

Lotus Organizer 4.1

README.WRI

Welcome to Lotus Organizer 4.1, the award-winning personal information manager (PIM). These release notes contain important information that isn't included in the printed or online Help documentation.

This file contains information on the following topics:

- What's New in Organizer 4.1
- What's Improved in Organizer 4.1
- Features First Introduced in Organizer 97 GS
- Improvements First Seen in Organizer 97 GS
- Extra Features on the CD and/or the Web
- General Installation
- Multilingual Installations
- Installation for SmartSuite Users
- Miscellaneous Information about Organizer
- Known Problems

For information about upgrading Organizer 97 files to Notes mail files, see *Administrator's Guide*.

Note Lotus Organizer 4.1 was shipped prior to the availability of either Microsoft Windows 98 or NT 5.0. Therefore, Organizer hasn't been tested or certified as compatible with either of these operating systems. Lotus plans to test and certify future releases of Organizer with these operating systems. Please contact Lotus Customer Service at 800-343-5414 or watch the Lotus Web site at www.lotus.com for more details.

What's New for Organizer 4.1

Organizer 4.1 offers enhancements to its personal information management (PIM) features. This release includes all of the features available in Organizer 97 GS, plus the following enhancements:

- A SmartIcon that lets you launch the OAG Travel Information System, where you can get information on flights, hotels, and car rentals. The trip information is then added to your Organizer file for easy reference.
- Corex CardScan, which allows you to scan business cards into a CardScan database using popular scanners. You can then move those records into your Address section in your Organizer file. (**Note:** Corex CardScan is available only with the Organizer standalone version; it is *not* available with Organizer for SmartSuite.)
- Two new Zip2 icons now appear in your set of SmartIcons. These icons offer a direct connection to Web pages for Zip2 Maps and Directions and Zip2 Yellow Pages. You can use these to map trips, get directions, and look for online addresses.
- EasyClip, a new tool that lets you gather information from another program (such as e-mail) to quickly create an Organizer appointment, task, address, or Notepad page.
- EasySync for 3Com PalmPilot and Data Synchronization for Texas Instruments Personal Digital Assistants (PDAs), tools that let you synchronize information back and forth between Lotus Organizer and your PalmPilot or Texas Instruments organizer.

Note All PIM enhancements for Organizer 4.1 are available in both PIM-only and PIM with group scheduling, with the exception of support for the Texas Instruments organizer PDA. You must install Organizer 4.1 PIM-only if you want to set up support for the Texas Instruments organizer PDA.

What's Improved in Organizer 4.1

Organizer 4.1 includes the following improvements.

PIM-only

- Recognizes file names with a space (such as Rozanna Pass.OR4) when compacting a file
- Choosing File - Open opens the c:\lotus\work\organize directory, where your Organizer files are stored
- Opens other mail programs when you click the Send Mail SmartIcon from the toolbar
- Starts Data Synchronization for Texas Instruments PDA when you start Organizer for the first time

PIM with group scheduling

- Address records and tabs appear after applying a filter to addresses (GS)
- Choosing File - Open shows the correct Address Book when you select "Organizer N&A Book" from "Address Book"
- Can be installed and used with a Server/Node installation of Lotus Notes

Note Neither Organizer 4.1 nor any previous version of Organizer 97 GS supports the Notes and Domino clustering/failover functionality for accessing your Organizer data on a back-up Domino server. Lotus is investigating this functionality for a future version of Organizer.

PIM-only and PIM with group scheduling

- Uses the same date for both the Start and Due dates when you create a To Do task
- Opens mail files correctly when a conflicting entry was created in an included section before replication

Features First Introduced in Organizer 97 GS

Organizer 97 GS introduced two sets of features -- PIM-only and PIM with group scheduling. You must choose which feature set you want to use during installation. All of these features are now available in Organizer 4.1. What follows are the enhancements each choice gives you:

PIM-only

Organizer 97 GS introduced the following PIM enhancements:

- A new Multiple Calendar view that lets you graphically display more than one calendar at a time. Organizer lets you display two or more calendars side by side using this 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 the Day per Page view, and you must select the "Display timeslots for Day per page view" option in the Calendar Preferences dialog box.
- Organizer links to Internet sites. You can create a link to launch any Web page.
- A new icon available in your set of SmartIcons that lets you start the Lotus Organizer home page (www.lotus.com/Organizer) with a single click from Organizer.
- A new icon available in your set of SmartIcons that takes you directly to the Web page (www.lotus.com/organizationalmanac) where you can download the updated and expanded Almanac file. Among other things, in this Almanac file you can get information like specific dates for holidays, and specific information regarding time zones, telephone area codes, important 800 telephone numbers, travel tips, time management information, and more.
- An easy way to view your To Do tasks, Calls entries, Planner events, and Anniversary entries in Calendar. Your entries in the To Do, Calls, Planner, and Anniversary sections are now shown through into the Calendar section by default.
- An easy conversion process of Organizer 2.x and Organizer 97 (.OR3) files to Organizer 4.1 files.
- Support for electronic business cards and appointments. For example, you can drag a vCard object into Organizer and add it to your Address section without having to re-enter the information, or drag a vCalendar event from a Web site into Organizer to automatically create a new appointment.
- All of the new features available in Organizer 97, such as time slots in the Day per Page view, support for the Telephony API (TAPI) autodialer, rich text formatting in the Notepad, and support for OLE in the Notepad section.

Note All PIM enhancements are available in both PIM-only and PIM with group scheduling, with the exception of support for the Texas Instruments PDA. You must install Organizer PIM-only (.OR4) if you want to set up support for the Texas Instruments PDA.

PIM with group scheduling

The group-scheduling component of Organizer now incorporates Notes 4.5 as the system that carries messages. All entries (except your Address records) are stored in your Lotus Notes 4.5 mail file (.NSF).

Addresses are added to your local Address Book. Organizer 97 GS also uses the Notes 4.5 Free-Time database and the Resource Reservation database to help you use group scheduling when setting up a meeting or coordinating resources. If you're upgrading from Organizer 2.11, note that Organizer 97 GS doesn't use Lotus Organizer Scheduling Agent 2.1; rather, Organizer 97 GS uses Notes 4.5 to handle scheduling tasks.

Organizer 97 GS introduced the following group-scheduling enhancements, which are available if you install PIM with group scheduling:

- Seamless group scheduling interoperability with Lotus Notes 4.5 group scheduling users
- For Organizer 2.11 interoperability, DLLs to convert scheduling messages between Organizer 97 GS and Organizer 2.11 and a Notes server add-in task that lets Organizer 97 GS users view available free-time for Organizer 2.11 users.

Improvements First Seen in Organizer 97 GS

Organizer 97 GS included the following improvements.

PIM-only (.OR4)

- Access for a user with assistant access to an Organizer 97 GS file with overdue confidential entries
- Ability to customize the mapping (or connecting) of fields while exporting information from the address section
- Ability to create a Calls entry by dragging a To Do task or Notepad page with a phone number to the Phone icon in Toolbox

PIM with group scheduling (.NSF)

- Improved type-ahead functionality in the Schedule Meeting dialog boxes and when opening a file
- Improved validation of the Owner Name field in the Notes Calendar Profile when opening a file
- Improved mapping of Office Home and Business address information between Organizer and Notes 4.6
- Support of Lotus Notes hierarchical names longer than 55 characters
- Addition of time zone information to the subject line of Organizer meeting invitations
- Ability to launch Organizer 97 GS without having Notes 4.6 running in the background
- Ability to edit an Address record created in a Notes 4.6 Address Book while using group scheduling in Organizer
- Organizer documents remain marked as read when viewing through Lotus Notes (First close Notes, then close Organizer. The next time you launch Notes, documents are marked as read.)

PIM-only (.OR4) and PIM with group scheduling (.NSF)

- Display of current local time during daylight savings time in Calendar appointments created from vCalendar entries
- Display entire Zip code (Zip code and extension) in the Home address ZIP code field
- Use of "Print First Line Only" in the Monthly Calendar view when printing from the Calendar section
- Updated information on setup and configuration for the Free Time Plug-in for *Administrator's Guide*

Extra Features on the CD and/or the World Wide Web (the Web)

This section describes additional features available on the Organizer CD-ROM and/or from the Organizer home page on the Web.

Administrator's Guide

Administrator's Guide (ADMGUIDE.RTF) contains important information for administrators about upgrading Organizer group scheduling files (.OR2) to Lotus Notes mail files (.NSF), enabling scheduling with Organizer 2.11, and setting up other tools to enhance group scheduling. You can review *Administrator's Guide* if you're a system administrator for current upgrading information. To open *Administrator's Guide*, place the CD in your drive. Click the Windows Start button and choose Run. Type **D:\LOTUS\ORGANIZE\ADMGUIDE.RTF** in the box. (Note: This assumes that D: is your CD drive.)

The *Administrator's Guide* in Organizer 4.1 has been carried over from Organizer 97 GS. The information contained in this document is still applicable to Organizer 4.1.

Organizer Migration utility

The Organizer Migration utility runs on a Notes server. This utility converts Organizer group scheduling files (.OR2) to Notes mail files (.NSF). To install the Organizer 4.1 Migration utility, place the CD in your drive. Click the Windows Start button and choose Run. Type **D:\EXTRA\MIGRATE\ORGMIGRT.EXE** in the box.

Free-Time Plug-in

The Free-Time Plug-in is a Lotus Notes 4.5 add-in task that lets Organizer users see the free time of Organizer 2.11 users. Free-Time Plug-in works for Organizer 2.11 users who use either cc:Mail or Notes. See *Administrator's Guide* for more information about how to install Free-Time Plug-in.

cc:Mail MTA conversion DLL (ORSCONV.DLL)

cc:Mail MTA v1.1 exchanges messages and directory information between Lotus Notes and cc:Mail users. cc:Mail MTA conversion DLL exchanges scheduling information between Organizer 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 4.1, a meeting invitation is sent as a Notes Meeting Notice Form. When users of these different Organizer versions want to exchange meeting notices, the cc:Mail MTA conversion DLL translates the format of the meeting notice to the proper format required for the receiving program.

Note Organizer 2.11 users with Notes mail-based scheduling can exchange meeting notices with Organizer 4.1 users as e-mail only. Users of both products must convert the e-mail to an appointment after it's received. See *Administrator's Guide* for more information about how to install cc:Mail MTA Conversion DLL.

cc:Mail MTA conversion DLL doesn't determine a cc:Mail or Organizer 4.1 user's availability for a meeting; it only converts the scheduling information between the two products. In other words, cc:Mail MTA conversion DLL doesn't check a user's free time when sending meeting notices. To do that, you must also have Free-Time Plug-in installed. (For more information, see "Free-Time Plug-in," earlier in this file.)

Organizer Web Calendar

Organizer Web Calendar lets remote Internet and corporate intranet users share and manage Organizer calendars and tasks using standard Web browsers. With Organizer Web Calendar, you can do the following tasks:

- View, edit, delete, and create Organizer appointments and tasks securely over the Web.
- Share your calendar and corporate events with important customers, business partners, and mobile users.
- Review your calendar from anywhere in the world by using any computer running Netscape Navigator or Microsoft Internet Explorer.
- Manage your team's calendars. An assistant can update anyone on the team's schedules, so anyone can view and edit up-to-the minute changes in each other's calendars and tasks even while on the road.
- Secure your information with three levels of security. Ensure that only those with the correct password have access to your calendar. Create passwords for "read only" access or for edit capabilities.
- Get a detailed look at your calendar in a daily view, or get the big picture with the weekly or monthly views.
- View your multiple-day events, anniversaries, and phone call reminders.

After Organizer 4.1 and Organizer Web Calendar are installed on a Web server, the administrator can let users know the home page where they can access their Organizer files. Remote users can access existing Organizer files stored on a file server using Netscape Navigator or Microsoft Internet Explorer. In addition, administrators can configure and monitor user access using the Organizer Web Calendar Administration program.

To install Organizer Web Calendar, place the CD in your drive. Click the Windows Start button and choose Run. Type **D:\EXTRA\ORGWEB\ORGWEB.EXE** in the box.

vCalendar and vCard support

Organizer supports electronic business cards and appointments. For example, you can drag a vCard object into Organizer and add it to your Address section without having to re-enter the information, or drag a vCalendar event from a Web site into Organizer to automatically create a new appointment. You use vCalendar and vCard in conjunction with your browser with a helper application. You can download a helper application from:
<http://www.imc.org>

Almanac (Web only)

You can download an updated and expanded Almanac file (ALMANAC.OR4 for PIM users and ALMANAC.NSF and FODORS.NSF for group-scheduling users) from our Web site at www.lotus.com/organizeralmanac. In the Almanac file you can get information like specific dates and specific information regarding holidays, time zones, telephone area codes, important 800 telephone numbers, travel tips, time management information, and more.

General Installation

See *Exploring Organizer* for installation guidelines.

Installation from SmartSuite

SmartSuite's Default and Minimum installations do not offer you the choice to install Organizer for a PIM with Group Scheduling installation, but instead will install Organizer for a PIM-only installation. You must choose the SmartSuite Custom installation to be offered the choice of installing PIM with Group Scheduling.

Automated install

Administrators who want to automate the installation of Organizer 4.1 on their end users' PCs should be aware that in most circumstances, the Lotus online license agreement dialog box will appear during an automated installation, and the user must accept the terms of the license agreement to proceed with the installation. There is one workaround administrators can use to prevent this dialog from appearing: If Organizer is copied to a file server using a default Server installation, and then installed to a local machine using a default Node installation, the administrator can simply delete the LICENSE.TXT file from the server installation, and the dialog will not appear. In all other forms of automated installation, the user will be prompted to accept the license agreement, and there are no other ways to work around this. Lotus is currently investigating ways of eliminating this dialog from other configurations of automated installs.

Note If you install Organizer from a network node, the Organizer Extras dialog box, containing the additional programs for Organizer (EasySync for Organizer, Data Synchronization for Texas Instruments organizer, Corex CardScan, Official Airline Guide, and Acrobat Reader for Organizer) is unavailable. You can install any of the additional programs from the Lotus Organizer 4.1 Premium Edition CD after you finish the node install. To install any of the additional programs, insert the CD in your CD drive. Click the Windows Start button and choose Run. Type **d:\Extras\Org41** and select the program you want to install. Follow the instructions that appear on the screen.

Updated system requirements

Organizer requires 30MB of available hard-disk space on a stand-alone personal computer (PC) or notebook computer (laptop) for a full Organizer installation. An additional 92MB (not 50MB, as stated in *Exploring Organizer*) are required to install additional programs for Organizer, such as OAG, Corex CardScan, and EasySync for PalmPilot and WorkPad. If you install the Organizer 4.1 Migration utility or Organizer Web Calendar, additional hard-disk space is required.

Multilingual Installation

You can install copies of Organizer 4.1 in multiple languages. This capability is part of the Lotus strategy for multilingual computing.

To add an additional language version of Organizer 4.1, you must install Organizer again. The Install program will tell you that you've copied the Organizer application in a different language than the one you want to install and that during installation, the folder structure used with your default language version will be preserved.

When you install different language versions of Organizer, Install creates a Start menu icon for each language installed. For each language installed after the default language, the Start menu icon name will include a 2-character International Standards Organization (ISO) tag to identify the language. If English is the default language, for example, then the Organizer English application will be identified as "Lotus Organizer 4.1 Premium Edition," and the Spanish application will be identified as "Lotus Organizer 4.1 Premium Edition ES."

As you add additional language versions of Organizer 4.1, the Install program populates the Start menu with icons for the additional languages. For example, the icon for the German version of Organizer 4.1 is labeled "Lotus Organizer 4.1 Premium Edition DE."

If you're installing different language versions of Organizer on a server, see Section 14 of the READNET.TXT file for important information on installation executables.

Sharing Address sections in Organizer with group-scheduling

If you install Organizer with group-scheduling, Organizer uses your Lotus Notes Personal Address Book (NAMES.NSF) to display information in your Organizer Address section. To share your Organizer Address section with another user:

1. Copy the Notes Personal Address Book that you want to share to the Notes server.
2. Modify the access control list (ACL) to include the name of the user(s) you want to share your addresses with. The user must have at least read access; if you want the user to be able to change information in your address section, assign the appropriate access level.
3. Change the name to something other than NAMES.NSF (such as ROBIN.NSF). You must have appropriate access to the Notes server to copy a file there. If you don't, see your Notes system administrator.
4. Start Organizer.
5. Include the shared Address section.
6. In Notes, add the shared Address book to your Workspace.
7. Tell the other user where to find your address section.
8. Have the other user start Organizer and include the shared Address section from the Notes server you specify.

Note The most recent change made to either the local version or the server version of the Notes Personal Address Book is saved in both versions when you replicate. A replication conflict *isn't* created.

Information for SmartSuite Users

Using password-protected files in SmartCenter

If you mistype your password, SmartCenter displays a blank copy of your Calendar or Address drawer. To restore these drawers, simply close and then reopen the drawer.

Using SmartCenter Calendar and Address drawers with Organizer PIM-only (.OR4) files

You can use SmartCenter Calendar and Address drawers only with Organizer PIM (.OR4), but not with Organizer with group scheduling (.NSF). If you're using Organizer with group scheduling (.NSF), your Calendar and Address information is stored in your Notes mail file and your Personal Name and Address Book, respectively. You can't use SmartCenter to edit Calendar appointments and Address records stored in .NSF files.

To use SmartCenter Calendar and Address drawers with your .OR4 file, perform the following steps.

1. In SmartCenter, click Calendar.
2. Right-click the Calendar tab.
Note If you're configuring your Address tab, right-click the Address tab.
3. Choose "Folder Properties."
4. Click "File type" and select "Lotus Organizer File."
5. For "Name of Lotus Organizer File," enter the name of your newly converted .OR4 file. If necessary, click Browse to select from a list of files, and click Open.
Note To see newly converted .OR4 files, click "Files of type" and select "All files (*.*)"
6. Click OK.
7. Repeat steps 1 - 6 to configure the Address drawer.

Using Corex CardScan

Corex CardScan is available only with the Organizer standalone version; it is *not* available with Organizer for SmartSuite.

Known Problems

General (PIM with Group Scheduling)

Using Organizer with a Server/Node installation of Lotus Notes

Lotus Organizer 97 GS had some issues when installed for group scheduling with a server/node installation of Lotus Notes. Some of those problems related to the Organizer 97 GS installation program, and others related to Lotus Notes. Organizer 4.1 addresses those problems in a Notes server/node installation which related to Lotus Organizer, but customers may still experience a problem relating to Lotus Notes. If, on running Organizer with a server/node installation of Lotus Notes, you see the error "TZBACK32.DLL file is missing link to missing export NNOTES.DLL", you can correct this problem by changing a Windows registry setting which is improperly configured by some releases of Lotus Notes.

If you see this error message, you must change the Notes registry setting located at HKEY_LOCAL_MACHINE\SOFTWARE\LOTUS\nOTES\4.0\PATH to the Notes program directory on your server. After making this registry change, you will need to uninstall the Organizer node installation from the PC, and reinstall it from the server. If you are deploying node versions of Organizer, you should make this Notes registry change on each PC before running the Organizer node install.

Caution If you're unfamiliar with using Regedit to change registry settings, Lotus strongly suggests that you contact a qualified IS technician for more information.

Organizer .NSF fails to launch after multiple invocations

In situations where Organizer 4.1 installed for Notes group scheduling has been launched, shut down, and restarted again several times without rebooting the PC, Organizer may eventually fail to launch, crashing on startup. This problem may affect customers who do not restart their PC each day, or those customers who shut down and restart Organizer many times each day instead of leaving Organizer running all day. It will only occur if the customer is using the EasyClip feature of Organizer 4.1, and does not occur with a PIM-Only, or .OR4, installation of Organizer.

This problem is related to a known issue in Lotus Notes. To temporarily work around this problem, customers can simply restart their PC when the problem occurs. A system reboot will clear out the memory problems causing this to occur, and allow Organizer to start properly. Alternatively, customers experiencing the problem can elect not to use the EasyClip feature of Organizer 4.1. EasyClip exposes this memory issue in Notes, and if it is not used, the problem should not occur.

Lotus is currently working on a solution to this problem. Please see the Lotus Customer Support Web site at <http://www.support.lotus.com> to obtain the latest information.

Converting Organizer files with customized section names

Before you convert an Organizer 2.x or Organizer 97 (.OR2 or .OR3) file with customized section names (such as renaming "Calendar" to "My Cal") for use in a group scheduling installation of Organizer 4.1, you should:

- Upgrade your mail file for use with Organizer.
- Rename the Organizer 4.1 sections to match the customized names you use in the Organizer 2.x or Organizer 97 (.OR2 or .OR3) file.
- Import the Organizer 2.x or Organizer 97 (OR2 or .OR3) file.

If you do not perform these steps before importing the .OR2 or .OR3 file, once the conversion process is completed, you will have multiple sections of those types whose names you have customized.

Converting an Organizer PIM-only (.OR4) file with preferences

When you convert an Organizer PIM-only (.OR4) file to an Organizer group-scheduling (.NSF) file, your file no longer includes the preferences you set in your original Organizer PIM-only (.OR4) file, such as tab colors or pictures added to the front or back of your binder. Reset your user preferences after you convert your file.

Opening a converted Organizer file

When you convert an Organizer 2.x or Organizer 97 (OR2 or .OR3) file after upgrading your mail file for Organizer 4.1 with group scheduling (.NSF), you may get an error message telling you that the converted file can't be found. Open the converted file manually.

Running out of system resources

If you're running Lotus Notes with Organizer 4.1 and another program and you receive an error message notifying you that you've run out of resources, close the other program.

Organier 4.1 and Notes 5.0

The group scheduling features in Organizer 4.1 have been designed to work with Notes/Domino 4.5x and 4.6x. Notes/Domino 5.0 will be substantially different from these supported releases, and Organizer 4.1 group scheduling configurations will neither install nor run against the Notes/Domino 5.0 back end. Lotus plans to release a future version of Organizer which will support this configuration.

General (PIM-Only)

Creating disk space for converted Organizer files

Because Organizer 4.1 files contain additional features, converted Organizer 2.x or Organizer 97 (.OR3) files will be larger. Delete files you no longer need to create extra disk space for this new group-scheduling file.

Deleting the C:\TEMP folder

Don't delete the C:\TEMP folder; if you do, you won't be able to create a new Organizer PIM-only (.OR4) file. If you've deleted the C:\TEMP folder, create a new C:\TEMP folder.

General (Either PIM-Only or PIM with Group Scheduling)

Redisplaying hidden SmartIcons

If you hide SmartIcons (by right-clicking inside the Organizer binder and choosing "Hide SmartIcons") and later want to re-display them, right-click inside the Organizer binder and choose "Show SmartIcons."

Accessing the Organizer Home Page using Netscape Communicator 4.04

Due to problems with Netscape Communicator 4.04's installation and configuration, you may have trouble using it to access Organizer's home page. If you're using Netscape Communicator 4.04, you may see the following error message when you choose Help - Lotus Internet Support - Lotus Home Page: "Error launching web browser. Please check installation and try again." If you see this error message, you must set Netscape Communicator 4.04 as your default browser by using Regedit to change the Netscape registry setting located at HKEY_CLASSES_ROOT\http\shell\open\command. Change the Default string's "Value data" to "C:\Program Files\Netscape\Navigator\Netscape.exe" -h.

Caution If you're unfamiliar with using Regedit to change registry settings, Lotus strongly suggests that you contact Netscape Customer Support or a qualified IS technician for more information.

Seeing the most recent changes in your Organizer file

You won't automatically see changes made to your Organizer file, such as recently added OAG trip information, or changes made by another user to an Organizer with group scheduling (.NSF) file you're sharing with another user. To see the most recent changes to your file, refresh the view in your Organizer file using any of the methods below:

- Press **F9**.
- Press **Page Up** or **Page Down** to turn the page, then turn back to the selected page.
- Switch to another section and then switch back.

Removing a section and the section's entries

Don't remove a section from your Organizer file unless you want to delete that section's entries as well. For a PIM-Only installation, the information will be removed from your Organizer file permanently. For a PIM with Group Scheduling installation, the information within the section you remove will be deleted from your Notes mail file, and cannot be recovered.

To Do

Changing the Start date of repeating tasks

After creating a set of repeating To Do tasks, don't change the starting date. If you do, you may create duplicate tasks.

Address

Importing information to the Address section

When you import information from a text (.TXT) file or a Comma Separated Values (.CSV) file into the Address section, Organizer removes the leading zeros. As a result, any zip codes that begin with a zero lose the leading zero. (For example, if you add the zip code 02142, only 2142 appears.) Add a space before the leading zero to show the leading zero (for example, to see 02142 rather than 2412).

Upgrading another user's mail file

You may encounter problems with corrupted files when you upgrade another user's mail file (for example, you combine their calendar with your calendar). When the other user opens their Organizer file on their computer and turns to the Address section, they may see a message saying that the section is corrupted. (This also occurs for the following scenario: You install Organizer on one computer and replicate your mail file. You then install Organizer on another computer. When you turn to the Address section in this Organizer file, you see a message saying that the section is corrupted.)

This caused by a problem with the source file for the section you included. Possible problems include:

- The file may be corrupted or may not exist.
- The included section may have been deleted from the file. Check that the section hasn't been deleted from its source file.
- Another user may have the file open. Check that the file isn't currently being used by another user.
- You may have entered the wrong password for the file. Check with the owner of the file to be sure you're using the correct password.

Once you've resolved the problem with the source file, remove the corrupted section and try re-including the section from its source file. To include a section:

1. Choose Section - Include.
2. For "From," enter the name of the file from which you want to include a section.
If necessary, click Browse to see a listing of Organizer files.
3. Under "Section," select the section you want to include.
4. For "Tab name," enter the name you want to give the included section.
5. Click OK.

Calls

Setting alarms for Calls entries

You can't set alarms for Calls entries when you're using Organizer with group-scheduling.

Notepad

Clearing an OLE object after editing a Notepad page

When you exit in-place editing of a Notepad page, the OLE object menu may not clear. (If changing to another Notepad page or going to another section doesn't clear the object, click on the OLE object and then click on the page title.

Exiting in-place editing of an object

To exit in-place editing of an object, don't press **ESC**, but use any of the following methods:

- Click outside of the object in the Notepad page.
- Click in the title of the Notepad page.
- Choose Section -Turn To and select an Organizer section.

- Click an Organizer tab.

Enabling an OLE object's top-level context-sensitive menu

Right-click an OLE object to make the object's top-level menu available.

Using the scroll bar to view OLE objects

Choose Text - Word Wrap to turn on the horizontal scroll bar to view large OLE objects.

Viewing updates to a linked external file

If updates to a linked external file aren't visible in the Notepad page, click the page containing the link to see the updates.

Moving the cursor before or after an OLE object

To place the cursor above or below an OLE object on a Notepad page, press **CTRL+HOME** or **CTRL+END**, then press **ENTER**.

Printing

Testing labels before printing

Before you print labels, you may want to print the labels on a standard paper size (for example, 8 1/2 x 11" or A4) and then compare the printed output to the label layout you want to use. You may need to adjust the margins.

Selecting a print driver

You'll probably get better output if you print with the Windows 95 Hewlett Packard PostScript drivers rather than printing with the PCL5 drivers for the same printer.

Losing information when printing with the landscape orientation

If you're using the landscape printing orientation to print a monthly calendar on certain printers (including the Canon BJC600), you may lose characters from the right edge of the page. Adjust the margins to accommodate the printable area your printer prints in.

Printing envelopes on a Canon BJC-4000 printer

If you're unable to print envelopes on a Canon BJC-4000 printer (after choosing File - Print, clicking Layouts, and selecting either "Envelope #9" or "Envelope #10"), change the orientation and the margins of the layout. To change the orientation and the margins of the layout:

1. Choose Edit - Layouts.
2. Select "Portrait" to change the layout orientation.
3. Click Paper.
4. Under "Margins," change "Top" to 3.5 and change "Bottom" to 1.5 to change the margins.

Backup file

Opening a file from the Backup directory

If Organizer displays a blank binder when you try to open a file from the Backup directory with "Create backup when opened" selected, copy the file to a different location or choose File - User Setup - Organizer Preferences and deselect "Create backup when opened."

Archiving and compacting files

Compacting a multiple-user file

If you're archiving information from a multiple-user Organizer file and have selected "Compact file after archive," the file must not be in use by any other users.

Group scheduling

Changing a repeating appointment to a meeting

If you have a repeating appointment, and you would like to change it to a meeting (that is, you want to invite people to the appointment), delete the repeating appointment and recreate it as a meeting.

Rescheduling a meeting after receiving a confirmation

If you want to reschedule a meeting after the chairperson has sent you a confirmation, you have to propose the rescheduled meeting from the original meeting invitation, not from the confirmation.

Removing duplicate tabs after configuring your server mail file and a local replica

In an Organizer 4.1 group-scheduling (.NSF) file, you open your mail file on the server and configure it for Organizer 4.1. You do the same for a local replica of your mail file. You replicate your local replica with your mail file on the server after you configure each version separately. When you open either your replica or server version of your mail file in Organizer 4.1, you see duplicate tabs for each section in your file. To remove the duplicate tabs, perform the following steps:

1. In Notes, open your mail file on the server.
2. Change to the "All documents" view.
3. Delete all "Do not delete Organizer note - Organizer Database SetupComplete" documents.
4. Start Organizer 4.1 and then open your mail file from the server.
5. When prompted, click Yes to configure your mail file for Organizer 4.1.
6. Replicate your changes to your local replica.

This procedure configures your replica with one set of tabs for each section.

Caution Do *not* delete any entry marked as "Do not delete" under any circumstances except in the scenario described above.

Sending notice of a repeating meeting to an Organizer 2.11 user

Organizer 2.11 users should check their Calendar section after accepting a repeating meeting with selected customized instances (such as every week on Monday and Friday, or every month on the first Tuesday and the third Thursday) from a Notes 4.5 user. This is to ensure that they're aware of any additional appointments beyond the first instance of the appointment. They may only see the initial instance of the repeating meeting.

Sending meeting invitations to attendees not in an Address Book

To invite someone whose name isn't in either a Personal Address Book or a Public Address Book to a meeting using group scheduling, include these invitees to a meeting in an accessible Personal Address Book or Public Address Book. You can also use the Notes invitation form to use names that aren't in an accessible Personal Address Book or Public Address Book.

Resolving a conflicting entry in an included section

To resolve a conflicting entry in an included section after you and another user tried to resolve the same conflicting entry, edit one of the two conflicting entries so that it contains all of the information from both entries then delete the other entry. Remember, only one user should resolve the conflict.

Accepting an Organizer 2.11 meeting invitation using the "Pencil In" option

When you select "Pencil In" to tentatively accept a meeting invitation in Notes 4.5 sent from a chairperson using Organizer 2.11, the meeting response indicates that you accepted the meeting invitation, rather than tentatively accepted it, when the chairperson opens your response. Let the chairperson know that this is a tentative acceptance and not a full acceptance.

Creating entries in another user's Notes mail file

After being given Editor access to another user's Lotus Notes mail file, you may experience problems when you try to create an entry in the Calls, Planner, or Notepad section in Organizer. (An error message appears telling you that you don't have the required access rights to create the entry.) The owner of the file probably hasn't created an entry in the Calls, Planner, or Notepad section of the file you're working in. You can do one of the following:

- Have the owner create entries in those sections first. You can then create new entries in those sections.
- Have the owner choose File - Database - Access Control to open the Access Control List (ACL) and select "Create shared folders/views" to give you editor access for that mail file. You can then create entries in those sections without the owner having to create some entries first.

See the Lotus Notes Help system or your system administrator for more information on modifying the ACL.

Removing meeting invitations from your Inbox after responding to them

After you process your meeting invitations, they still remain in your Lotus Notes Inbox. When you delete the meeting invitations from your Notes Inbox, the corresponding meetings are removed from your calendar. To automatically remove meeting invitations from the Inbox folder after you respond to them, perform the following steps in Notes:

1. Choose Actions - Calendar Tools - Calendar Profile.
2. Click "Advanced Calendar Options."
3. Select "Remove Invitations from my Inbox after I respond to them" and click OK. Notes removes meeting invitations from the Inbox folder but doesn't remove the corresponding meeting entries from the Calendar and Meeting views.

Removing meeting invitation responses from your Notes Inbox

When you send a meeting invitation as chairperson, you may not see some responses in your Meeting Notices dialog box. However, these responses *will* automatically update the meeting status. The meeting invitation still remain in your Notes Inbox. If you delete the meeting notice response from your Notes Inbox, the corresponding status for the invitees is removed from the meeting.

To avoid accidentally deleting an invitee's status for a meeting:

- 1) Create a folder in your mail file and name it "Meeting Responses."
- 2) Move all invitee responses to this folder.

Combined Calendars

Combining your Calendar section with another user's Notes mail file

Before you combine someone else's Notes mail file section with your own Calendar, be sure to set the appropriate access privileges through the Notes Calendar Profile.

EasySync for PalmPilot and WorkPad

Installing EasySync for Organizer conduits to use with EasySync for Notes Mail conduit

If you already installed the EasySync for Notes Mail conduit, you can also install the EasySync for Organizer PIM-only conduits for Calendar, To Do, Address, and Notepad. However, you don't need to install these EasySync for Organizer conduits (that is, Calendar, To Do, Address, or Notepad) if you installed them as part of your EasySync for Notes install along with the Mail conduit. These four conduits work the same way whether you install them from EasySync for Notes or EasySync for Organizer.

Let's say you already installed EasySync for Organizer PIM conduits and later want to install EasySync for Notes conduits. Install **ONLY** the EasySync for Notes Mail conduit, even though all of the other conduits (that is, Calendar, To Do, Address, or Notepad) are available. If you want to use any EasySync for Notes conduits other than the Mail conduit, uninstall the EasySync for Organizer PIM-only conduits first.

Official Airline Guide (OAG)

Installing the OAG default template file

When you install OAG, the OAG default template file, default.oag, is automatically added to the Lotus Organizer work directory (c:\lotus\work\organize). When you send OAG trip information to an Organizer PIM-only (.OR4) file for the first time, the default template file creates:

- A To Do task reminding you to call OAG for an OAG update
- A "Travel" Planner key
- A new Notepad section titled "OAG Itinerary"

If Organizer hasn't been installed yet (that is, the Lotus Organizer work directory doesn't exist yet), the default template file isn't created when you install OAG and the features listed above aren't created. To add the default template file to your Lotus Organizer work directory after installing Organizer, add it from your Lotus Organizer 4.1 Premium Edition CD's \FDDWIN\SYSTEM subdirectory, or re-install the OAG software. If you want to send your OAG trip information to an Organizer with group scheduling (.NSF) file, add the features listed above manually to the Organizer file.

Sending OAG trip information to Organizer for the first time

When you're preparing to send OAG information to Organizer for the first time, you must start Organizer *before* you start OAG. If Organizer isn't opened first, OAG won't be able to determine which Organizer file you want to transfer your OAG trip information to.

Sending OAG trip information to a different Organizer file

If you want to transfer OAG trip information to an Organizer file other than the file specified in the "Organizer File" box:

- Clear the file name from the "Organizer File" box.
- Click OK.
- In the "Organizer File Open" dialog box, browse for the Organizer file you want to select a different file.
- Click OK.

Specifying Organizer sections to receive OAG trip information

OAG can't determine if a section exists in Organizer. If you try to send OAG information to an Organizer section that doesn't exist, the information won't be transferred to Organizer, and you won't receive any notification that this has happened.

Linking your OAG trip plan's corresponding Organizer entries

The "Link Organizer Entries" option in the Update Lotus Organizer dialog box is available *only* if you send OAG trip information to your Notepad section. The "Link Organizer Entries" option is selected by default even if your Organizer file doesn't contain an "OAG Itinerary" or Notepad section. If there is no "OAG Itinerary" or Notepad section, links aren't created even if the option is selected.

Corex CardScan

Using CardScan with Organizer

Corex CardScan is available *only* with the Organizer standalone version; it is *not* available with Organizer for SmartSuite.

Using CardScan and EasySync for Lotus Organizer at the same time

Don't use CardScan and EasySync for Lotus Organizer to send information to your Organizer file at the same time. If you do, Organizer will crash.

Updated CardScan address entry mapping information

The table below contains updated information about field mapping from CardScan to Organizer.

CardScan address entry field	Organizer Address record field
Pager	Home Unused 2
Mobile	Home Unused 1
Direct	Business Tel 1
Other	Home Notes

Mapping information from a CardScan custom phone field to Organizer

Information you enter in a CardScan address entry's first custom phone field maps to the corresponding Organizer Business Address record's "Tel2" field.

Mapping information from a CardScan "Home Fax" field to Organizer

When you map a CardScan address entry with information in the "Home Fax" field to Organizer, the information maps to both the Organizer Home Address record's "Fax" field and the Organizer Business Address record's "Tel2" field.

Editing a CardScan address entry

If you make changes to a CardScan address entry you've already sent to Organizer and then send this edited address entry to Organizer, a new Organizer Address record is created. The original Organizer Address record isn't updated with the changes, nor is there a link between the original Address record and the edited Address record.

EasyClip

Using EasyClip to add entries to an included Organizer section

Included sections don't appear in the "Create entry in" box in the Create entry dialog box when you create an Organizer entry using EasyClip. You can only use EasyClip with sections you create in your Organizer file, not with sections included from another Organizer file.

Using EasyClip to add entries to an Organizer with group scheduling (.NSF) file with multiple sections

EasyClip Help's "Using multiple Organizer sections of the same type" topic states that if you customize your Organizer file with more than one Calendar, To Do, Address, or Notepad section, that you can choose the specific section in which to create the EasyClip entry. However, this feature is available *only* when you send EasyClip information to an Organizer PIM-only (.OR4) file. If you send EasyClip information to an Organizer with group scheduling (.NSF) file, the EasyClip entry is created in the first Calendar, To Do, Address, or Notepad section that appears in your Organizer with group scheduling (.NSF) file.

Changing the address format when creating an address in EasyClip

If you create an address in EasyClip and select a different address format from the "Address Format" box, you lose any changes you made after opening the EasyClip Address dialog box.

Adobe Acrobat

Organizer includes most of the printed documentation that can be read online. This online documentation includes *Exploring Organizer* and *Print Layout Guide* which you view by using Adobe Acrobat 3.0 Reader. You install the Acrobat 3.0 Reader through the Extras dialog box. The updated Acrobat PDF files for Organizer, however, are only installed when you perform a Custom Install. When you highlight the Acrobat 3.0 Reader menu choice in the Extras dialog box, a message appears telling you to perform a Custom Install to install the updated Acrobat files for Organizer.

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