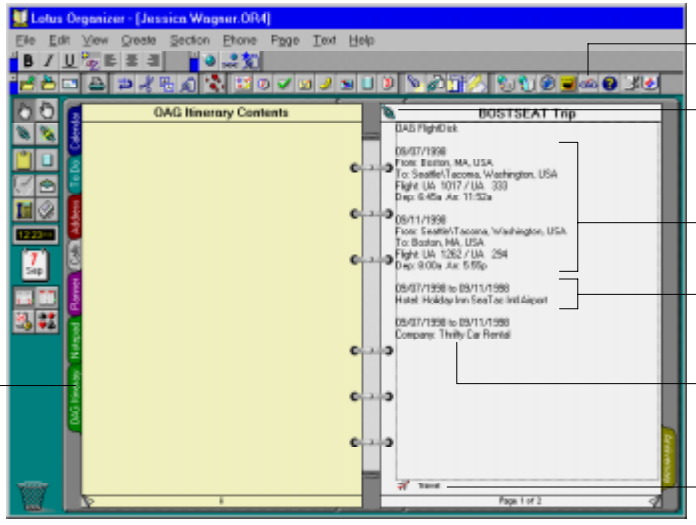


Tip You can assign a different Event type to the Planner event (that is, from "Travel" to "Vacation," for example), as well as change the start and end times for the Planner event. Changes you make to the trip information in Organizer don't affect the trip information in OAG.

Seeing OAG trip information in Organizer Notepad pages

If you're using an Organizer PIM-only (.OR4) file, a new Notepad section called "OAG Itinerary" is created when you install OAG. If you're using a pre-existing Organizer PIM-only (.OR4) file, you *won't* see the "OAG Itinerary" Notepad section. However, you can rename your Notepad section to "OAG Itinerary" in your existing Organizer PIM-only (.OR4) file. If you're using an Organizer with group scheduling (.NSF) file, your trip information is sent to the Organizer file's existing Notepad section.

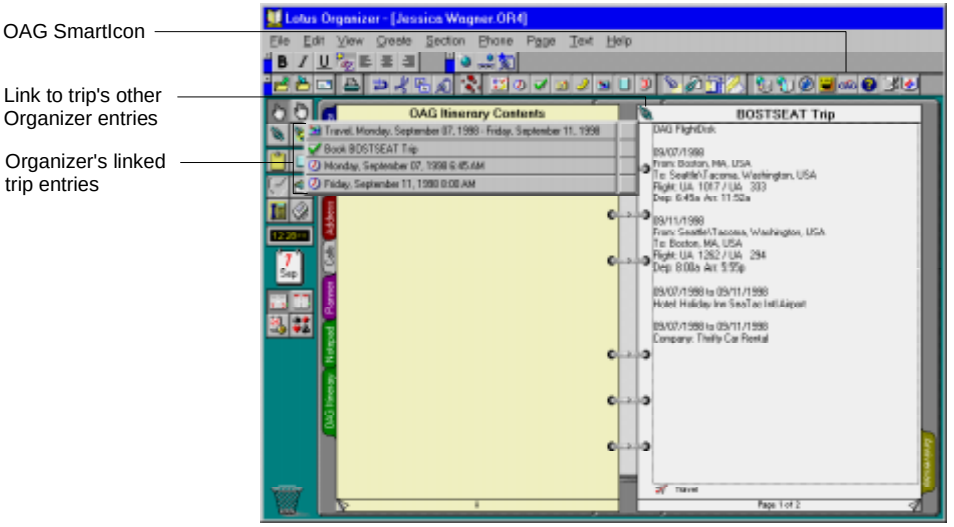
When you send your OAG trip information to the Organizer Notepad section, it creates a Notepad page in "OAG Itinerary" (if you're using an Organizer PIM-only (.OR4) file) or your existing Notepad section (if you're using an Organizer with group scheduling (.NSF) file) with information from your trip plan's segments (that is, the flight, car rental, and hotel segments).



Linking your Organizer trip plan entries

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

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



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