Overview: Address section

The Address section acts like an address book; however, the Organizer electronic Address section lets you do more. For example, you can do the following activities:

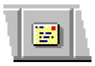
- Sort your Address records by either last name, company, category, zip code -- or use a customized address field you create.
- View your records with either all field information, name and address information, name and contact information, or name and telephone number information.
- Create duplicate Address records for multiple contacts within the same company, without having to copy or re-enter the same company-related information repeatedly. For example, you may know two or more contacts who work in the same company. Once you've entered an Address record for one contact, Organizer can automatically duplicate all company-related information for you when you create an Address record for your other contacts at that company.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS;H_EDITING_AN_ADDRESS_RECORD_STEPS;H_DELETING_AN_ADDRESS_RECORD_STEPS;H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_ADDING_CONTACTS_FROM_THE_SAME_COMPANY_IN_AN_ADDRESS_RECORD_STEPS;H_SORTING_ADDRESSES_STEPS;H_CHANGING_THE_VIEW_OF_ADDRESS_RECORDS_STEPS',0)} See related topics

Adding contacts from the same company in an Address record

You can include more than one contact at the same company. Organizer copies company information from one Address record to another so you don't have to re-enter the same information.

1. Create a new Address record.



2. Enter your contact's name.
3. Enter the company name.
4. Press TAB.

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

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

Tip To create additional Address records, click Add before you click OK. When you finish entering your Address records, click OK.

{button ,AL(`H_SORTING_ADDRESSES_STEPS;H_COPYING_A_FIELD_FROM_ONE_ADDRESS_RECORD_TO_ANOTHER_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS;',0)} See related topics

Details: Changing preferences in Address

Changing your Address preferences
You can change any Address preferences so that your Address information appears and functions the way you want. You can also change Address preferences as frequently as you want.

Using the & (ampersand) to create keyboard shortcuts in field labels
The & (ampersand) in a label for a field indicates that you can access the field with a keyboard shortcut. Keyboard shortcuts help you do things quickly. When you view the field list you'll see that all fields contain an &, for example, &Title. (You'll see this when you select a field and look at the Label text box.) The letter that follows the & is the keyboard shortcut. This means that when you press Alt+T while you are in an Address record, the cursor will move directly to the Title field.

To assign a field a keyboard shortcut, type & before the letter that will serve as the keyboard shortcut in the label text box. Don't use a letter that is already assigned as a keyboard shortcut in another Address record field.

Selecting the type of Address record template you want to appear in front: business or home
Organizer provides you with two different address templates: business and home. The templates look like address cards with tabs.

Depending on the type of address you enter most frequently, it's useful to have the template you use most often always appear in front. The Foreground tab sets where the business or the home address template appears: always in front or always in back.

If you enter both business and home Address records equally, click the Foreground drop-down box to select Selected. The Selected option keeps track of the type of address template you last selected for each particular person, and every time you look up that person's Address record, the address template you last selected for that person will be in front. For example, if you last selected a business Address record for Jim Cooke and last selected a home Address record for Lilly Coppins, and you used Selected as your foreground tab, the business Address record will appear in front for Jim Cooke's Address record, and the home Address record will appear in front for Lilly Coppins' Address record.

Changing a format for a country
You can change what format appears for a country by selecting another format from the Default envelope/label format drop-down box.

When you change the address format for a country, all Address records associated with that country will use the most recent format you select. For example, let's say that last month you created an Address record for a colleague in Scotland. Yesterday, you selected a new address format for Scotland; therefore, the Address record you created last month will adopt the address format selection you made yesterday.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS',1)} Go to procedure

Changing preferences in Address

Address preferences determine how your Address records are sorted and what information appears with them. Changing preferences is optional; if you don't change your Address preferences, Organizer uses the default preferences.

1. Go to the Address section and choose View - Address Preferences.

   See details
2. Under View, select the option for what you want to appear with your Address records.
3. Under Sort by, select the option you want to use to sort your addresses in the current Address section.
4. Under Options, select the appropriate options you want to appear with your Address section.
5. Click the Default envelope/label format drop-down box and select the format you want.
6. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_DETAILS',1)} See details

{button ,AL(`H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_SORTING_ADDRESSES_STEPS;H_CHANGING_THE_VIEW_OF_ADDRESS_RECORDS_STEPS;H_CHANGING_THE_ADDRESS_ENVELOPE_AND/OR_LABEL_FORMAT_STEPS;',0)} See related topics

Details: Changing the address envelope and/or label format

Changing a format for a country

You can change what format appears for a country by entering a country in the Change format text box and selecting another format from the Address format drop-down box.

When you change the address format for a country, all Address records associated with that country will use the most recent format you select. For example, let's say that last month you created an Address record for a colleague in Scotland. Yesterday, you selected a new address format for Scotland; therefore, the Address record you created last month will adopt the address format selection you made yesterday.

Selecting a format

As you scroll through the choices in the Address format drop-down box, you'll see the countries associated with each format. For example, Format 3 is associated with Finland and Switzerland, Format 8 is associated with Sweden, and so on. When you select a format for a country, the name of the country you select becomes associated with that format and appears in the Countries using this format list.

{button ,AL(`H_CHANGING_THE_ADDRESS_ENVELOPE_AND_OR_LABEL_FORMAT_STEPS',1)} Go to procedure

Changing the address envelope and/or label format

You can change how address envelope labels appear.

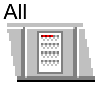
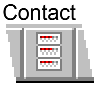
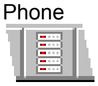
1. Choose Address - Change Envelope/Label Format.
2. For Change format, enter the country whose envelope and/or label you want to change.
   See details
3. Click the Address format drop-down box and select the format you want.
4. Click OK.

{button ,AL(`H_CHANGING_THE_ADDRESS_ENVELOPE_AND_OR_LABEL_FORMAT_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_SORTING_ADDRESSES_STEPS',0)} See related topics

Viewing Address records

The View icons in this table appear in Toolbox. You can click one instead of choosing the command.

Command	Result
All 	Shows all the information associated with the Address record.
Address 	Shows the name, job title, company, address, telephone number, and fax number in the Address record (default).
Contact 	Shows the name, telephone number, fax number, and e-mail address in the Address record.
Phone 	Shows the name and telephone number in the Address record.

Viewing Addresses

View options let you display different kinds of information associated with each of your Address records. At any time, you can change how you want to view your Address records.

1. Go to the Address section.
2. Choose View.
3. Choose one of the following commands: All, Address, Contact, or Phone.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS;H_SORTING_ADDRESSES_STEPS',0)} See related topics

Customizing the appearance and function of your Address section

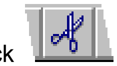
Option	Result
Foreground tab	Places either the Business sort tab (default), the Home sort tab, or the Selected sort tab in front.
Start headings	Places your address headings starting on the right page (default), one after another on the same page, each heading starting at the top of the next page, or each heading starting on the left page.
Show address tabs	Shows (default) or doesn't show the Address business or home tabs.
Show index line	Shows (default) or doesn't show the index line. The index line is the information that you selected to sort by. It appears above the Address record.
Show	Shows or doesn't show (default) a symbol indicating that you made your entry confidential.
Turn to entry after Create/Edit	Goes (default) or doesn't go to the page your Address record is on after you create or edit an Address record.

Note Under Options, you can select the following symbol to show information about an Address record. This symbol appears with the Address record, when you made an Address record confidential.

Symbol	Result
	Indicates that an Address record is confidential.

Details: Deleting an Address record

Deleting an Address record in other ways

You can also select an Address record and then choose Edit - Cut, Edit - Clear, or click  to delete an Address record.

Keyboard shortcuts
You can also select an Address record and then press CTRL+X or press DEL to delete an Address record.

{button ,AL(`H_DELETING_AN_ADDRESS_RECORD_STEPS',1)} Go to procedure

Deleting an Address record

1. Select the Address record you want to delete.
2. Drag and drop the Address record to  in Toolbox.

Note To retrieve a deleted Address record, choose Edit - Undo Address Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_AN_ADDRESS_RECORD_DETAILS',1)} See details

{button ,AL(`H_EDITING_AN_ADDRESS_RECORD_STEPS;H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS;',0)} See related topics

Details: Editing an Address record

Keyboard shortcuts
You can also select an entry and press CTRL+E to edit an Address record.

Editing Address records in other ways
You can also select an entry and choose Edit - Edit Address to edit an Address record.

Editing the existing text of your Address record
To edit the existing address text, click the Address record to select it, click the text you want to edit, and make your changes. When you are done editing, press F2 to enter your changes. When the Edit Address dialog box appears, make your changes, and click OK.

Adding information to Address records you previously left blank
If you want to add information in fields you previously left blank, you must do that in the Edit Address dialog box. Choose Edit - Edit Address.

{button ,AL(`H_EDITING_AN_ADDRESS_RECORD_STEPS',1)} Go to procedure

Editing an Address record

1. Double-click the Address record.
2. Edit the Address record.

   See details

Tip Press TAB to move between options in an Edit Address dialog box.

3. Click OK to enter your changes.

{button ,AL(`H_EDITING_AN_ADDRESS_RECORD_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_CHANGING_THE_ADDRESS_ENVELOPE_AND/OR_LABEL_FORMAT_STEPS',0)} See related topics

Details: Editing field names in Address records

Changing a field name
You can edit any field name in Address records. When you click the Fields button, the Field Labels dialog box appears that lists every assigned field name. When you select the field name you want to change, it appears in the Label text box. Enter the new field name in its place by editing what is there. The changes you make to field names affect the template and will appear in all of your Address records in the current Address section.

Let's say your business associates use two business phone lines: a direct line and a switchboard line. Instead of naming field names Tel 1 and Tel 2, rename them Direct line and Switchboard.

Using the & (ampersand) to create keyboard shortcuts in fields
The & (ampersand) in a field name indicates that you can access the field with a keyboard shortcut. Keyboard shortcuts help you do things quickly. When you view the Field list you'll see that all field labels contain an &, for example, &Title. The letter that follows the & is the keyboard shortcut. This means that when you press ALT+T from within an Address record, the cursor will move directly to the Title field.

To assign a field a keyboard shortcut, type & before the letter that will serve as the keyboard shortcut. Don't use a letter that is already assigned as a keyboard shortcut in another Address record field.

{button ,AL(`H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS',1)} Go to procedure

Editing field names in Address records

1. Choose View - Address Preferences.
2. Click Fields.
3. Select the field name you want to change.
   See details
4. Under Label, enter the new field name.
5. Click OK.
6. Click OK.

{button ,AL(`H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_DETAILS',1)} See details

{button ,AL(`H_EDITING_AN_ADDRESS_RECORD_STEPS;H_ENTERING_BUSINESS_ADDRESS_INFORMATION_STEPS;H_ENTERING_HOME_ADDRESS_INFORMATION_STEPS',0)} See related topics

Entering business information

Option	Result
Job title	Adds the employee's job title to the Address record.
Company	Adds the company name to the Address record.
Street	Adds the company street address to the Address record.
City	Adds the company's city name to the Address record.
State	Adds the company's state name to the Address record.
Zip	Adds the company's zip code number to the Address record.
Country	Adds the company's country name to the Address record.
Tel 1	Adds the employee's telephone number to the Address record.
Ext	Adds the employee's telephone extension number to the Address record.
Fax	Adds the employee's fax number to the Address record.
E-mail	Adds the employee's e-mail address to the Address record.
Tel 2	Adds a second telephone number to the Address record.
Assistant	Adds the employee's assistant's name to the Address record.
Notes	Adds any notes about employee, company, and so on to the Address record.
Categories	Adds any categories associated with employee or company to Address record.
Confidential	Makes Address record confidential so others accessing your files can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Entering home address information

Option	Result
Street	Adds the street address to the Address record.
City	Adds the city name to the Address record.
State	Adds the state name to the Address record.
Zip	Adds the zip code number to the Address record.
Country	Adds the country name to the Address record.
Tel 1	Adds the person's telephone number to the Address record.
Fax	Adds the person's fax number to the Address record.
Tel 2	Adds a second telephone number to the Address record.
E-mail	Adds the person's e-mail address to the Address record.
Unused1	Adds to Address record any information you enter here, for example: Plumber.
Unused2	Adds to the Address record any information you enter in this field, for example, Mary Downing's referral.
Spouse	Adds the spouse's name to the Address record.
Children	Adds the children's names to the Address record.
Notes	Adds notes you want associated with Address record, for example, "Punctual".
Categories	Adds any categories you want assigned to the particular Address record, for example, Home Maintenance.
Confidential	Makes Address record confidential so others accessing your files can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Details: Creating an Address record

Creating Address records in other ways
You can also choose Create - Address or press INS when you are in the Address section to create an Address record.

Entering name and title information
When you enter a name in the Address record, you can assign the title Ms., Mr., Prof., and so on. Click the Title drop-down box to select the title you want.

Additional information for creating Address records
There are a number of Address record fields that you can use to personalize your entries, for example, Notes, Spouse, Children, and Categories. You can use Unused1 and Unused2 in ways that are most useful for you. For example, you can add notes to an Address record field to remind yourself of something; or you can include occupational titles in the Unused fields, such as child-care provider or piano instructor. You can assign categories to your Address record, such as Home Maintenance, Emergency, and so on. Any change you make to a field name affects that field for all Address records in that Address section.

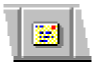
Tip Press TAB to move between fields in an Address record.

{button ,AL(`H_INSERTING_AN_ADDRESS_RECORD_STEPS',1)} Go to procedure

Creating an Address record

You can create two types of Address records: business or home.

1. Go to the Address section and double-click the Address page.



2. Select the type of Address record you want by clicking either the Business tab or the Home tab.
3. Enter a name.

   See details

4. (Optional) If you are creating a business address, enter the optional information you want to appear.

   Note If you use Address record information to dial phone calls from either the Address section or the Calls section, you must include ( ) (parentheses) around the phone number's area code, for example, (508) 555-1234.

5. (Optional) If you are creating a home address, enter the optional information you want to appear.

   Note If you use Address record information to dial phone calls from either the Address section or the Calls section, you must include ( ) (parentheses) around the phone number's area code, for example, (508) 555-1234.

6. Click OK.

Tip To create additional Address records, click Add before you click OK. When you finish entering your Address records, click OK.

{button ,AL(`H_INSERTING_AN_ADDRESS_RECORD_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_EDITING_FIELD_NAMES_IN_AN_ADDRESS_RECORD_STEPS;H_ADDING_CONTACTS_FROM_THE_SAME_COMPANY_IN_AN_ADDRESS_RECORD_STEPS;H_DIALING_A_NUMBER_QUICKLY_STEPS;H_INSERTING_A_CALL_STEPS;',0)} See related topics

Selecting address envelope and/or label formats

Format	Countries	Format	Countries
1	United States, Canada (English), Australia	14	Korea
2	France, Spain	15	Russia
3	Belgium (Flemish), Finland, Sweden	16	China
4	Croatia, Serbia, Slovenia, Czech Republic, Latin America, Poland, Romania	17	Bulgaria
5	Denmark (Internal), The Netherlands	18	Canada (French)
6	United Kingdom, Ireland	19	Italy
7	Norway	20	Malaysia
8	Sweden	21	Turkey
9	Brazil	22	Hungary
10	Germany (Internal)	23	Belgium (French)
11	Greece	24	Iceland (Internal)
12	Austria (Internal)	25	Portugal
13	Japan	26	Germany

Selecting the sort order of Address records

Option	Result
Last name	Sorts your Address records alphabetically by last name (default).
Company	Sorts your Address records alphabetically by company name.
Category	Sorts your Address records alphabetically by category.
Zip	Sorts your Address records by zip code (default) or by any of the other fields you select through this option, such as title, company, and so on.

Selecting what you see with your Address records

View options let you see different kinds of information associated with each Address record.

Option	Result
All	Shows all the information associated with the Address record.
Address	Shows (default) the name, title, company, address, telephone number, and fax number in the Address record.
Contact	Shows the name, telephone number, and fax number in the Address record.
Phone	Shows the name and telephone number in the Address record.

Details: Sorting Addresses

Sorting by category
When you sort by category, Address record page tabs are sorted alphabetically (A through Z), and include # for Address records you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.

{button ,AL(`H_SORTING_ADDRESSES_STEPS',1)} Go to procedure

Sorting addresses

You can sort Address records by last name, company, category, and Address record fields. At any time, you can change how you want to sort your Address records.

1. Go to the Address section.
2. Choose View.
3. Choose one of the following commands: By Last name, By Company, By Zip, and Category.

{button ,AL(`H_SORTING_ADDRESSES_DETAILS',1)} See details
{button ,AL(`H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS',0)} See related topics

Sorting Address records

Command	Result
By Last name	Sorts (default) your Address records alphabetically by last name.
By Company	Sorts your Address records alphabetically by company name.
By Zip	Sorts your Address records by zip code (default) or by any of the other fields you select through this option, such as title, company, and so on.
Category	Sorts your Address records alphabetically by category.

Overview: Anniversary section

You can use the Anniversary section to keep a list of all the important dates that you need to remember every year. An anniversary can be a birthday, a wedding date, or a special day you want to be reminded of. You can enter as many anniversaries as you like. Using Anniversary, you can do the following activities:

- Specify that an anniversary you enter is automatically carried forward every year.
- Sort and view your anniversaries by year, month, category, or zodiac sign.
- Set an alarm to an anniversary to remind you when the anniversary date is current.
- Designate that your anniversaries automatically appear in your Calendar section so you can see the anniversaries in the context of your daily work.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_INSERTING_AN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;',0)} See related topics

Details: Changing preferences in Anniversary

Changing your Anniversary preferences
You can change any Anniversary preferences so that your Anniversary information appears and functions the way you want. You can also change Anniversary preferences as frequently as you want.

Sorting your Anniversaries
Let's say, for example, you categorized the information in your Anniversary section into different categories, including a category for "Family" and a category for "Friends."   You could group together special anniversaries for family and friends by sorting the anniversaries by category.   This would provide you with two separate lists: one for anniversaries for family members and one for anniversaries for friends.

Displaying tabs in Anniversary
Anniversary uses page tabs to group information within the section. The tabs you see depend on the sort order you selected for your anniversaries.

If you sort anniversaries by month or year, Organizer displays year tabs.   If you sort by zodiac, Organizer displays the zodiac signs on tabs.   If you sort by category, Organizer displays alphabetical tabs.

Click a tab to see entries on that page.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS',1)} Go to procedure

Changing preferences in Anniversary

Anniversary preferences determine how your anniversaries are sorted and what information appears with them. Changing preferences is optional; if you don't change your Anniversary preferences, Organizer uses the default preferences.

1. Go to the Anniversary section and choose View - Anniversary Preferences.

   See details
2. Under View, select the option for how you want to sort your Anniversary entries.
3. Under Options, select the appropriate options to customize the appearance and function of the Anniversary section.
4. Under Show, select the appropriate options you want to appear with your Anniversary entries.
5. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_ANNIVERSARY_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Details: Sorting anniversaries

Viewing anniversaries

The sort order determines the way the Anniversary section looks. If you sort by month, a view of 6 months over 2 pages appears. If you sort by year, a view of 12 months over 2 pages appears. If you sort by zodiac sign, tabs with the Zodiac signs appear. If you sort by categories, alphabetical letter tabs appear.

How sorting affects Anniversaries

Sorting your anniversaries changes the way the entries are displayed in your Anniversary section. When you sort by month, anniversary entries for six months of the calendar year are displayed. When you sort by year, anniversary entries for the entire year are displayed. When you sort by zodiac symbol, anniversary entries for the current zodiac sign are displayed. When you sort by category, anniversary entries are sorted alphabetically by category, and includes # for anniversary entries that you didn't assign a category to or that start with non-alphabetical characters, such as @, or a number like 01890.

Displaying tabs in Anniversary

Anniversary uses page tabs to group information within the section. The tabs you see depend on the sort order you select for your anniversaries.

If you sort anniversaries by month or year, Organizer displays year tabs. If you sort by zodiac, Organizer displays the zodiac signs on tabs. If you sort by category, Organizer displays alphabetical tabs.

Click a tab to see entries on that page.

{button ,AL(`H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS',1)} Go to procedure
{button ,AL(`;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS',0)} See related topics

Sorting anniversaries

You can sort anniversaries by month, by year, by zodiac, and by category.

1. Go to Anniversary.
2. Choose View.
3. Choose one of the following commands.

{button ,AL(`H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Customizing the appearance of your Anniversary section

Option	Result
Start headings	Places your anniversaries starting one after another on the same page (default), each anniversary starting on the next page, each starting on the left page, or each starting on the right page.
Show page tabs	Shows (default) or doesn't show the Anniversary page tabs.
Show	Shows or doesn't show (default) a symbol to indicate that you protected, set an alarm for, repeated, or assigned a category to an anniversary. (See Note below.)
Color	Specifies the color of text that anniversary entries appear in.
Turn to entry after Create/Edit	After you create or edit an anniversary, goes (default) or doesn't go to the page on which the anniversary appears.

Note Under Options, you can select the following symbols to show information about an anniversary. Except for , these symbols appear with the anniversary, when appropriate.

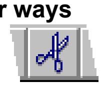
Symbol	Result
	Indicates that an anniversary is confidential.
	Indicates that an anniversary has an alarm.
	Indicates that an anniversary is a repeating entry.
	Indicates that a category symbol appears with anniversaries. The symbol for the category you have specified appears with each anniversary.

Details: Deleting an anniversary

Keyboard shortcuts

You can also delete an anniversary by selecting it, and pressing DEL, or pressing CTRL + X.

Deleting an anniversary in other ways

You can choose Edit - Cut or click  to delete an anniversary.

{button ,AL(`H_DELETING_AN_ANNIVERSARY_STEPS',1)} Go to procedure
{button ,AL(`;H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS',0)} See related topics

Deleting an anniversary

1. Select the anniversary you want to delete.
2. Drag and drop the anniversary to  in Toolbox.

Note To retrieve a deleted anniversary, choose Edit - Undo Anniversary Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_AN_ANNIVERSARY_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Details: Editing an anniversary

Keyboard shortcuts
You can also select the entry and press CTRL+E to edit an Anniversary.

Editing an anniversary in other ways
You can also choose Edit - Edit Anniversary to edit it.

Changing the description
You can click anywhere in the current description in the Edit Anniversary dialog box and enter your changes, or highlight the text and press DEL and enter new text.

Changing the date
Click the Date drop-down box to select a new date.

Adding information to Anniversary fields you previously left blank
If you want to add information in fields you previously left blank, you must do that in the Edit Anniversary dialog box. Choose Edit - Edit Anniversary. When the Edit Anniversary dialog box appears, make your changes and click OK.

Editing the existing text of your Anniversary record
To edit the existing anniversary text, click the Anniversary record to select it, and click the text you want to edit. When you are done editing, press F2 to enter your changes.

Changing the Category
To change the category, click the Categories drop-down box to select a new category from the list that appears.

Changing Occurs on the same date every year
To change the Occurs on same date every year, select the option.

Changing Confidentiality
To change confidentiality, select the Confidential option, or press the F4 key.

{button ,AL(`H_EDITING_AN_ANNIVERSARY_STEPS',1)} Go to procedure

{button ,AL(`;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',0)} See related topics

Editing an anniversary

1. Double-click the anniversary.
2. Edit the anniversary.

   See details

Tip Press tab to move between options in an Edit anniversary dialog box.

3. Click OK.

{button ,AL(`H_EDITING_AN_ANNIVERSARY_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Details: Creating an anniversary

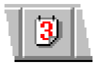
Creating Anniversaries in other ways
You can also choose Create - Anniversary or press INS when you are in the Anniversary section to create an anniversary.

Setting up a variable anniversary
To specify an anniversary that doesn't fall on the same day every year (for example, the Easter holiday) deselect the Occurs on same date every year option and click Repeat. In the Repeat dialog box, under Repeats, click the drop-down boxes to select Monthly (Days), select Every twelfth month on the, and then select the day on which the anniversary occurs (for example, 2nd Sunday).

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS',1)} Go to procedure

Creating an anniversary

1. Go to the Anniversary section and double-click the Anniversary page.



2. Under Description, enter a description of the anniversary.
3. Click the Date drop-down box to select the date for the anniversary.
4. (Optional) You can select the following options for the anniversary.
5. Click OK.

Tip To create additional anniversaries, click Add before you click OK. When you finish entering all your anniversaries, click OK.

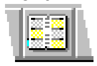
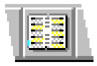
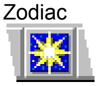
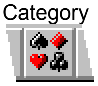
{button ,AL(`H_INSERTING_AN_ANNIVERSARY_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Selecting anniversary options

Option	Result
Categories	Lets you establish one or more categories for the anniversary.
Occurs on same date every year	Enters (default) or doesn't enter the anniversary on the same date every year after the year in which you inserted it.
Confidential	Makes or doesn't make (default) the anniversary confidential, so others accessing your files can't view it.
	If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Selecting a sort order
The sort icons appear in the Toolbox.   You can click one instead of choosing the command.

Option	Result
Month 	Sorts anniversaries by month (default).
Year 	Sorts anniversaries by year.
Zodiac 	Sorts anniversaries by zodiac sign.
Category 	Sorts Anniversary page tabs alphabetically (A through Z) and includes # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.

Selecting what you see with anniversaries

Option	Result
Date	Shows (default) or doesn't show the date with each anniversary.
Categories	Shows or doesn't show (default) the names of the categories you assign each anniversary.
Cost code	Shows or doesn't show (default) the cost code you assign each anniversary.
All lines of description	Shows the entire description of each anniversary, or a number of lines that you specify. The default is All lines of description.

Details: Showing anniversaries in Calendar

Editing an anniversary in Calendar

If you want to edit an anniversary and you're in the Calendar section, double-click the anniversary. The Edit Anniversary dialog box appears. Make your changes and click OK.

Rescheduling an anniversary in Calendar

If you want to change the date of an anniversary and you're in the Calendar section, you can drag and drop the Anniversary entry to a different day on any of the days that appear on your current pages. If you want to reschedule the anniversary to a day on another page, click  in Toolbox, select the Anniversary entry, go to the day you want, and click.

Showing entries while displaying time slots in day per page view

If you are using the Day per Page view, the display of show-through entries is static when you're displaying time slots. The show-through entries do not scroll out of view as you scroll through the day's appointments; that is, the show-through entries stay either above or below the time slots.

To show through entries, Organizer blocks out an area at the top or bottom of your appointments. You can expand or shrink this block by dragging the solid box in the bottom-right corner. The new size of this area affects all pages in the Day per Page view.

Alternatively, you can drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

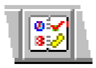
- New Size to use the size you dragged for all pages.
- Temporary Size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16, the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

{button ,AL(`H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_STEPS',1)} Go to procedure

Showing anniversaries in Calendar

Organizer can show entries from To Do, Calls, Planner, and Anniversary sections on the appropriate day in Calendar. Showing entries from other sections can help you see your upcoming commitments in the contents of your daily work - for example, you can see any anniversaries you have entered along with your appointments.

1. Choose Section - Show Through.



2. Click the Show into drop-down box and select Calendar as the section to show into.
3. Under From, select Anniversary.
4. (Optional) Click Preferences and select options for whether anniversaries appear above or below appointments and how much of the anniversary's description to show in Calendar.
5. Click OK.

{button ,AL(`H_SHOWING_ANNIVERSARIES_IN_YOUR_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_INSERTING_AN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_EDITING_AN_ANNIVERSARY_STEPS;H_DELETING_AN_ANNIVERSARY_STEPS;H_CHANGING_THE_SORT_ORDER_OF_ANNIVERSARIES_STEPS;H_ABOUT_ANNIVERSARY_OVER',0)} See related topics

Overview: Bubble Help

Bubble Help gives you information in a bubble when you point to an area of the Organizer screen. Bubble Help is only available if you use a mouse. Bubble Help is not available when a dialog box appears.

Bubble Help is a toggle feature. To turn on or off Bubble Help, do one of the following actions:

- Choose Help - Bubble Help.
- Press CTRL+F1.
- Choose File - User Setup - SmartIcons Setup and select the Show icon descriptions (bubble help) option.
- Click .

When you position your mouse over an area of the screen for which Bubble Help is available, the mouse pointer turns into a bubble with a description of the area of the screen your mouse is pointing to.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Context-sensitive Help

Organizer provides Help based on the function or menu you are using. If you want an overview of an Organizer section, move to the section and click  or press F1.

Organizer displays a Help topic that discusses the section.

To see context-sensitive Help for the Organizer menus, choose a command from the main menu, move the mouse pointer to a command on the pull-down menu, and press F1. Organizer displays a description of the commands. Where appropriate, Help includes cross-references that explain how to use the command in more detail.

If you're in a dialog box, you can click the Help command button or press F1 for information about the contents of the dialog box.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Cross-references

Many Help topics contain cross-references to other related Help topics.

Cross-references appear in green (gray on a monochrome system) with a solid underline. Cross-references are the title of another related Help topic or the words "See details," in which there are details about a topic you are reading.

To display another Help topic using a cross-reference, click the cross-reference with the left mouse button. If you use the keyboard, you can press TAB to move to the cross-reference and then press ENTER.

You can display other cross-referenced information by clicking the "See details" or "See related topics" boxes. See details can appear below a step or at the bottom of some Help topics. See related topics appears at the bottom of some Help topics.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Help Topics

To display Help topics choose Help - Help Topics.

There are several ways to find information in the Help system from this dialog box.

- To find information by reading a Contents page and selecting a Help topic in much the same way that you would use a Table of Contents in a paper-based book., click the Contents tab.
- To find information by seaching for a Help topic by entering a keyword, in much the same way that you would use an Index in a paper-based book, click the Index tab.
- To find information by searching for specific words, click the Find tab.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Help buttons

Once you go to a Help topic, the following buttons appear at the top of the window for Help.

Help Topics

Displays the main Help window.

Print

Prints the Help topic.

Go Back

Displays the last Help topic you viewed. You can move back through each topic, one at a time until you reach the first topic.

Note If you select "See related topics" in a Help topic, the following buttons appear at the bottom of the Topics found window:

- Display - Takes you to the Help topic you selected.
- Cancel - Returns you to the original Help topic.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Using the right mouse button in the Help window

When you are working in Help, you can use the right mouse menu to annotate, copy, print, change the font size, display the Help window on top or not, or change the system colors.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Organizer Help menu

When you are working in Organizer, you can choose the Help command in the main menu to display additional commands.

Help Topics

Displays the Help Topics dialog box.

Bubble Help

Toggles Bubble Help on and off.

Lotus Internet Support

Displays the Lotus Internet Support items.

Tour

Runs the Organizer 97 Tour.

About Lotus Organizer

Displays Organizer release and copyright information.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Using Help

Organizer provides Help for every menu item, dialog box, and function, giving you easy access to information about how to do an Organizer task.   It also provides Help for every command, keyboard shortcut, as well as troubleshooting information, and what's new for this release of Organizer.   There are several ways to access Help (online documentation).

- Choose Help - Help Topics from the Organizer main menu to get Help topics from Contents, Index, and Find.
- Choose Help - Bubble Help to display short descriptions of areas of the Organizer screen.
- Press F1, click , or click a Help button in a dialog box to display context-sensitive Help while you are working in Organizer.

You can display and work in your current Organizer file while a Help window is open. You can resize, move, tile, or cascade the Organizer window or the Help window to make it easier to display and follow Help procedures while in your Organizer file. You can also add Help to the taskbar as an icon.

{button ,AL(`H_ABOUT_THE_ORGANIZER_HELP_MENU_OVER;H_ABOUT_BUBBLE_HELP_OVER;H_ABOUT_HELP_CONTENTS_OVER;H_ABOUT_CONTEXTSENSITIVE_HELP_OVER;H_ABOUT_THE_HELP_BUTTONS_OVER;H_ABOUT_THE_HELP_ICONS_OVER;H_ABOUT_THE_HELP_MENU_OVER;H_ABOUT_CROSSREFERENCES_OVER',0)} See related topics

Overview: Using Help to learn about Organizer

The Organizer Help system offers comprehensive information about Organizer features. The steps below can help you get oriented to Organizer and begin to use its many powerful features. Cross-references to Help topics appear in green; click a cross-reference to go to that Help topic. For a complete guide to using Organizer Help, see Overview: Using Help.

See The Organizer Workspace to familiarize yourself with the Organizer desktop and work area. You can click any area of the screen to see a pop-up description of the area.

Organizer Help includes a number of topics that give an overview of Organizer features. Reading through the following overview topics is a great way to learn about Organizer features and get ideas on how to make Organizer work for you.

- Overview: Calendar section
- Overview: Planner section
- Overview: Address section
- Overview: Notepad section
- Overview: To Do section
- Overview: Calls section
- Overview: Anniversary section
- Overview: Filters
- Overview: Creating a cost code
- Overview: Categories
- Overview: Sharing your files
- Overview: Using Organizer on a notebook computer
- Overview: SmartIcons

Read the following topics to see steps on how to use important Organizer features:

- Starting Organizer
- Opening an Organizer file
- Creating a password
- Moving between sections
- Creating an entry
- Using time tracker
- Dialing a number
- Displaying entries in more than one section
- Creating links
- Printing information in any Organizer section
- Saving an Organizer file
- Archiving information
- Ending Organizer

The following topics contain tables with information on ways to use the mouse and keyboard to perform Organizer tasks:

- Organizer mouse pointer shapes
- Mouse shortcuts
- Keyboard shortcuts
- Editing keys
- Toolbox icons list
- Shortcut menus

If you encounter a software problem you can't solve, return to Help Topics dialog box, click the Contents tab, and select Troubleshooting, and then select Contacting Customer Support or Lotus Customer Support for information on contacting Customer support.

Overview: Calendar section

You use Calendar to manage your schedule. With a click of the mouse, you can create, reschedule, and move appointments. You can also do the following activities:

- Create repeating appointments (such as weekly status meetings) to repeat over as many days, weeks, months, or years that you specify.
- Set an alarm to remind you of a meeting — you can even set the alarm to go off a few minutes before the meeting or attach a file to the alarm so you can print the file before the meeting.
- Find the next available time for an appointment.
- Show information from other sections in the Calendar section; for example, you can display each day's To Do list on that day in Calendar.
- Assign a cost code to an appointment.
- Make an appointment confidential.
- Display a warning for conflicting appointments.
- Categorize an appointment.

The Calendar section also has daily, weekly, and monthly views that give you different ways of looking at your schedule.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CHANGING_THE_CALENDAR_DISPLAY_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS;H_SHARING_CALENDARS_STEPS;H_CALENDAR_VIEWS_OVER;',0)} See related topics

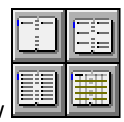
Overview: Calendar views

The Calendar section has four views: day per page, work week, week per page, and month. These views let you display Calendar entries differently.

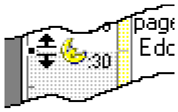
You can easily switch from one view to another as well as specify a default view. For example, on a day-to-day basis you may prefer working with the time slots in the Day per page view, but periodically switch to the month view to get an overview of your schedule. Regardless of the view you're in, you can schedule new appointments, edit existing appointments, and move appointments from one day or time to another.

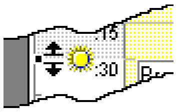
Each view displays the same information in a different format.

- Day per page view displays a single day on each page. You can choose to display appointment times, or time slots, for each day, or only those times for which you scheduled appointments. Displaying the appointment time slots is particularly useful if your day is filled with a series of appointments; for example, medical professionals, sales representatives, and instructors.
- Work week view displays one week across two facing pages. The week starts with Monday, and as each day fills with appointments, you can scroll through the appointments.
- Week per page view displays two weeks on facing pages. The week starts on Monday, and you can scroll through a day's appointments.
- Month view displays an entire month across two facing pages. Organizer displays one line of information for each appointment.

To switch from view to view, use the Calendar View  icons in Toolbox.

{button ,AL(`H_ABOUT_CALENDAR_OVER;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics




:15
:30

Details: Changing preferences in Calendar

Displaying the increments of time slots

The time slot increments are determined by the entry you select in the Calendar Preferences dialog box. For example, if you select 30 minutes, there are time slots every 30 minutes (for example, 8:00, 8:30, 9:00, 9:30, and so on). When you select a day in the Calendar, Organizer displays the time slots for that day. In most Calendar views, Organizer displays only the time slots for which you scheduled an appointment until you select that day.

If you selected to display time slots in the Day per page view, Organizer displays all time slots, both scheduled and available time slots, whether you select the day or not.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS',1)} Go to procedure
{button ,AL(`H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Changing preferences in Calendar

Calendar preferences determine how your calendar looks and how information appears. Changing preferences is optional; if you don't change your Calendar preferences, Organizer uses the default preferences.

1. Go to Calendar and choose View - Calendar Preferences.
2. Under View, select the appropriate options for how you want to display the Calendar section.
3. Under Show, select the appropriate options for what you want to appear with your appointments.
4. Under Options, select the appropriate options to customize the appearance and function of Calendar.

   See details
5. Click OK.

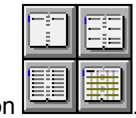
{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CHANGING_THE_CALENDAR_DISPLAY_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS;H_SHARING_CALENDARS_STEPS;',0)} See related topics

Changing the view of appointments

You can easily change from one view to another in the Calendar section.

1. Go to a Calendar page.
2. Choose View.
3. Choose one of the following commands: Day per Page, Work Week, Week per Page, or Month.

Tip To change the Calendar view, you can also click a View icon .

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS;H_SHARING_CALENDARS_STEPS;H_MOVING_FROM_YEAR_TO_YEAR_IN_CALENDAR_STEPS;H_DISPLAYING_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_STEPS;',0)} See related topics

Details: Changing the day start and end times from the Day per page view

Changing the day start and end times in other ways
You can also choose View - Calendar Preferences to change the default start and end times.

{button ,AL(`H_CHANGING_THE_DAY_START_AND_END_TIMES_FROM_DAY_PER_PAGE_VIEW_STEPS',1)}
Go to procedure

Changing the day start and end times from Day per page view

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

1. Do one of the following:
   - Position the mouse pointer on the solid box to the left of the current start time.
   - Position the mouse pointer on the solid box to the left of the current end time.
2. Drag the solid box to change the time.

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

{button ,AL(`H_CHANGING_THE_DAY_START_AND_END_TIMES_FROM_DAY_PER_PAGE_VIEW_DETAILS',1)} See details

{button ,AL(`H_DISPLAYING_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_STEPS;H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Changing the time slot increments from the Day per page view

When you are displaying time slots in the Day per page view, you can dynamically change the default time slot increments for the Calendar section.

1. Position the mouse pointer on a time line on the time ruler.
2. Drag up to decrease the increments; drag down to increase the increments.

   The increments can be 5, 10, 15, 20, 30, or 60 minutes.

Note You can also choose View - Calendar Preferences to change the default time slot increments.

{button ,AL(`H_DISPLAYING_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_STEPS;H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Correcting the time for Today's date and Clock icons

The Today's date and Clock icons in Toolbox display the system date and time. If the system date and time aren't correct, use the Windows Control Panel to change them.

Customizing the appearance of your Calendar section

Option	Result
Days start at	Lets you set the time at which each day in your Calendar begins. The default is 8:00 AM.
Days end at	Lets you set the time at which each day in your Calendar ends. The default is 6:00 PM.
Time slots	Lets you set the time increments for appointments in your Calendar. The default is 30 minutes.
Default duration	Lets you set the default duration for appointments. The default is 60 minutes.
Show	Shows or doesn't show (default) a symbol to indicate that you protected, set an alarm for, repeated, penciled in, and/or assigned a category to an appointment. (See Note below.)
Display time slots for day per page view	Displays (default) or doesn't display time slots in the Day per page view. The default time slot is 30 minutes.
Show conflicts	Alerts (default) or doesn't alert you when you create an appointment that conflicts with another appointment.
Show time tracker	Shows (default) or doesn't show Time Tracker when you select an appointment to edit it directly on a Calendar page.
Include weekends in Find Time search	Determines whether Organizer does or doesn't (default) include weekends when searching for the next available appointment time. (When you create or edit an appointment, you can choose to find the next available time.)
Turn to entry after Create/Edit	After you create or edit an appointment, Organizer goes (default) or doesn't go to the page on which the appointment appears.

Note Under Options, you can select the following symbols to show with your appointments. Except for , these symbols appear with the appointment in Calendar, when appropriate.

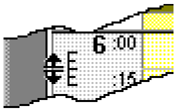
Symbol	Result
	Indicates that an appointment is confidential.
	Indicates that an appointment has an alarm.
	Indicates that an appointment is a repeating entry.
	Indicates that a category symbol appears with appointments. The symbol for the category you specified appears with each appointment.

Displaying time slots in the Day per page view

1. Go to Calendar.
2. Choose View - Calendar Preferences.
3. Select the Display time slots for Day per page view option.
4. Click OK.

The time slots will appear the next time you choose the Day per page view.

{button ,AL(`H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics


6 :00
:15

Moving from year to year in Calendar

1. Click the Calendar section tab to display the yearly calendar.

   Today's date appears outlined in red. Year tabs appear along the left and right edges of the calendar.
2. (Optional) To display the Calendar for a different year, do one of the following: click the appropriate year tab, or click the page turners to go to the previous or next year.
3. (Optional) To display the previous or next decade, click the year tab on the top-left or bottom-right edge.
4. Double-click the date (day of month) you want to go to.

Tip To go directly to today's date, click the Today's date icon 

in Toolbox.

{button ,AL(`H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CALENDAR_VIEWS_OVER;',0)} See related topics

Penciling in an appointment

You can make a tentative appointment, or pencil in, when you create or edit the appointment.

1. Select the appointment.
2. Choose Appointment - Pencil In.

   In the weekly and daily views, Organizer displays the for that appointment.

To remove the and change the appointment from penciled in to booked, repeat this procedure.

{button ,AL(`H_CHANGING_MEETING_NOTICES_PREFERENCES_STEPS;H_ACCEPTING_AN_INVITATION_STEPS;H_DECLINING_AN_INVITATION_STEPS;H_DELEGATING_AN_INVITATION_STEPS;H_PROPOSING_A_MEETING_CHANGE_STEPS;H_RESPONDING_TO_A_DECLINED_MEETING_CHANGE_STEPS;H_READING_AN_ATTACHMENT_STEPS;H_PROCESSING_UPDATE_AND_CANCELLATION_NOTICES_STEPS;H_DELETING_A_MEETING_FROM_YOUR_CALENDAR_STEPS;H_VIEWING_THE_STATUS_OF_ATTENDEES_STEPS;H_RESPONDING_TO_MEETING_INVITATIONS_AS_AN_ASSISTANT_STEPS;H_PROCESSING_DELIVERY_FAILURE_NOTICES_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_ASSIGNING_A_COSE_CODE_TO_AN_ENTRY_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_MAKING_AN_APPOINTMENT_STEPS;',0)} See related topics

Selecting a Calendar view

Option	Result
Day per page	Displays one day per page; optionally, also displays appointment time slots for each day.
Work week	Displays one week across two pages (default).
Week per page	Displays one week per page.
Month	Displays one month across two pages.

Selecting what you see with your appointments

Option	Result
End time	Shows or doesn't show (default) the end time of the appointment.
Duration	Shows or doesn't show (default) the duration of the appointment.
Categories	Shows or doesn't show (default) the names of categories you assign to an appointment.
Cost code	Shows or doesn't show (default) the cost and customer codes you specify for an appointment.
Lines of description	Lets you specify the number of lines of description displayed for an appointment. Enter a number, or type the word "All" (default) to display all lines.

Specifying the display of show through entries

Option	Result
Above appointments	Displays the entries above your appointments (default).
Below appointments	Displays the entries below your appointments.
First line only	Displays only the first line of each entry.

Details: Showing Calendar appointments in Planner

Changing the appearance of Calendar appointments in Planner
Calendar appointments show as small color blocks in Planner. The default color is black.

{button ,AL(`H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS',1)} Go to procedure

{button ,AL(`H_CHANGING_PREFERENCES_IN_PLANNER_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DISPLAYING_ENTRIES_IN_MORE_THAN_ONE_SECTION_STEPS',0)} See related topics

Showing Calendar appointments in Planner

1. Choose Section - Show Through.

2. Click the Show into drop-down box and select Planner.
3. Under From, select Calendar.
4. (Optional) Click Preferences to change the color in which the Calendar appointments appear, then click OK. (The default color is black.)
5. Click OK.

{button ,AL(`H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CHANGING_THE_CALENDAR_DISPLAY_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_SHARING_CALENDARS_STEPS',0)} See related topics

Details: Showing entries from other sections in Calendar

Showing entries while displaying time slots in Day per page view
If you are using the Day per page view with time slots, entries you show through in the Calendar don't scroll out of view as you scroll through the day's appointments; that is, these entries stay either above or below the time slots.

Organizer blocks out an area at the top or bottom of your appointments for show-through entries. You can expand or shrink this block by dragging the solid box in the bottom-right corner. The new size of this area affects all pages in the Day per page view.

You can also drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

- New Size to use the size you dragged for all pages.
- Temporary Size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16 the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

Editing entries in Calendar
If you want to edit a To Do task and you're in the Calendar section, double-click the entry that appears in Calendar. The Edit dialog box appears for the kind of entry you want to edit: Edit To Do, Edit Calls, and so on. Make your changes and click OK.

{button ,AL(`H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS',1)} Go to procedure
{button ,AL(`H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Showing entries from other sections in Calendar

Organizer can show entries from the To Do, Calls, Planner, and Anniversary sections on the appropriate day in Calendar. Showing entries from other sections can help you see your upcoming commitments in the context of your daily work, for example, you can see your To Do tasks for the day along with your appointments.

1. Choose Section - Show Through.

2. If necessary, click the Show into drop-down box and select Calendar.
3. Under From, select the sections whose entries you want to appear in Calendar.
4. (Optional) Click Preferences and select the appropriate options to place the entries above or below your appointments, and to specify how much of the entries' descriptions to show.
5. Click OK.

{button ,AL(`H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;H_CHANGING_THE_CALENDAR_DISPLAY_STEPS;H_SHOWING_CALENDAR_APPOINTMENTS_IN_PLANNER_STEPS;H_SHARING_CALENDARS_STEPS;',0)} See related topics

Conflicting appointments
Conflicting appointments are displayed side-by-side in this view. You can see at a glance that a conflict exists, and decide which appointment to move.

The day's appointments

The time slots reflect the settings specified in the Calendar Preferences dialog box. The grayed times are the hours before and after the day's start and end times. There is a solid box next to a day's start and end times. You can drag this box to change the start and end times for all Calendar days.

To create an appointment, just click a time and start typing. Each appointment's time is blocked out, showing the start and end time, and the description. To change an appointment's duration, you can drag the appointment's top or bottom border to the appropriate time.

If you cannot display all the day's appointments at once, click the scroll arrows to bring other times into view. The color of the scroll arrows changes depending on whether or not the times you can't see have available or booked time slots.

- A black arrow indicates there are available times slots, and no scheduled appointments.
- A blue arrow indicates there are scheduled appointments.
- A gray arrow indicates that you are at midnight, and that you can scroll the time slots only in the opposite direction, but not into the next or previous day.

The time slot increments (for example, every 15 or 30 minutes) also reflect the setting specified in the Calendar Preferences dialog box. You can also change the increments from this view by dragging a time line on the time ruler.

Display of long descriptions

Sometimes an appointment's description is too long to fit in the appointment's time slot. When this happens, Organizer displays as much of the description as possible and a serrated border across the bottom of the appointment.

To expand the appointment so you can read it, position the mouse pointer on the appointment. After a short pause, Organizer expands the appointment.

When you expand the appointment, Organizer displays time lines on the left and right edges of the appointment to show the appointment's start and end time.

Display of appointments that are shorter than the default duration

When an appointment is shorter than the default duration, Organizer displays hatch marks to represent the appointment. For example, this appointment has a duration of 15 minutes, but the default duration is 30 minutes.

To open the appointment so you can read it, do one of the following:

- Position the mouse pointer over the appointment. After a short pause, Organizer opens the appointment.
- Position the mouse pointer over the appointment and click.

Showing entries from other sections

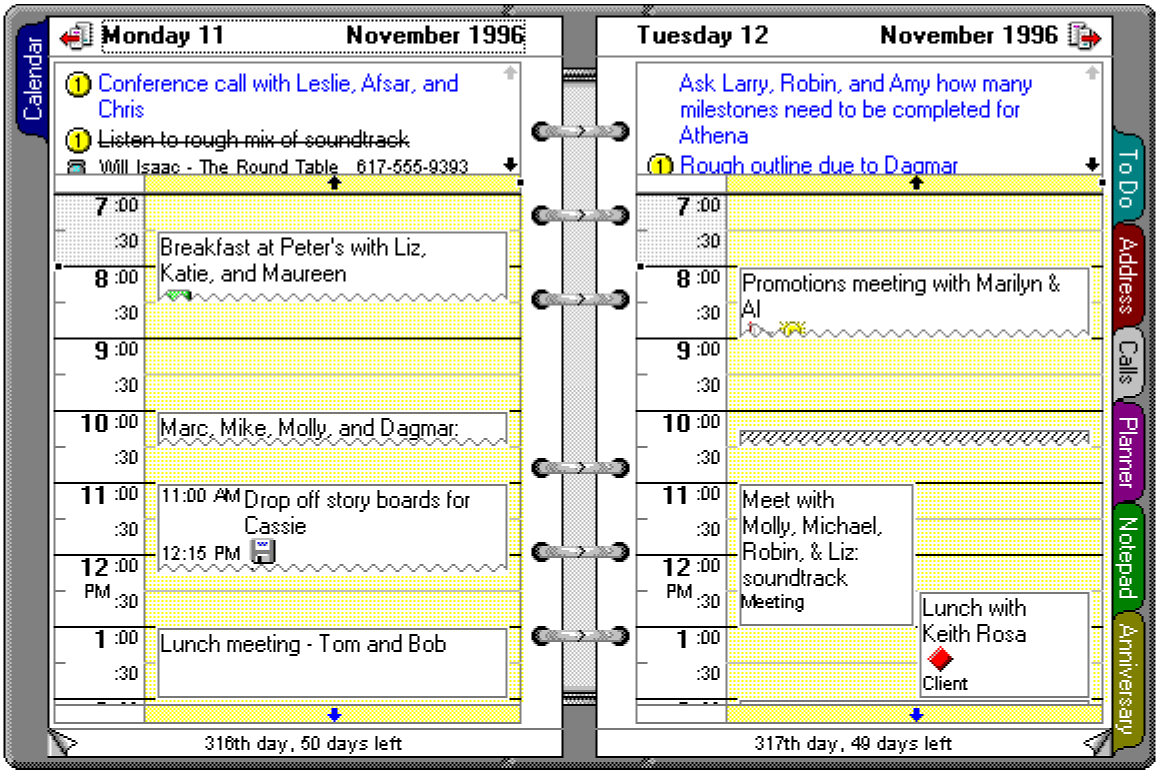
This example shows through entries from the To Do and Anniversary sections in Calendar. When you're working with time slots in the Day per page view, Organizer blocks out an area at the top or bottom of the day in which to display the shown-through entries. You can change the size of this area by dragging the solid box at the lower-right corner of the block.

Overview: Working with time slots in the Day per page view

Displaying time slots in the Day per page view is particularly useful for people whose day is a series of scheduled appointments because both booked and available time slots are displayed. As with other Calendar views, you can show through entries from other sections — such as To Do and Calls — along with the time slots.

With time slots, you create, edit, and manage your appointments as easily as in the other Calendar views. In addition, you can dynamically change the default day start and end times, and time slot increments from the Calendar page.

The following illustration shows time slots in the Day per page view. The dotted lines designate areas for which there is additional Help. Click within one of these areas to display its Help topic.



{button ,AL(`H_DISPLAYING_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_STEPS;H_CALENDAR_VIEWS_OVER;H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_CHANGING_THE_DAY_START_AND_END_TIMES_FROM_DAY_PER_PAGE_VIEW_STEPS;H_CHANGING_THE_TIME_SLOT_INCREMENTS_FROM_DAY_PER_PAGE_VIEW_STEPS;',0)} See related topics

Overview: Calls section

The Calls section lets you create Calls entries to keep track of your phone calls. With the Calls section, you can do the following activities:

- Record both your incoming and outgoing calls, including information on who the call was from or to, the duration of the calls, and any notes on the calls.
- Track the status of follow-up calls.
- Automatically track the duration of a call when you answer it.
- Assign a cost code to a Calls entry.
- Schedule calls you want to make at some future date and set an alarm to remind yourself.
- Quickly redial unanswered calls.
- Dial any phone number that appears in your Address section, Calls section, or any other section.
- Show through Calls entries in your Calendar section.

Note You must install and set up a modem to make calls from Organizer.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} <u>See related topics</u>

Details: Changing preferences in Calls

Displaying alphabetical and date tabs

Calls uses page tabs to group information within the section. The tabs you see depend on the way you sort your Calls entries.

If you sort your Calls entries by person, company, or category, Organizer displays alphabetical tabs. If you sort by date, Organizer displays tabs with months.

If you sort your Calls entries by status, Organizer sorts and displays Calls entries by status: Planned, Try Later, Answered, Incoming, Left Message, Calling Back, No Answer, Follow Up, or Busy. If you sort your Calls entries by number, Organizer sorts and displays each Calls entry by phone number. If you sort your Calls entries by incomplete, Organizer sorts and displays Calls entries incomplete first, and then completed, in date and time order.

You can click a page tab to go to that page. If there are no page tabs, turn the pages by clicking the page turners in the bottom left and bottom right corners.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS',1)} Go to procedure

Changing preferences in Calls

Calls preferences determine how Calls entries are sorted in your Calls section and what information appears with them. Changing preferences is optional; if you don't change your Calls preferences, Organizer uses the default preferences.

1. Go to the Calls section and choose View - Calls Preferences.
2. Under View, select the appropriate option for how you want Organizer to sort your Calls entries.
3. Under Options, select the appropriate options to customize the appearance and function of the Calls section. See details
4. Under Show, select the appropriate options you want to appear with your Calls entries.
5. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Changing the sort order of Calls entries

How sorting affects Calls sort tabs

Calls uses page tabs to group information within the section. The tabs you see depend on the way you sort your Calls entries.

If you sort your Calls entries by person, company, or category, Organizer displays alphabetical page tabs. (Organizer includes # for Calls entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.) If you sort by date, Organizer displays tabs with month names.

{button ,AL(`H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',1)} Go to procedure
{button ,AL(`;H_CHANGING_PREFERENCES_IN_CALLS_STEPS',0)} See related topics

Sorting Calls entries

You can sort Calls entries by name, company, date, category, status, telephone number, and so on. At any time, you can change how you want to sort your Calls entries.

1. Go to the Calls section.
2. Choose View.
3. Choose one of the following commands: By Person, By Company, By Date, By Category.

{button ,AL(`H_CHANGING_THE_SORT_ORDER_OF_CALLS_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;',0)} See related topics

Customizing the appearance of your Calls section

Option	Result
Start headings	Places your Calls entries one after another on the same page, each Calls entry starting at the top of the next page, each Calls entry starting on the left page, or each Calls entry starting on the right page (default).
Show page tabs	Shows (default) or doesn't show the Calls page tabs.
Show	Shows or doesn't show (default) a symbol indicating that you made a Calls entry confidential, set an alarm for it, set it to repeat, or assigned it a category. (See note below)
Show completed calls	Shows (default) or doesn't show Calls entries that are completed. When you show completed Calls entries, Organizer displays the entry with a check mark.
Strikeout	Shows or doesn't show (default) text in completed Calls entries with a line through the text.
Turn to entry after Create/Edit	Goes (default) or doesn't go to the page the Calls entry is on after you create or edit a Calls entry.

Note Under Options, you can select the following symbols to show information about a Calls entry. Except for , these symbols appear with the Calls entry, when appropriate.

Symbol	Result
	Indicates that a Calls entry is confidential.
	Indicates that a Calls entry has an alarm.
	Indicates that a Calls entry is a repeating entry.
	Indicates that a category symbol appears with your Calls entries. The symbol for the category you specified appears with each Calls entry.

Details: Deleting a Calls entry

Keyboard shortcuts

You can also select the entry and press CTRL+X or DEL to delete a Calls entry.

Deleting a Calls entry in other ways

You can also select the entry and choose Edit - Cut, Edit - Clear, or click  to delete a Calls entry.

{button ,AL(`H_DELETING_A_CALL_STEPS',1)} Go to procedure
{button ,AL(`;H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS',0)} See related topics

Deleting a Calls entry

1. Select the Calls entry you want to delete.
2. Drag and drop the Calls entry to

 in Toolbox.

Note To retrieve a deleted Calls entry, choose Edit - Undo Calls Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_A_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Editing a Calls entry

Keyboard shortcuts
You can also select an entry and press CTRL+E to edit a Calls entry.

Editing Calls entries in other ways
You can also select an entry and choose Edit - Edit Calls to edit a Calls entry.

Editing the existing text of your Calls entry
To edit the existing Calls entry text, click the Calls entry to select it, and click the text you want to edit. When you are done editing, press F2 to enter your changes.

Adding information to Calls entries you previously left blank
If you want to add information in fields you previously left blank, you must do that in the Edit Call dialog box. Choose Edit - Edit Call. When the Edit Call dialog box appears, make your changes, and click OK.

{button ,AL(`H_EDITING_A_CALL_STEPS',1)} Go to procedure

{button ,AL(`;H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_STEPS',0)} See related topics

Editing a Calls entry

1. Double-click the Calls entry.
2. Edit the Calls entry.

   See details

Tip Press TAB to move between options in an Edit Call dialog box.

3. Click OK.

{button ,AL(`H_EDITING_A_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Creating a Calls entry

Creating Calls entries in other ways
You can also choose Create - Call or press INS when you are in the Calls section to create a Calls entry.

Entering the contact name and company
If you entered names and addresses in the Address section, they appear in the name and company drop-down boxes.

Organizer attempts to match any part of the Address record you specify with the rest of the Address record. For example, if you click the Last name drop-down box and select a name from the list, Organizer supplies the person's company name and phone number.

Entering the contact phone number
After you select a contact name or company name, you can click the Phone at drop-down box to select any phone number associated with that name or company. If you don't use an Address record to specify information for your call, the Phone at drop-down box uses "The phone number entered below." In this case you must specify a phone number for the Phone number text box.

Note If you use a phone number from an Address record to dial a call, you must include ( ) (parentheses) around the phone number's area code in the Address record, for example, (508) 555-1234.

Specifying the date and time of a call
If you're planning a Calls entry for the future, you can enter the date and the time you want to make the Calls entry. If you're creating a Calls entry you already made, you can optionally include the duration of the Calls entry.

If you set the duration of the call by clicking the Time drop-down box and use time tracker, Organizer automatically adjusts the duration of the call in the Duration field. You can also click the + (plus) to increase or the - (minus) to decrease the duration.

If you're creating a Calls entry as you're making the call, you can click the stopwatch when you start the phone call. The Organizer stopwatch automatically times the duration of the call, until you click the stopwatch again, at the end of your phone call.

Dialing the Calls entry
You can click Dial to dial the number of the Calls entry you created. You must install a modem and set up the modem in the Windows 95 Control Panel before dialing a phone number from Organizer.

{button ,AL(`H_INSERTING_A_CALL_STEPS',1)} Go to procedure

Creating a Calls entry

1. Go to the Calls section and double-click the Calls page.

2. Enter the contact's first name, last name, and company.

   See details

3. Click the Phone at drop-down box and select the telephone number you want to use.

   See details

4. Under Phone number, specify the appropriate options.

   See details

5. Click the Notes tab.
6. Under Notes, enter a description of the Calls entry.
7. If necessary, click the Date and Time drop-down boxes and select a date and time for the call.

   See details

8. Select the following options for the Calls entry: Categories, Status, Completed, Confidential.
9. Click OK.

Tip To create additional Calls entries, click Add before you click OK. When you finish entering all your Calls entries, click OK.

{button ,AL(`H_INSERTING_A_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS;H_DIALING_A_NUMBER_STEPS',0)} See related topics

Details: Creating a follow-up Calls entry

Creating a follow-up Calls entry in other ways
You can also create a follow-up Calls entry for a Calls entry by choosing Edit - Edit Call and clicking Follow Up in the Edit Call dialog box.

Linking a follow-up Calls entry to the original Calls entry
If you don't deselect the Link to option, by default, Organizer automatically links the follow-up Calls entry you are creating to the original Calls entry.

{button ,AL(`H_INSERTING_A_FOLLOWUP_CALL_STEPS',1)} Go to procedure

{button ,AL(`;H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_STEPS',0)} See related topics

Creating a follow-up Calls entry

1. Go to the Calls section.
2. Select the Calls entry you want to create a follow-up call for and choose Call - Follow Up.
3. If necessary, enter the date, time, and duration of the follow-up call.
4. Under Notes, add any additional information or edit information in the description of the follow-up Calls entry.
5. Click the Contact tab.
6. If necessary, edit any other part of the Calls entry for the Contact panel.
7. (Optional) If you don't want the Calls entry to be linked to the original Calls entry, click the Link to option to deselect the option.

   See details
8. Click OK.

{button ,AL(`H_INSERTING_A_FOLLOWUP_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_LOGGING_AN_INCOMING_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Details: Creating a Calls entry for incoming calls

Entering information about the caller

If you entered information about the caller in your Address section, you can access the caller's Address record when you specify these fields. If you click the Last name drop-down box, Organizer lists the last names in the Address section; if you click the Company drop-down box, Organizer lists company names.

Organizer attempts to match any part of the Address record you specify with the rest of the record. For example, if you click the Last name drop-down box and select a name from the list, Organizer supplies the person's company name and phone number. If you can't use an Address record to specify information about the call, the Phone at drop-down box uses "The phone number entered below," and you must specify a phone number for the Phone number box

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{button ,AL(`H_LOGGING_AN_INCOMING_CALL_STEPS',1)} Go to procedure

Creating a Calls entry for incoming calls

If you answer a phone call and you want to track information about the call in a Calls entry, Organizer offers a shortcut.

1. Choose Phone - Incoming Call.

Organizer displays the Answer Call dialog box.

2. Click the Notes tab.

   The current date and time are already entered.

3. Under Notes, enter a description of the Calls entry.
4. When you finish your call, click the stopwatch to stop timing your call.
5. Select the following options for the call: Categories, Status, Completed, Confidential.
6. Click the Contact tab.
7. Enter the appropriate information about the person: first name, last name, company and phone number.

   See details

8. Click OK.

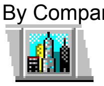
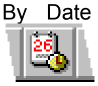
Tip To create additional Calls entries, click Add before you click OK. When you finish entering all your Calls entries, click OK.

{button ,AL(`H_LOGGING_AN_INCOMING_CALL_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS;H_EDITING_A_CALL_STEPS;H_INSERTING_A_FOLLOWUP_CALL_STEPS;H_DELETING_A_CALL_STEPS;H_CHANGING_THE_SORT_ORDER_OF_CALLS_STEPS',0)} See related topics

Selecting a sort order

The Sort icons appear in Toolbox. You can click one instead of choosing the command.

Option	Result
By Name 	Sorts and displays Calls entries by last name (default).
By Company 	Sorts and displays Calls entries by company name.
By Date 	Sorts and displays Calls entries by date and time.
By Category 	Sorts and displays Calls entries by category.

Selecting a sort order

Option	Result
Person	Sorts Calls entries by last name (default).
Company	Sorts and displays Calls entries by company name.
Date	Sorts and displays Calls entries by date and time.
Category	Sorts and displays Calls entries by category, and includes # for entries you didn't assign a category to or that starts with non-alphabetical characters, such as @, or numbers like 01890.
Status	Lets you select the criteria by which to sort and display Calls entries. You can choose Status (default), Number, or Incomplete.

Selecting what you see with Calls entries

Show options let you see a variety of information associated with each Calls entry.

Option	Result
Name	Shows (default) or doesn't show the name of the person the Calls entry is to.
Company	Shows (default) or doesn't show the name of the company the Calls entry is to.
Status	Shows (default) or doesn't show the status of the Calls entry.
Categories	Shows or doesn't show (default) the names of the categories you assigned the Calls entry.
Lines of description	Shows a specified number of lines of description with the Calls entry. You can enter a number or click + (plus) to increase or - (minus) to decrease the number of lines. (The default is 3.)
Number	Shows (default) or doesn't show the phone number of the Calls entry.
Date & time	Shows (default) or doesn't show the date and time of the Calls entry.
Cost code	Shows or doesn't show (default) the cost code you assigned the Calls entry.

Setting Phone number options

Option	Result
Use Country and Area codes	Uses (default) or doesn't use the country and area codes of a telephone number when Organizer dials a telephone number.
Area code	Lets you specify the area code of the telephone number you want to call.
Phone number	Lets you specify the telephone number you want to call.
Ext	Lets you specify the extension number of the telephone number you want to call.
Country code	Lets you select a specific country code for a Calls entry.

Details: Showing Calls entries in your Calendar

Working with Calls entries in Calendar
Showing Calls entries in Calendar lets you see your Calls entries on their appropriate calendar day, along with your appointments.

Editing a Calls entry in Calendar
If you want to edit a Calls entry and you're in the Calendar section, double-click the Calls entry. The Edit Call dialog box appears. Make your changes and click OK.

Rescheduling a Calls entry in Calendar
If you want to reschedule a call and you're in the Calendar section, drag and drop the Calls entry to a different day. The date of the Calls entry automatically changes; the time stays the same. If you want to reschedule a Calls entry to a day that doesn't appear on your secreen, click  in Toolbox, select the Calls entry, go to the day you want, and double-click.

Showing entries while displaying time slots in Day per page view
If you're using the Day per page view with time slots, the entries you show through in Calendar don't scroll out of view as you scroll through the day's appointments; that is, these entries stay either above or below the time slots.

Organizer blocks out an area at the top or bottom of your appointments for entries you show through in Calendar. You can expand or shrink this block by dragging the solid box in the bottom-right corner. The new size of this area affects all pages in the Day per page view.

You can also drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

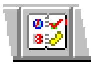
- New Size to use the size you dragged for all pages.
- Temporary Size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16 the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

{button ,AL(`H_SHOWING_CALLS_ENTRIES_IN_YOUR_CALENDAR_STEPS',1)} Go to procedure
{button ,AL(`H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS;H_EDITING_A_CALL_STEPS',0)} See related topics

Showing Calls entries in Calendar

You can show Calls entries in the Calendar section.

1. In the Calls section, choose Section - Show Through.



2. Click the Show into drop-down box and select Calendar.
3. Under From, select Calls.
4. Click Preferences.

   The Calendar Show Through Preferences dialog box appears.
5. For Calendar Preferences, select the appropriate options for how you want your information from Calls to appear in Calendar.
6. Click OK.
7. Click OK.

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

{button ,AL(`H_SHOWING_CALLS_ENTRIES_IN_YOUR_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_INSERTING_A_CALL_STEPS',0)} See related topics

Specifying Calls entry options

Option	Result
Category	Lets you assign one or more categories to a Calls entry.
Status	Lets you assign a status to a Calls entry: Planned, Try Later, Answered, Incoming, Left Message, Calling Back, No Answer, Follow up, and Busy.
Completed	Lets you mark the Calls entry completed.
Confidential	Makes or doesn't make (default) the Calls entry confidential, so others accessing your file can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Overview: Categories

Categories help you manage entries and keep track of related entries across sections. You can assign one or more categories to any Organizer entry. You can then use these categories to view and find entries.

For example, you may want to create a category for all entries that apply to a particular project. You can create the category, and then assign the entries in various sections to the category. This would make it easy to view and work with all appointments, Calls entries, To Do tasks, and other entries that pertained to a project.

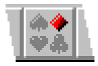
Organizer includes a number of common categories, including Calls, Clients, Expenses, Ideas, and more. You can use these categories and also create or customize your own categories.

{button ,AL(`H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Details: Assigning a category to an entry

Assigning a category to an already created entry in other ways
You can also use a menu command, icon, or function key to assign one or more categories to an entry you select.

To use a menu command, select the entry and, depending on the section you are in, choose one of the following commands: Appointment - Categorize, Task - Categorize, Address - Categorize, Calls - Categorize, Event - Categorize, Page - Categorize, or Anniversary - Categorize. Select the categories for the entry from the list under Categories or enter a new category.

To use an icon, select the entry and click  from the SmartIcons bar or another set of SmartIcons. Select the categories for the entry from the list under Categories or enter a new category.

To use a function key, select the entry and press F5. Select the categories for the entry from the list under Categories or enter a new category.

Creating a new category
If you enter a new category name in the field under new Categories, Organizer creates the category and adds it to the available categories list for the current file. Organizer doesn't automatically associate an icon with a new category you create. To do this, click the Symbol drop down box and choose a symbol from the list to be associated with the new category you created.

Removing a category from an entry
To remove a category from an entry, display the Create or Edit dialog box for the entry. For categories, highlight the category name you assigned in the text box, and press DEL. Press OK to remove the category from the entry.

{button ,AL(`H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS',1)} <u>Go to procedure</u>

Assigning a category to an entry

You can assign a category when you create or edit an entry.

1. Create or edit an entry.

   The Create or Edit dialog box appears.

2. Click the Categories drop-down box and select one or more categories from the list that appears or enter a new category name.
3. Enter any other necessary information for the entry.
4. Click OK.

Tip You can also assign a category to an entry by selecting the entry and displaying the Categorize dialog box. See details.

{button ,AL(`H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS;',0)} See related topics

Details: Creating a new category

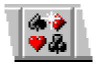
Creating a number of categories at once
For Name, you can enter more than one name if you want to create a number of different categories at one time. Separate the new category names with commas. For example, to enter two new categories named Work and Home, type Work,Home. When you click Add, Organizer creates the new categories as two separate categories.

If you want to associate a single symbol with all the categories you create at one time, click the Symbols drop-down box and select a symbol before you click Add. To associate different symbols with individual categories, click the symbol with each category you assign before you enter a , (comma) or before you click Add.

{button ,AL(`H_CREATING_A_CATEGORY_STEPS',1)} <u>Go to procedure</u>

Creating a new category

1. Choose Create - Categories.



2. For Name, enter a new category name.

   See details

3. (Optional) Click the Symbol drop-down box to select a symbol to associate with the category from the list that appears.
4. Click Add.
5. Click OK.

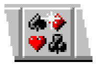
Tip You can also create a category from any Create or Edit dialog box by entering the new name for Categories.

{button ,AL(`H_CREATING_A_CATEGORY_DETAILS',1)} See details

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Deleting a category

1. Choose Create - Categories.



2. In the Categories pull-down menu, select a category.
3. Click Delete.
4. Click Yes when Organizer prompts you whether you want to delete the category.
5. Click Close.

Organizer deletes the category and also removes it from any entries.

Caution You can't undo deleting a category.

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Displaying categories with entries

You use a section's Preferences dialog box to specify that you want to display the category and/or category symbol with entries in that section.

1. Depending on the section you are in, choose View - Calendar Preferences, View - To Do Preferences, View - Address Preferences, View - Calls Preferences, View - Notepad Preferences, or View - Anniversary Preferences.
2. Under Show, select Categories to display the category name with entries.

Note This option is not available in the Address and Planner sections.

3. Under Options, select the category symbol ( ) to display category symbols with entries.

Note This option is not available in the Address and Planner sections.

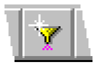
4. Click OK.

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Displaying entries in a particular category

To display entries in a particular category, you must create a filter that specifies the category and the sections you want to affect.

1. Choose Create - Filters.

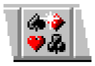


2. Click New.
3. For Name, enter a name for the filter, for example, the name of the category.
4. Click the Section drop-down box and select a section from the list that appears.
5. Click the Field drop-down box and select Categories from the list that appears.
6. Click the Test drop-down box and select Contains from the list that appears.
7. Under Value, enter the name of the category.
8. If you want to use the filter in other sections, click the And/Or drop-down box and select Or.
9. (Optional) If you want to add the filter to the Apply Filter menus, select Show in View - Apply Filter menu.
10. Click OK.
11. Repeat steps 4 through 10 for each section you want to filter.
12. Select the filter you want to apply.
13. Click Apply to apply the filter. If you don't want to apply the filter, click Close.

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_RENAMING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_ABOUT_FILTERS_OVER;H_APPLYING_A_FILTER_STEPS',0)} See related topics

Renaming a category

1. Choose Create - Categories.



2. For Categories, select a category.
3. Click Rename.
4. For New name, enter a new name for the category.
5. Click OK.
6. Click OK.

Organizer also changes the category name for any entries you assigned with that category.

{button ,AL(`H_ABOUT_CATEGORIES_OVER;H_CREATING_A_CATEGORY_STEPS;H_DELETING_A_CATEGORY_STEPS;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS;H_DISPLAYING_CATEGORIES_WITH_ENTRIES_STEPS;H_DISPLAYING_ENTRIES_IN_A_CATEGORY_STEPS',0)} See related topics

Overview: Creating a cost code

A cost code lets you track the costs associated with an entry. For example, you can associate all your meetings with a client with a specific cost per hour.

When you set a cost code, you can export this information along with other information from the entry to another application for analysis. For example, if you set a cost code for all meetings with a client, you could set up a spreadsheet that produces billing for the client or the customer.

You can set cost codes for entries in the following sections: Calendar, To Do, Calls, Planner, and Anniversary.

{button ,AL(`H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Details: Assigning a customer and cost code to an entry

Keyboard shortcuts
You can also use a function key to assign a customer and cost code. Select the entry and press F8.

Assigning a customer and cost code in other ways
You can also use a menu command to assign a customer and cost code.   Select the entry and, depending on the section you are in, choose one of the following commands: Appointment - Cost, Task - Cost, Calls - Cost, Event - Cost, or Anniversary - Cost.

Creating a new customer and/or cost code
If you enter a new customer and/or cost code, Organizer creates the cost code and adds it to the available cost codes list for the current file.

Displaying entries with a particular cost code
To display only entries with a certain cost code, you must create a filter that specifies the cost code and the sections you want to affect.

{button ,AL(`H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',1)} Go to procedure
{button ,AL(`H_CREATING_A_FILTER_STEPS',0)} See related topics

Assigning a customer and cost code to an entry

You can assign a customer and cost code when you create or edit appointments, tasks, calls, events, and anniversaries.

1. Create or edit an entry.

   The Create or Edit dialog box appears.

2. Click Cost.
3. Click the Customer code and Cost code drop-down boxes and select a customer and cost code from the lists that appear or enter a new code.

   See details

4. Click OK.

   You return to the Create or Edit dialog box.

5. Click OK to leave the dialog box.

{button ,AL(`H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_ABOUT_COST_CODES_OVER;H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS;H_MAKING_AN_APPOINTMENT_STEPS;H_INSERTING_A_PLANNER_EVENT_STEPS;H_INSERTING_A_CALL_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_INSERTING_AN_ANNIVERSARY_STEPS',0)} See related topics

Details: Creating a new customer and cost code

Creating a new customer and cost code in other ways

You can also create new customer and cost codes by using the right mouse button to click in the binder area of the Organizer desktop, and then selecting Cost when the menu appears.

{button ,AL(`H_CREATING_A_COST_CODE_STEPS',1)} Go to procedure

Creating a customer and cost code

1. Choose Create - Cost Codes.

2. Under Code, enter a customer code (for example, a client's name).
3. Click Add.
4. Under Cost, enter a billing cost per hour.
5. Click Add.
6. Click OK.

Tip You can enter as many customer codes and cost codes as you want before you click Close.

{button ,AL(`H_CREATING_A_COST_CODE_DETAILS',1)} See details

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Deleting a customer and cost code for an entry

1. Select the entry.
2. Depending on the section you are in, choose Appointment - Cost, Task - Cost, Calls - Cost, Event - Cost, or Anniversary - Cost.
3. Select the Customer code entry and press DEL.
4. Select the Cost code entry and press DEL.
5. Click OK.

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Deleting a customer and cost code

1. Choose Create - Cost Codes.

2. Select the customer code you want to delete from the Customer codes list.
3. Click Delete.
4. Select the cost code you want to delete from the Cost codes list.
5. Click Delete.
6. Click OK.

Caution You can't undo deleting a customer or cost code.

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Displaying customer and cost codes with entries

You use an Organizer section Preferences dialog box to display the customer and cost codes that are connected with entries in that section.

1. Depending on the section you are in, choose View - Calendar Preferences, View - To Do Preferences, View - Calls Preferences, or View - Anniversary Preferences.
2. Under Show, select Cost code.
3. Click OK.

Tip Although you can assign a cost code to a Planner event, you can't display the customer and cost codes in Planner events.

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_CREATING_A_COST_CODE_STEPS;H_RENAMING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;',0)} See related topics

Renaming a customer and cost code

1. Choose Create - Cost Codes.

2. Select the customer code you want to edit from the Customer codes list.
3. Under Code, click anywhere on the name and make your edits.
4. Click Rename.
5. Select the cost code you want to edit from the Cost codes list.
6. Under Cost, click anywhere in the cost and make your edits.
7. Click Rename.
8. Click OK.

{button ,AL(`H_ABOUT_COST_CODES_OVER>OVERVIEW;H_CREATING_A_COST_CODE_STEPS;H_DELETING_A_COST_CODE_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_DELETING_A_COST_CODE_FOR_AN_ENTRY_STEPS;H_DISPLAYING_COST_CODES_WITH_ENTRIES_STEPS',0)} See related topics

Overview: Filters

A filter lets you display a subset of your Organizer entries based on criteria you specify. You create filters based on text, numbers, dates, Organizer attributes (such as category or cost code) or any combination of these. For example, if you want to prepare a mailing list, you can use a filter to display only Address records for New York City; or if you want to create a status report, you can use a filter to display all Calls entries and To Do tasks that occurred before a specified date.

When you create a filter, you enter the section or sections to which you want to apply the filter along with the criteria. Only sections that you refer to in the filter are affected. For example, if you apply a filter for Address records for New York City, all other Organizer sections except Address continue to display all entries.

You can save the filters you create, and also add them to an Organizer menu, so you can quickly switch between a filtered view and a view of all entries.

Organizer works the same way whether you are displaying all entries or a subset of entries. Any operation you can normally do in Organizer you can also do while a filter is in place. When you clear the filter, operations you performed while in the filtered view will also affect the entries that didn't display.

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Details: Applying a filter

Adding a filter to the View menu
To add the name of a filter to the menu, choose Create - Filters, select the filter, click Edit, select Show in View - Apply Filter menu, click OK, and then click Close.

Selecting a filter not in the menu
To display a filter you haven't added to the menu, choose Create - Filters, select the filter, and click Apply.

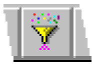
Clearing a filter before selecting another filter
If a filter is already in place when you select a new filter, Organizer clears the currently selected filter and then applies the new filter to all entries.

Adding new entries to a section using a filter
If you add a new entry that doesn't match a filter's criteria while the filter is in place, the new entry will appear in the section. Choose View - Apply Filter and select the filter again to apply the filter to new entries.

{button ,AL(`H_APPLYING_A_FILTER_STEPS',1)} Go to procedure

Applying a filter

1. Choose View - Apply Filter.



2. Choose a filter from the list that appears.

   See details

Tip To see if there is currently a filter in place, choose View. If the Clear Filter command is dimmed, there is no filter in place.

{button ,AL(`H_APPLYING_A_FILTER_DETAILS',1)} See details

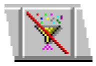
{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Details: Clearing a filter

Clearing a filter in other ways
You can also choose Create - Filters, select (None), and then click Apply to clear a filter.

{button ,AL(`H_CLEARING_A_FILTER_STEPS',1)} Go to procedure

Clearing a filter
To clear a filter, choose View - Clear Filter.



Organizer redisplays all entries in all sections.

{button ,AL(`H_CLEARING_A_FILTER_DETAILS',1)} See details

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Copying a filter

1. Choose Create - Filters.

2. Under Filters, select a filter.
3. Click Copy.
4. For Name, enter a new name for the filter.
5. (Optional) Edit any fields in the copied filter that you want to change.
6. (Optional) Select Show in View - Apply Filter menu if you want Organizer to display this filter when you choose View - Apply Filter.
7. Click OK.
8. If you want to apply the filter now, click Apply. If you don't want to apply the filter, click Close.

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Details: Creating a filter

Moving around filter fields

To move to filter, you can also use , ↓, →,   ←, PGUP, and PGDN to move around the filter table.

To display the options in a drop-down box using the keyboard, move to the drop-down box and press ALT+↓. Then press and ↓ to move through the list. To clear drop-down box options, click ALT+ .

Creating a filter that prompts for text or a value

You can create a filter that displays a dialog box that prompts you for text or a value each time you apply the filter. For example, you might create a filter that prompts for a zip code, and then filters entries based on the zip code you enter.

To create a filter that prompts for a label or value, enter a ? and then the prompt text in the Value field of the filter; for example, ?Zip code.

You can include more than one prompt for a filter. Organizer displays the prompts in the order they appear in the filter table.

Inserting and deleting rows

To insert a row in the filter table, click Insert Row. Organizer adds the row above the current row.

To delete a row, move to any field in the row and click Delete Row.

{button ,AL(`H_CREATING_A_FILTER_STEPS',1)} Go to procedure

Creating a filter

1. Choose Create - Filters.

2. Click New.
3. For Name, enter a name for the filter.
4. Click the Section drop-down box and select the Organizer section for which you want to set a filter.
5. Click the Field drop-down box and select the field against which you want to test.
6. Click the Test drop-down box and select the option for the way you want the filter to evaluate field entries.
7. (Optional) If you are defining a filter based on text or numbers, under value, enter the text or numbers to define what the filter is basing its test on.

   See details
8. (Optional) If you are going to add other criteria for the filter, click the And/Or drop-down box and select an option.
9. (Optional) If you want the name of the filter to appear in the View - Apply Filter menu, select the Show in View - Apply Filter menu option.
10. Click OK.
11. (Optional) To enter additional filter criteria, move to the next row and repeat steps 4 through 10.
12. Select the filter you want to apply.
13. Click Apply, to apply the filter. If you don't want to apply the filter, click Close.

{button ,AL(`H_CREATING_A_FILTER_DETAILS',1)} See details

{button ,AL(`H_ABOUT_FILTERS_OVER;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Removing a filter

1. Choose Create - Filters.

2. Under Filters, select a filter.
3. Click Remove.
4. Click Yes when Organizer asks whether you want to delete the filter.
5. Click Close.

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_EDITING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;',0)} See related topics

Details: Editing a filter

Moving around in filter fields

In addition to using your mouse, you can also use , ↓, →, ←, PGUP, and PGDN to move around the filter table.

To display the options in a drop-down box using the keyboard, move to a drop-down box and press ALT+↓. Then press or ↓ to move through the list. To clear drop-down box options, click ALT+ .

Inserting and deleting rows

To insert a row in the filter table, click Insert Row. Organizer adds the row above the current row.

To delete a row, move to any field in the row and click Delete Row.

{button ,AL(`H_EDITING_A_FILTER_STEPS',1)} Go to procedure

Editing a filter

1. Choose Create - Filters.

2. Under Filters, select a filter.
3. Click Edit.
4. Edit the filter.

   See details
5. (Optional) Select Show in View - Apply Filter menu if you want Organizer to display the filter when you choose View - Apply Filter.
6. Click OK.
7. If you want to apply the filter now, click Apply. If you don't want to apply the filter, click Close.

{button ,AL(`H_EDITING_A_FILTER_DETAILS',1)} See details

{button ,AL(`H_ABOUT_FILTERS_OVER;H_CREATING_A_FILTER_STEPS;H_COPYING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;H_CLEARING_A_FILTER_STEPS;H_DELETING_A_FILTER_STEPS',0)} See related topics

Setting an Address filter

Field	Result
Categories	Displays Address records in the category you enter under Value, according to the criteria you select under Test.
Business Assistant, Business City, Business Company, Business Country, Business E-Mail, Business Ext, Business Fax, Business Job Title, Business Notes, Business State, Business Street, Business Tel 1, Business Tel 2, Business Zip, Children, City, Country, E-Mail, Fax, First name, Last name, Notes, Spouse, State, Street, Tel1, Tel2, Title, Zip, Unused1, Unused2	Display Address records in which the text or numbers in the field you select match the text or numbers you enter under Value, according to the criteria you select under Test.
[any field]	Displays Address records, any field of which matches the text or numbers you enter under Value, according to the criteria you select under Test.

Setting an Anniversary filter

Field	Result
Categories	Displays anniversaries in the category you enter under Value, according to the criteria you select under Test.
Confidential	Displays anniversaries that are or aren't set as confidential.
Cost Code	Displays anniversaries that use the cost code you enter under Value, according to the criteria you select under Test.
Customer Code	Displays anniversaries that use the customer code you enter under Value, according to the criteria you select under Test.
Description	Displays anniversaries whose description contains the text or numbers you enter under Value, according to the criteria you select under Test.
Repeated Yearly	Displays anniversaries that are or aren't set to occur on the same date every year.
Start Date	Displays anniversaries with the start date you enter under Value, according to the criteria you select under Test.
Zodiac Sign	Displays anniversaries based on the zodiac sign you enter under Value, according to the criteria you select under Test.
[any field]	Displays anniversaries, any field of which matches the text or numbers you enter under Value, according to the criteria you select under Test.

Setting a Calendar filter

Field	Result
Categories	Displays appointments in the category you enter under Value, according to the criteria you select under Test.
Confidential	Displays appointments that are or aren't set as confidential.
Cost Code	Displays appointments that use the cost code you enter under Value, according to the criteria you select under Test.
Customer Code	Displays appointments that use the customer code you enter under Value, according to the criteria you select under Test.
Description	Displays appointments whose description contains the text or numbers you enter under Value, according to the criteria you select under Test.
End Date Time	Displays appointments based on the end date or time you enter under Value, according to the criteria you select under Test.
Penciled In?	Displays appointments that are or aren't penciled in.
Start Date Time	Displays appointments based on the start date or time you enter under Value, according to the criteria you select under Test.
[any field]	Displays appointments, any field of which matches the text or numbers you enter under Value, according to the criteria you select under Test.

Setting a Calls filter

Field	Result
Area Code	Displays Calls entries in which the number in the Area Code field match the number you enter under Value, according to the criteria you select under Test.
Categories	Displays Calls entries in the category you enter under Value, according to the criteria you select under Test.
Company	Displays Calls entries in which the text or numbers in the Company field match the text or numbers you enter under Value, according to the criteria you select under Test.
Completed	Displays Calls entries that are or aren't marked completed.
Confidential	Displays Calls entries that are or aren't set as confidential.
Cost Code	Displays Calls entries that use the cost code you enter under Value, according to the criteria you select under Test.
Country Code	Displays Calls entries in which the number in the Country Code field match the number you enter under Value, according to the criteria you select under Test.
Customer Code	Displays Calls entries that use the customer code you enter under Value, according to the criteria you select under Test.
Description	Displays Calls entries whose description contains the text or numbers you enter under Value, according to the criteria you select under Test.
End Date Time	Displays Calls entries based on the end date or time you enter under Value, according to the criteria you select under Test.
First Name	Displays Calls entries in which the text or numbers in the First Name field match the text or numbers you enter under Value, according to the criteria you select under Test.
Last Name	Displays Calls entries in which the text or numbers in the Last Name field match the text or numbers you enter under Value, according to the criteria you select under Test.
Start Date Time	Displays Calls entries based on the start date or time you enter under Value, according to the criteria you select under Test.
Status	Displays Calls entries with the status you enter under Value, according to the criteria you select under Test.
Telephone Number	Displays Calls entries in which the text or numbers in the Telephone Number field match the text or numbers you enter under Value, according to the criteria you select under Test.
Use Country And Area Code	Displays Calls entries that are or aren't set to use the country and area code.
[any field]	Displays Calls entries, any field of which matches the text or numbers you enter under Value, according to the criteria you select under Test.

Setting a Notepad filter

Field	Result
Categories	Displays pages in the category you enter under Value, according to the criteria you select under Test.
Confidential	Displays pages that are or aren't set as confidential.
Creation Date Time	Displays pages based on the creation date or time you enter under Value, according to the criteria you select under Test.
Notes	Displays pages that contain the text or numbers you enter under Value, according to the criteria you select under Test.
Page Number	Displays pages based on the page number you enter under Value, according to the criteria you select under Test.
Title	Displays pages whose title contains the text you enter under Value, according to the criteria you select under Test.
[any field]	Displays pages, any field of which matches the text or numbers you enter under Value, according to the criteria you select under Test.

Setting a Planner filter

Field	Result
Categories	Displays Planner events in the category you enter under Value, according to the criteria you select under Test.
Confidential	Displays Planner events that are or aren't set as confidential.
Cost Code	Displays Planner events that use the cost code you enter under Value, according to the criteria you select under Test.
Customer Code	Displays Planner events that use the customer code you enter under Value, according to the criteria you select under Test.
Description	Displays Planner events whose description contains the text or numbers you enter under Value, according to the criteria you select under Test.
From Date	Displays Planner events based on the date you enter under Value, according to the criteria you select under Test.
KeyID	Displays Planner events whose event type contains the text or numbers you enter under Value, according to the criteria you select under Test.
Until Date	Displays Planner events based on the until date you enter under Value, according to the criteria you select under Test.
[any field]	Displays Planner events, any field of which matches the text or numbers you enter under Value, according to the criteria you select under Test.

Setting a To Do filter

Field	Result
Categories	Displays To Do tasks in the category you enter under Value, according to the criteria you select under Test.
Completion Date	Displays To Do tasks based on the completion date you enter under Value, according to the criteria you select under Test.
Confidential	Displays To Do tasks that are or aren't set as confidential.
Cost Code	Displays To Do tasks that use the cost code you enter under Value, according to the criteria you select under Test.
Customer Code	Displays To Do tasks that use the customer code you enter under Value, according to the criteria you select under Test.
Description	Displays To Do tasks whose description contains the text or numbers you enter under Value, according to the criteria you select under Test.
Due Date	Displays To Do tasks based on the until date you enter under Value, according to the criteria you select under Test.
Priority	Displays To Do tasks with the priority you enter under Value, according to the criteria you select under Test.
Start Date	Displays To Do tasks based on the start date you enter under Value, according to the criteria you select under Test.
Status	Displays To Do tasks with the status you enter under Value, according to the criteria you select under Test.
[any field]	Displays To Do tasks, any field of which matches the text or numbers you enter under Value, according to the criteria you select under Test.

Setting filter fields

The fields that you can use for a filter depend on the section you selected in the Section drop-down box. Select a topic below for more information on each section's filter fields.

- Setting an Address filter
- Setting an Anniversary filter
- Setting a Calendar filter
- Setting a Calls filter
- Setting a Notepad filter
- Setting a Planner filter
- Setting a To Do filter

Setting test options

Field	Result
Begins With	Displays all entries that begin with the text you enter under Value.
Contains	Displays all entries that exactly match the text you enter under Value.
Doesn't Begin With	Displays all entries that don't begin with the text you enter under Value.
Doesn't Contain	Displays all entries that don't include the text you enter under Value.
Doesn't End With	Displays all entries that don't end with the text you enter under Value.
Ends With	Displays all entries that end with the text you enter under Value.
Equals	Displays all entries that are exactly equal to the text or numbers you enter under Value.
Not equals	Displays all entries that do not match the text or numbers you enter under Value.

Setting the And/Or option

Option	Result
And	Indicates that you are entering another filter criteria within the same section (for example, a filter based on both a start date and category for Calendar appointments).
Or	Indicates that you are entering a filter criteria in another section (for example, a filter based on a start date in the Calls section and To Do section).

Keyboard shortcuts

You can use the following keyboard shortcuts for Organizer functions and commands:

Action	Shortcut
Archive a file.	Press CTRL+A
Display a Business tab for a selected address.	Press CTRL+B
Copy selected text, or a Notepad bitmap or metafile to Clipboard from the editing area.	Press CTRL+INS or CTRL+C
Dial a phone number.	Press CTRL+D
Edit the selected entry.	Press CTRL+E
Find text.	Press CTRL+F
Turn to specified information.	Press CTRL+G
Display a Home tab for a selected address.	Press CTRL+H
Import information.	Press CTRL+I
Create an Organizer link.	Press CTRL+L
Merge a file.	Press CTRL+M
Create a new file.	Press CTRL+N
Open a file.	Press CTRL+O
Print information.	Press CTRL+P
Dial the phone number of the selected entry.	Press CTRL+Q
Save a file.	Press CTRL+S
Go to today's date in Calendar.	Press CTRL+T
Set access rights (and passwords) for a file.	Press CTRL+U
Paste information from Clipboard.	Press SHIFT+INS or CTRL+V

Cut selected text to Clipboard.	Press CTRL+X or SHIFT+DEL
Edit print layouts.	Press CTRL+Y
Undo your last action.	Press CTRL+Z
Save a file to another name or a different drive and directory.	Press CTRL+SHIFT+A
Retrieve the last deleted entry from Trash.	Press ALT+BACKSPACE or CTRL+Z
Display context-sensitive Help.	Press F1
Toggle Bubble Help on or off.	Press CTRL+F1
Confirm the current edits in a dialog box.	Press F2
Search for text.	Press F3
Turn on or off confidentiality for the current entry.	Press F4
Assign one or more categories for the current entry.	Press F5
Set an alarm for the current entry.	Press F6
Specify that the current entry be a repeating entry.	Press F7
Assign a cost code to the current entry.	Press F8
Update all entries in an Organizer file (for example, if you are working in a file concurrently with other users); also checks for unread mail.	Press F9
Turn Clean Screen on or off.	Press F11
Create a new entry.	Press INS
Clear selected text or entries.	Press DEL

Close a dialog box; cancel the current operation.	Press ESC
Also, when performing on-page edits on an entry, cancel the current edits.	
Go to the previous page or, in the pop-up calendar, go back one month.	Press PGUP
Go to the previous section or, in the pop-up calendar, go to the previous year.	Press CTRL+PGUP
Go to the next page or, in the pop-up calendar, go forward one month.	Press PGDN
Go to the next section or, in the pop-up calendar, go to the next year.	Press CTRL+PGDN
Turn back to previous page.	Press CTRL+BACKSPACE
In a dialog box, display options for the current drop-down box.	Press ALT+↓
In a dialog box, clear drop-down box options.	Press ALT+
Fold a page.	Press ALT+ ←
Unfold a page.	Press ALT+ →
Go to the last item currently displayed on the screen.	Press END
Go to the last item in the current section.	Press CTRL+END
Go to the first item currently displayed on the screen or, in the pop-up calendar, go to today's date.	Press HOME
Go to the first item in the current section.	Press CTRL+HOME

Mouse shortcuts

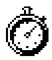
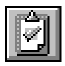
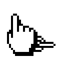
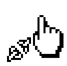
You can use the following mouse shortcuts for Organizer functions and commands:

Action	Shortcut
Select an entry.	Click the entry.
Edit an entry.	Double-click the entry.
Create an entry.	Double-click the section page. You can also create an entry by clicking the section page or section tab with the right mouse button and choosing Create from the menu that appears.
Change preferences for a section.	Click the section tab with the right mouse button and choose the Preferences item from the menu that appears.
Change the view or sort order for a section.	Click the section page with the right mouse button and choose a view or sort order from the menu that appears.
Move an entry.	Drag and drop the entry.
Copy an entry.	Press and hold CTRL while you drag and drop the entry.
Create an entry and automatically link it to an existing entry.	Press and hold SHIFT while you drag and drop the existing entry to the section tab for the new entry. The Create dialog box for the section appears with a link already set to the existing entry.
Turn back a page.	Click left page turner.
Turn forward a page.	Click right page turner.
Turn to the back cover of the notebook.	Click the back cover (right edge) of the notebook.
Turn to the front cover of the notebook.	Click the front cover (left edge) of the notebook.
Turn to the front of a section.	Click the section tab.
Turn to the back of a	Press and hold SHIFT while you

section.	click the section tab.
Go to today's date in Calendar section.	Click today's date in Toolbox.
Add, rename, remove, include, or change the pictures for a section.	Click any section tab with the right mouse button and choose an item from the menu that appears.
Change User Setup, Passwords, Filters, Categories, Cost Codes, Customize, SmartIcons, Show Through or Clean Screen options.	Click the right edge or left edge of the notebook with the right mouse button and choose an item from the menu that appears.
Go back to the last page you were on.	Press and hold CTRL while you click the section tab.
In a text editing area, insert the current time.	Press and hold SHIFT while you click the clock.
In a text editing area, insert the current date.	Press and hold SHIFT while you click today's date.

Organizer mouse pointer shapes

While you are using Organizer, the mouse pointer can assume the following shapes:

Mouse pointer shapes	Action
	Shows mouse location.
	Selects, drags, or drops an entry. You click the Pointer icon from Toolbox.
 or 	Turns a page.
	Indicates that you can edit text or numbers.
	Indicates that you must wait while Organizer performs a function.
 or 	Indicates that you can create, move, copy, or delete an appointment.
 or 	Indicates that you can create, move, copy, or delete a To Do task.
 or 	Indicates that you can create, move, copy, or delete an Address record.
 or 	Indicates that you can create, move, copy, or delete a Calls entry.
 or 	Indicates that you can create, move, copy, or delete a Planner event.
 or 	Indicates that you can create, move, copy, or delete a Notepad page.
 or 	Indicates that you can create, move, copy, or delete an anniversary.
	Indicates that you can pick up an entry. You click the Pick up icon from Toolbox.
	Indicates that you can link the current entry. You click the Link icon from Toolbox.
	Indicates that you are linking an entry.
	Indicates that you can break a link. You click the Broken link icon from Toolbox.

Editing keys

You can use the following keys to move the I-beam ( ) or the insertion point (|), in text boxes and other areas in which you can edit, such as Notepad text pages:

To move the insertion point	**Press**
Up or down one line	or ↓
Right or left one character	→ or ←
Right or left one word	CTRL+ ← or CTRL+ →
To the beginning or end of the line	HOME or END
Up or down one screen	PGUP or PGDN
To the beginning or end of the text block	CTRL+HOME or CTRL+END

Shortcut menus

You can click the right mouse button to display shortcut menus for Organizer functions. If you click the right mouse button in a blank area of any Organizer page, you can perform the following functions. Remember, the commands on the menu may vary, depending on the section you're in.

To	Choose
Create an entry in the current section.	Create Appointment, Task, Address, Call, Event, Page, or Anniversary.
Change the view for the current section.	For Calendar: Day per Page, Work Week, Week per Page, Month; For To Do: By Priority, By Status, By Start Date, By Category; For Address: All, Address, Contact, Phone, By Last Name, By Company, By Zip, Category; For Calls: By Person, By Company, By Date, By Category; For Planner: Quarter per Page, Year per Page; For Notepad: By Page Number, By Title, By Date, By Category; For Anniversary: By Month, By Year, By Zodiac, By Category.
Select preferences for the current section.	Calendar Preferences, To Do Preferences, Address Preferences, Calls Preferences, Planner Preferences, Notepad Preferences, Anniversary Preferences.

If you click the right mouse button while your mouse pointer is on a section divider, you can perform the following functions:

To	Choose
Create an entry in the current section.	Create Appointment, Create Task, Create Address, Create Call, Create Event, Create Page, Create Anniversary.
Add a new section.	Add
Rename the current section.	Rename
Remove a section.	Remove
Include a section from another Organizer file to the current Organizer file.	Include
Add a picture to the current section tab.	Picture
Select preferences for the current section.	Calendar Preferences, To Do Preferences, Address

	Preferences, Call Preferences, Planner Preferences, Notepad Preferences, Anniversary Preferences.

If you click the right mouse button while your mouse pointer is on an entry, you can perform the following functions:

To	Do this
Cut the entry to Clipboard.	Cut
Copy the entry to Clipboard.	Copy
Paste Cipboard contents to a specified location.	Paste
Delete the entry.	Clear
Make changes to the entry.	Edit Appointment, Edit Task, Edit Address, Edit Call, Edit Event, Edit Page, Edit Anniversary.
Add, delete, or change the category for the entry.	Categorize
Set an alarm for the entry.	Alarm
Set an entry to repeat.	Repeat
Set a cost code entry.	Cost
Determine if the entry conflicts with a previously scheduled entry.	Warn Of Conflicts
Pencil in the selected entry.	Pencil In
Mark the entry as confidential.	Confidential

Overview: Notepad section

The Notepad section acts like an ordinary paper notepad; however, this electronic notepad helps you quickly organize the following kinds of information:

- Notes
- Lists
- Memos
- Spreadsheets
- Sales charts
- Diagrams
- Organizational charts
- Maps
- Logos

You can also do the following activities:

- Customize your document with rich text formatting, like bold, italic, different fonts and font sizes, and so on
- Add bitmaps, metafiles, and graphics
- Created embedded and linked OLE objects

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS;H_DELETING_A_NOTEPAD_PAGE_STEPS;H_EDITING_A_NOTEPAD_PAGE_STEPS;H_INSERTING_A_NOTEPAD_PAGE_STEPS;',0)} See related topics

Details: Changing preferences in Notepad

Changing your Notepad preferences
You can change any Notepad preferences as frequently as you want.

Sorting Notepad pages
You can change any Notepad preferences so that your Notepad information appears and functions the way you want. For example, let's say every Thursday you attend a marketing meeting during which you must summarize your accomplishments. To group together your accomplishments for the marketing meeting, you can sort your entries by category. Organizer will group together all similarly categorized entries.

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS',1)} Go to procedure

Changing preferences in Notepad

Notepad preferences determine how your entries appear and what information appears with them. Changing preferences is optional; if you don't change your Notepad preferences, Organizer uses the default preferences.

1. Go to the Notepad section and choose View - Notepad Preferences.
   See details
2. Under View, select the appropriate options for how you want to sort Notepad pages.
3. Under Show, select the appropriate options for what information you want to appear on your Notepad entries.
4. Under Options, select the appropriate options.
5. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_TURNING_TO_A_PAGE_IN_NOTEPAD_STEPS;H_MOVING_A_NOTEPAD_PAGE_STEPS;H_SORTING_NOTEPAD_PAGES_STEPS;H_CREATING_CHAPTERS_STEPS;',0)} See related topics

Details: Creating chapters

Starting a chapter
You can start or create chapters in your Notepad section. The Start a chapter option assigns a new chapter to a Notepad page.

For example, let's say you are coordinating an upcoming event for the marketing group. To keep together ideas and information about the event, create a page, and select Start a chapter to mark that page as the beginning of your Event Materials chapter. The page title will appear in bold on the Notepad Contents, with any pages you create listed beneath it.

When you want to create pages that aren't related to the Event Materials chapter, just create a new page with an appropriate title, and select Start a chapter to begin a different chapter. If you create pages that you later want to add to, or remove from, any chapter you've all ready created, just go to the Notepad Contents page, and drag and drop the page to the new location.

Tip Renumber your pages manually to change the order in which they appear in your Notepad section. For example, let's say you want page 8 to become page 3. From the Edit Page dialog box under Page number, type the number 3 in the Manual text box and click OK.

{button ,AL(`H_CREATING_CHAPTERS_STEPS',1)} Go to procedure

Creating chapters

You can create chapters within your Notepad section. Creating chapters is a useful way to group related information.

1. Create or edit a Notepad page.
2. Under Style, select Start a chapter.

   See details
3. Click OK.

Note Chapter pages appear in bold text on the Notepad Contents page.

{button ,AL(`H_CREATING_CHAPTERS_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_TURNING_TO_A_PAGE_IN_NOTEPAD_STEPS;H_MOVING_A_NOTEPAD_PAGE_STEPS;H_SORTING_NOTEPAD_PAGES_STEPS;',0)} See related topics

Customizing the appearance and function of your Notepad section

Option	Result
Start chapters	Places your Notepad page headings on the next page (default), on the left page, or on the right page.
Table of contents	Provides a Notepad Contents page in any of the following formats: Full (default), None, Chapters only, Pages only.
Page numbering	Numbers pages as 1, 2, 3 (default); or as 1-1, 1-2, 1-3, and so on.
Show	Shows or doesn't show (default) a symbol indicating that you protected or assigned a category to your entry.
Turn to entry after Create/Edit	Goes (default) or doesn't go to where your Notepad information appears after you entered or edited the entry.

Note Under Options, you can select the following symbols to show information about Notepad page entries. Except for , these symbols appear with Notepad page entries, when appropriate.

Symbol	Result
	Indicates that an entry is confidential.
	Indicates that a category symbol appears with the Notepad entry. The symbol for the category you have specified appears with each entry.

Selecting the sort order of Notepad entries

Option	Result
Page number	Sorts (default) your Notepad pages numerically by page number.
Title	Sorts your Notepad pages alphabetically by page title, for example, fiscal budget, marketing expenses, research projects, and so on.
Date	Sorts your Notepad pages chronologically according to the date they were entered.
Category	Sorts your Notepad pages alphabetically by category, for example, business, finance, and so on.

Selecting what you see with your Notepad entries

Show options let you see a variety of information associated with each Notepad entry.

Option	Result
Title	Shows (default) or doesn't show the title of each page, for example, fiscal budget, marketing expenses, and so on.
Categories	Shows (default) or doesn't show the categories associated with each page entry, for example, business, finance, and so on.

Sorting Notepad pages

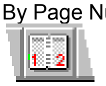
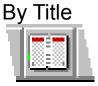
You must assign categories to your Notepad pages before you sort your Notepad pages by category.

1. Go to the Notepad section.
2. Choose View.
3. Choose one of the following commands: By Page Number, By Title, By Date, or By Category.

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_CREATING_CHAPTERS_STEPS',0)} See related topics

Sorting your Notepad pages

The Sort icons appear in Toolbox. You can click one instead of choosing the command.

Command	Result
By Page Number 	Sorts your Notepad pages numerically by page number (default).
By Title 	Sorts your Notepad pages alphabetically by page title, for example, fiscal budget, marketing expenses, research projects, and so on.
By Date 	Sorts your Notepad pages chronologically according to the date they were entered.
By Category 	Sorts your Notepad pages alphabetically by category, for example, finance, marketing, research projects, and so on.

Details: Turning to a page in Notepad

Turning to a Notepad page in other ways

You can also click  on any Notepad page to turn a Notepad page.

{button ,AL(`H_TURNING_TO_A_PAGE_IN_NOTEPAD_STEPS',1)} Go to procedure

Turning to a page in Notepad

1. Go to the Notepad section.
2. On Notepad Contents, double-click the page you want to go to.

{button ,AL(`H_TURNING_TO_A_PAGE_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_SORTING_NOTEPAD_PAGES_STEPS;H_CREATING_CHAPTERS_STEPS',0)} See related topics

Overview: Planner section

Planner helps you schedule and prepare for events that take place all day or for more than one day. With Planner you can do the following activities:

- Designate blocks of time for a particular activity, such as a vacation, an off-site meeting, or a conference.
- View events by year or by quarter.
- Specify that your events show through into the Calendar section, so you can see your upcoming commitments in the context of your daily work.
- Show through Planner events in the calendar section, and show through Calendar appointments in the Planner section.

Planner looks like a wall chart where you can mark events, tasks, or milestones with color blocks or strips. The months of the year are on the left, the days of the week are across the top, and the years are on the right side. If you want to look at the Planner schedule for a different year, click that year tab.

At the bottom of the page, Planner provides a color key with event types, for example, Vacation, Meeting, or Trade Show. You can customize the Planner key descriptions by changing the words to suit your needs.

When you move the mouse pointer in Planner, the date your pointer is on appears in the box just below the Planner chart in the long rectangular box. If you created an event, the event type and the first line of notes text appears with the date.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPSH_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS',0)} See related topics

Details: Changing preferences in Planner

Editing the Planner key in other ways
You can also edit the Planner key by double-clicking anywhere in the Planner key.

Folding or unfolding the Planner page

If you unfold or fold the Planner wall chart by clicking the unfold  or fold  icons, only a portion of the Planner wall chart appears on a single page. You can also choose View - Fold Out to unfold the page.

Changing your Planner preferences
You can change any Planner preferences so that your Planner information appears and functions the way you want. You can also change Planner preferences as frequently as you want.

Planner uses page tabs to group information within the section. The tabs you see depend on the view you choose.

If you select Quarter per Page, Organizer displays tabs with quarter names, for example Q1 1995, and also includes tabs for the previous and next year. If you select Year per Page, Organizer displays year tabs and also includes tabs for the previous and next decade.

{button ,AL(`H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',1)} Go to procedure

Changing preferences in Planner

Planner preferences determine how your events appear and what information appears with them. Changing preferences is optional; if you don't change your Planner preferences, Organizer uses the default preferences.

1. Go to the Planner section and choose View - Planner Preferences.
2. Under View, select the option for what you want to appear with your Planner events.
3. Under Options, select the appropriate options you want to appear with your Planner events.
4. (Optional) If you want to edit the Planner key, click Key.
5. Select a Planner Key to change, enter the changes you want to make, and click OK.
   See details
6. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_PLANNER_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;',0)} See related topics

Changing the view of Planner events

1. Go to the Planner section.
2. Choose View.
3. Choose the Quarter per Page or Year per Page command.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Customizing the appearance of your Planner section

Option	Result
Days start at	Lets you specify the time at which days in Planner begin (for when you are showing through Calendar entries). The default is 8:00 AM.
Days end at	Lets you specify the time at which days in Planner end (for when you are showing through Calendar entries). The default is 6:00 PM.
Show key	Shows (default) or doesn't show the Planner key at the bottom of the Planner wall chart.
Automatically unfold	Shows (default) or doesn't show Planner unfolded over two pages.
Turn to entry after Create/Edit	Goes (default) or doesn't go to the page your event is on after you create or edit an event.

Details: Deleting a Planner event

Keyboard shortcuts
You can also select an event and then press CTRL+X or DEL to delete a Planner event.

Deleting a Planner event in other ways
You can also delete a Planner event by selecting the event and pressing DEL.

{button ,AL(`H_DELETING_A_PLANNER_EVENT_STEPS',1)} Go to procedure
{button ,AL(`;H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS',0)} See related topics

Deleting a Planner event

1. Select the Planner event you want to delete.
2. Drag and drop the event to

 in Toolbox.

Note To retrieve a deleted Planner event, choose Edit - Undo Event Delete before you do any other action. You can only undo the last action.

{button ,AL(`H_DELETING_A_PLANNER_EVENT_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Details: Editing a Planner event

Keyboard shortcuts
You can also select a Planner event and then press CTRL+E to edit the event.

Editing a Planner event in other ways
You can also use the mouse to directly edit Planner events. To move the event to a different time period, you can drag and drop the event to the new time. To edit the start time, end time, or duration of the event, you can click and hold either end of the event and move the mouse pointers to adjust the event.

Changing the event type
Click the Event type drop-down box to select an event type from the list that appears.

To change the event types in the Planner key, choose View - Planner Preferences and click Key.   In the Planner Key dialog box, click the text in the Planner Key event type you want to change and edit it.

Changing the row number
You can create more than one event on a given day.   Planner days are divided into 4 rows in the Year per Page view and 8 rows in the Quarter per Page view. You can change the row in which you want the event to appear by entering a row number or clicking + (plus) to increase, or - (minus) to decrease the row number. For example, if you want a Planner event to appear in row 2, enter 2 for Row.

All rows of an event you create in a Quarter per Page view display in Year per Page. However, Organizer combines two rows of the Quarter per Page view to a single row in the Year per Page view.

If you plot Planner events on top of each other or create more events than Planner has rows to display, Planner displays crosshatching to indicate that there's a Planner event you can't see. You can drag the Planner event that's on top to a different row so the events underneath partially show.

Changing the start date, end date, and duration of an event
Click the From or Until drop-down boxes to change the start or end date of an event. You can also click the Days + (plus) and - (minus) to adjust the duration of an event.

Changing the Category
Click the Categories drop-down box and select the categories from the list that appears.

Changing the confidentiality
Select Confidential. If this option is checked, Organizer makes the event confidential, so others who have access to your files cannot view it.

{button ,AL(`H_EDITING_A_PLANNER_EVENT_STEPS',1)} Go to procedure

{button ,AL(`;H_EDITING_THE_PLANNER_KEY_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',0)} See related topics

Editing a Planner event

1. Double-click the Planner event.
2. Edit the Planner event.

   See details

Tip Press TAB to move between options in an Edit Planner dialog box.

3. Click OK to enter your changes.

{button ,AL(`H_EDITING_A_PLANNER_EVENT_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Details: Editing the Planner key names

Editing the Planner key names in other ways
You can also double-click on the Planner key that you wish to edit. This will bring up the Planner Key dialog box.

Reviewing the number of days for each event type
You can move the mouse pointer over an event type in the Planner key and Organizer displays the number of days you committed to that activity for the current year or quarter (depending on the view option you selected) in the box that appears above the Planner key.

{button ,AL(`H_EDITING_THE_PLANNER_KEY_STEPS',1)} Go to procedure

Editing the Planner key names

1. Select View - Planner Preferences.
2. Click Key.
3. Click or highlight the text in any of the Planner keys and enter the changes you want to make to the Planner key name.
4. Click OK.

{button ,AL(`H_EDITING_THE_PLANNER_KEY_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Details: Creating a Planner event

Keyboard shortcuts
You can also create an event by choosing Create - Event or pressing INS when you are in the Planner section.

Creating a Planner event in other ways
The quickest way to create a Planner event is to use the mouse. Select the type of event you want to work with from the key at the bottom of the Planner page. When you move the mouse pointer over the planner, it turns into a marker. Click and hold the mouse on the first day of the event and drag it to indicate the duration of the event. When you release the mouse, Organizer creates the event.

Understanding Planner rows
You can create more than one event on a given day. Planner days are divided into 4 rows in the Year per Page view and 8 rows in the Quarter per Page view. You can change the row in which you want the event to appear, enter a row number or click + (plus) to increase, or - (minus) to decrease the row number. For example, if you want a Planner event to appear in row 2, enter 2 for Row.

All rows of an event you create in the Quarter per Page view appear in the Year per Page view. However, Organizer combines two rows of the Quarter per Page view to a single row in the Year per Page view.

If you plot Planner events on top of each other or create more events than Planner has rows to display, Planner displays crosshatching to indicate that there's a Planner event you can't see. You can drag the Planner event that's on top to a different row so the events underneath partially show.

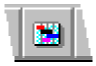
Selecting the duration of your event
You can enter an end date to any event and Organizer will automatically adjust the number of days for the event. If you enter a specific number of days, Organizer automatically adjusts the end date.

Reviewing the number of days for each event type
You can move the mouse pointer over an event type in the Planner key and Organizer displays the number of days you committed to that activity for the current year in the box that appears above the Planner key.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS',1)} Go to procedure
{button ,AL(`;H_EDITING_THE_PLANNER_KEY_STEPS',0)} See related topics

Creating a Planner event

1. Go to the Planner section and double-click the Planner page.



2. Click the Event type drop-down box to select an event type from the list that appears.

   See details

3. (Optional) Click the Row + (plus) to increase or - (minus) to decrease the row in the Planner day in which you want the event to appear.

   See details

4. (Optional) Under Notes, enter additional information about the event.
5. Click the From and Until drop-down boxes to select the start date and end date of the event. (You can also click the Days + (plus) to increase, and - (minus) to decrease the duration of the event.)

   See details

6. (Optional) Select the appropriate options for the event: Categories, Confidential.
7. Click OK.

Tip To create additional Planner events, click Add before you click OK. When you finish entering all your Planner events, click OK.

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_DETAILS',1)} See details

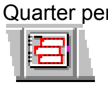
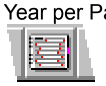
{button ,AL(`H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_SHOWING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',0)} See related topics

Selecting Planner event options

Option	Result
Categories	Lets you establish one or more categories for the event.
Confidential	Makes or doesn't make (default) the event confidential, so others who have access to your files cannot view it. If you assigned a pasword to your file, only the Owner can see and change entries that are confidential.

Selecting the Planner view

The view icons below appear in Toolbox.   Click one instead of using the command.

Command	Result
Quarter per Page 	Displays three months at a time.
Year per Page 	Displays a year at a time (default).

Details: Showing Planner events in Calendar

Editing a Planner event in Calendar
If you want to edit a Planner event and you are in the Calendar section, double-click the Planner event. The Edit Event dialog box appears. Make your changes and click OK.

Rescheduling a Planner event in Calendar
If you want to reschedule a Planner event and you are in the Calendar section, you can drag and drop the Planner event to a different day on any of the days that appear on your current pages. If you want to reschedule a Planner event to a day on another page, click  in Toolbox, select the Planner event, go to the day you want, and click.

Showing entries while displaying time slots in day per page view
If you are using the Day per Page view, the display of show-through entries is static when you're displaying time slots. The show-through entries do not scroll out of view as you scroll through the day's appointments; that is, the show-through entries stay either above or below the time slots.

To show through entries, Organizer blocks out an area at the top or bottom of your appointments. You can expand or shrink this block by dragging the solid box in the bottom-right corner. The new size of this area affects all pages in the Day per Page view.

Alternatively, you can drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

- New Size to use the size you dragged for all pages.
- Temporary Size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16, the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

{button ,AL(`H_SHOWING_PLANNER_EVENTS_IN_CALENDAR_STEPS',1)} Go to procedure

Showing Planner events in Calendar

1. Choose Section - Show Through.
2. Click the Show into drop-down box to select Calendar as the section to show into.
3. Under From, select Planner.
4. (Optional) Click Preferences and select options for whether Planner events appear above or below appointments and how much of the event's description to show in Calendar.
5. Click OK after you select an option.
6. Click OK.

{button ,AL(`H_SHOWING_PLANNER_EVENTS_IN_CALENDAR_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_PLANNER_EVENT_STEPS;H_EDITING_A_PLANNER_EVENT_STEPS;H_DELETING_A_PLANNER_EVENT_STEPS;H_CHANGING_THE_VIEW_OF_PLANNER_EVENTS_STEPS;H_EDITING_THE_PLANNER_KEY_STEPS;H_BOOKING_PLANNER_EVENTS_IN_YOUR_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS',0)} See related topics

Overview: SmartIcons

SmartIcons automate Organizer menu commands and provide shortcuts for other functions. To use SmartIcons, position your mouse pointer on the icon and click the left mouse button. To find out the function of an icon, move the mouse pointer to the icon. Bubble Help for the icon appears. (To turn Bubble Help off or on, choose Help - Bubble Help.)

When you first start Organizer, certain SmartIcons appear across the top of the screen. You can customize the set of SmartIcons by adding the ones you use most often and removing the ones you don't use. You can also change the position of the Smarticons so they appear across the bottom of the screen, to either side, or float around your screen when you move them with the mouse.

Organizer has Toolbox icons that appear on the left side of the screen. Toolbox icons provide extra tools for performing and automating Organizer specific tasks.

{button ,AL(`H_ADDING_AN_ICON_TO_THE_DEFAULT_PALETTE_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_CREATING_AN_ICON_SET_STEPS;H_DELETING_AN_ICON_SET_STEPS;H_EDITING_AN_ICON_STEPS;',0)} See related topics

Toolbox icons list

The Toolbox icons are on the left side of the screen. Toolbox icons provide extra tools for performing Organizer operations and for automating tasks.

Unlike SmartIcons, you can drag and drop entries to Toolbox icons -- for example, to dial a number of an entry, you can drag and drop the entry to and if you are set up on a modem, Organizer will call the number.

A special set of Toolbox icons appears below the Time and Date icons. These icons, called the View icons, change depending on what Organizer section is open. These icons let you display the information -- in each section -- in different formats.

Icon	Function
	Focus, select, and drag and drop entries.
	Pick up and drop entries between pages.
	Create a link.
	Break a link.
	To copy an entry, drag and drop it to Clipboard; to paste an entry, drag and drop it off Clipboard.
	Create an appointment.
	Create a task.
	Create an Address record.
	Create a call.
	Create a page.
	Create an event.
	Create an anniversary.
	Make or log a phone call.
	Print information.
12:18 PM	Shows the current time.
	Shows today's date. Click to turn to today's date in Calendar.
	In Calendar, view a day per page.
	In Calendar, view one work week per two pages.
	In Calendar, view a full week per page.
	In Calendar, view a month per two pages.
	In To Do, sort tasks by priority.
	In To Do, sort tasks by status.
	In Calls, sort calls by last name.
	In Calls, sort calls by company name.
	In Planner, view a year per page.
	In Planner, view a quarter per page.

	In Address, display all information in Address records.
	In Address, display name, job title, company name, address, phone number, and fax number in Address records.
	In Address, display name, job title, phone number, fax number, and e-mail address in Address records.
	In Address, display name and phone number in Address records.
	In Notepad, sort pages by page number.
	In Notepad, sort pages alphabetically by title.
	In Anniversary, sort anniversaries by year.
	In Anniversary, sort anniversaries by month.
	In Anniversary, sort anniversaries by zodiac sign.
	In To Do, Calls, Notepad , or Anniversary, sort by category.
	In To Do, Calls, or Notepad, sort by date.

{button ,AL(`H_ABOUT_SMARTICONS_OVER;H_SMARTICONS_LIST_OVER;H_TOOLBOX_ICONS_LIST_OVER',
0)} See related topics

Address menu
The Address menu appears when you're in the Address section.

Categorize
Assigns a category to an Address record.

Business
Displays the business address in the foreground.

Home
Displays the home address in the foreground.

Change Envelope/Label Format
Lets you select a different envelope and/or label format for a country.

Confidential
Makes an Address record confidential, so others who can access your files can't view it.

{button ,AL(`;H_ASSIGNING_A_CATEGORY_TO_AN_ENTRY_STEPS',0)} See related topics

Anniversary menu
The Anniversary menu appears when you're in the Anniversary section.

Categorize
Assigns a category to an anniversary. See also Assigning a category to an entry.

Alarm
Assigns an alarm to an anniversary. See also Setting alarms for an entry.

Repeat
Creates a repeating anniversary. See also Creating a repeating entry.

Cost
Assigns a cost code to an anniversary. See also Assigning a customer and cost code to an entry.

Occurs Every Year
Enters the anniversary on the same date every year after the year in which you created it.

Confidential
Makes an anniversary confidential, so others who can access your files can't view it.

Appointment menu
The Appointment menu appears when you're in the Calendar section.

Categorize
Assigns a category to an appointment. See also Assigning a category to an entry.

Alarm
Assigns an alarm to an appointment. See also Setting alarms for an entry.

Repeat
Creates a repeating appointment. See also Creating a repeating entry.

Cost
Assigns a cost code to an appointment. See also Assigning a customer and cost code to an entry.

Warn Of Conflicts
Lets you select whether Organizer displays notification of time conflicts. See also Resolving conflicting appointments.

Pencil In
Makes the current appointment tentative. See also Penciling in an appointment.

Confidential
Makes the current appointment confidential, so others who can access your files can't view it.

Call menu
The Call menu appears when you're in the Calls section.

Categorize
Assigns a category to a Calls entry. See also Assigning a category to an entry.

Alarm
Assigns an alarm to a Calls entry. See also Setting alarms for an entry.

Repeat
Creates a repeating Calls entry. See also Creating a repeating entry.

Cost
Assigns a cost code to a Calls entry. See also Assigning a customer and cost code to an entry.

Follow Up
Creates a follow-up Calls entry. See also Creating a follow-up Calls entry.

Completed
Marks a Calls entry completed.

Confidential
Makes a Calls entry confidential, so others who can access your files can't view it.

Create menu

Appointment, Task, Address, Call, Event, Page, Anniversary
Depending on the section you're in, creates the appropriate entry in the section.

Entry In
Creates an entry in a section you specify. See also Creating an entry.

Organizer Link
Links selected entries. See also Creating links.

File Link
Creates a link to run a file. See also Linking to a file or application.

Filters
Creates and edits filters. See also Creating a filter.

Categories
Creates and edits categories. See also Creating a new category.

Cost Codes
Creates and edits cost codes. See also Creating a customer and cost code.

Object
Creates an OLE object on a selected Notepad page. See also Creating a new OLE object in Notepad, Creating an OLE object in Notepad from part of a file, and Creating an OLE object in Notepad from an entire file.

Edit menu

Undo
Undoes your last action. See also Undoing your last action.

Cut
Cuts information and places it on Clipboard.

Copy
Copies information to Clipboard. See also Copying text and Copying a single entry.

Paste
Pastes information from Clipboard. See also Copying text and Copying a single entry.

Clear
Deletes information without placing it on Clipboard.

Copy Special
Copies selected fields from entries. See also Copying Organizer field information to use in other applications.

Paste Special
Selects the format for information you want to paste. See also Pasting text from other applications in Organizer .

Edit (Appointment, Task, Address, Call, Event, Page, Anniversary)
Edits an entry for the current section. This command changes depending on the section in which you are editing an entry.

Organizer Links
Edits information links. See also Changing the order of a link.

Go To
Turns to specified information. See Moving between sections and Moving to a specific date.

Find
Searches for text you specify. See also Finding text.

Layouts
Sets layout options. See also Selecting individual layout print options.

OLE Links
Edits, breaks, or updates embedded objects and linked objects. See also Editing a linked object in Notepad, Breaking an object link in Notepad, and Changing how to update linked objects in Notepad.

Event menu

The Event menu appears when you're in the Planner section.

Categorize

Assigns a category to an event. See also Assigning a category to an entry.

Alarm

Assigns an alarm to an event. See also Setting alarms for an entry.

Repeat

Creates a repeating event. See also Creating a repeating entry.

Cost

Assigns a cost code to an event. See also Assigning a customer and cost code to an entry.

Confidential

Makes an event confidential, so others who can access your files can't view it.

File menu

New
Creates a new file. See also Creating a new Organizer file.

Open
Opens an existing file. See also Opening an Organizer file.

Close
Closes the current file. See also Closing a file.

Save
Saves the current file. See also Saving an Organizer file.

Save As
Saves the current file to another name or location. See also Saving an Organizer file with a different name.

Archive
Transfers all or part of the current file to an archive file. See also Archiving information.

Compact
Compacts your Organizer 97 files to the smallest size possible. See also Compacting a file

Merge
Merges another Organizer file with the current file. See also Merging files.

Import
Imports information from another application or file format. See also Importing an entry.

Export
Exports information to another application or file format. See also Exporting an entry .

TeamMail
Allows you to create a message and distribute it to one or more people with your electronic mail system. See also Sending mail using TeamMail.

Print
Prints information. See Printing information in any Organizer section.

User Setup
Sets Organizer preferences.

Exit Organizer
Ends your Organizer session. See also Ending Organizer.

Help menu
For more information on using Help to learn about Organizer, choose Overview: Using Help to learn about Organizer from Contents.

Help Topics
Displays Help Contents, Index, and Find dialog box.

Bubble Help
Toggles Bubble Help on or off.

Lotus Internet Support
Displays the Lotus Internet Support items.

Tour
Starts the Organizer Tour.

About Lotus Organizer
Displays release and copyright information.

Page menu
The Page menu appears when you're in the Notepad section.

Categorize
Assigns a category to a Notepad page. See also Assigning a category to an entry.

Page
Sets style attributes for Notepad pages. See also Linking Notepad pages, Folding Notepad pages, and Assigning color to Notepad pages.

Confidential
Makes a Notepad page confidential, so others who can access your files cannot view it.

Phone menu

Dial
Dials a number. See also Dialing a number.

Quick Dial
Dials the number of the current entry. See also Dialing a number quickly.

Incoming Call
Lets you log an incoming call. See also Creating a Calls entry for incoming calls.

Section menu

Customize
Customizes a section.

Show Through
Shows information from other sections into a section. See also Displaying entries in more than one section.

Include
Includes a section. See also Including sections from other Organizer files.

Turn To
Turns to a section. See also Moving between sections.

Task menu
The Task menu appears when you're in the To Do section.

Categorize
Assigns a category to a task. See also Assigning a category to an entry.

Alarm
Assigns an alarm to a task. See also Setting alarms for an entry.

Repeat
Creates a repeating task. See also Creating a repeating entry.

Cost
Assigns a cost code to a task. See also Assigning a customer and cost code to an entry.

Completed
Marks a task as completed. See also Marking a To Do task completed.

Confidential
Makes a task confidential, so others who can access your files can't view it.

View menu

The commands in the View menu change depending on the section you're in. For information on the View commands and how they affect the way you can view information in individual sections, see Changing the Calendar view, Sorting To Do tasks, Changing the sort order of Calls entries, Changing the view of Planner events, Sorting addresses, Sorting Notepad pages, and Sorting anniversaries.

The following commands are common to all sections:

Show Clean Screen

If checked, clears the screen of windows controls, including the title bar, menu, SmartIcons, and vertical and horizontal scroll bars so that you have the whole screen in which to view and edit your desktop. See also Using Clean Screen.

Fold (In or Out)

Folds the current page in or out.

Apply Filter

Applies a filter for entries. See also Applying a filter.

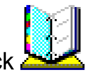
Clear Filter

Clears the current filter. See also Clearing a filter.

Preferences

This command changes depending on the section you're in, for example, Calendar Preferences, To Do Preferences, Address Preferences, and so on. It lets you set the preferences for the particular Organizer section you're in.

Control menu

The Control menu appears when you click  in the title bar.

Restore
Restores the window to its former size after you have enlarged (maximized) it or reduced (minimized) it to an icon.

Move
Moves the window to another position by using the keyboard.

Size
Changes the size of the window by using the keyboard.

Minimize
Reduces the window to an icon.

Maximize or Reduce
Enlarges the window to its maximum size or reduces an enlarged window.

Close
Closes the window.

Overview: Commands

A Command is what lets you perform an Organizer function. Commands appear on the menu bar and in pull-down menus. Some main menus and pull-down menus change depending on what Organizer section you're in. For example, when you're in the Calendar section of Organizer, the Appointment menu will appear.

There are conventions that apply to all commands under all the pull-down menus in every section of Organizer:

- If a command is dimmed, it isn't available for the Organizer section you're in or, in one case, it isn't available in Organizer 97 (for example, Meeting Notices in the File pull-down menu.)
- If a command is followed by an ... (ellipsis), a dialog box will appear when you choose the command.
- If a command is followed by ▶ (arrow), another cascading menu will appear when you choose the command.

Text Menu
The Text Menu appears when you're in the Notepad section.

Character
Assigns Notepad page text attributes of bold, italic, underline, or strike thru. See also Customizing text attributes.

Font
Assigns Notepad page text different fonts and attributes. See also Customizing fonts.

Bullet Style
Assigns bullets to Notepad page text. See also Customizing with bulleted text.

Alignment
Aligns Notepad page text left, right, or center. See also Customizing alignment.

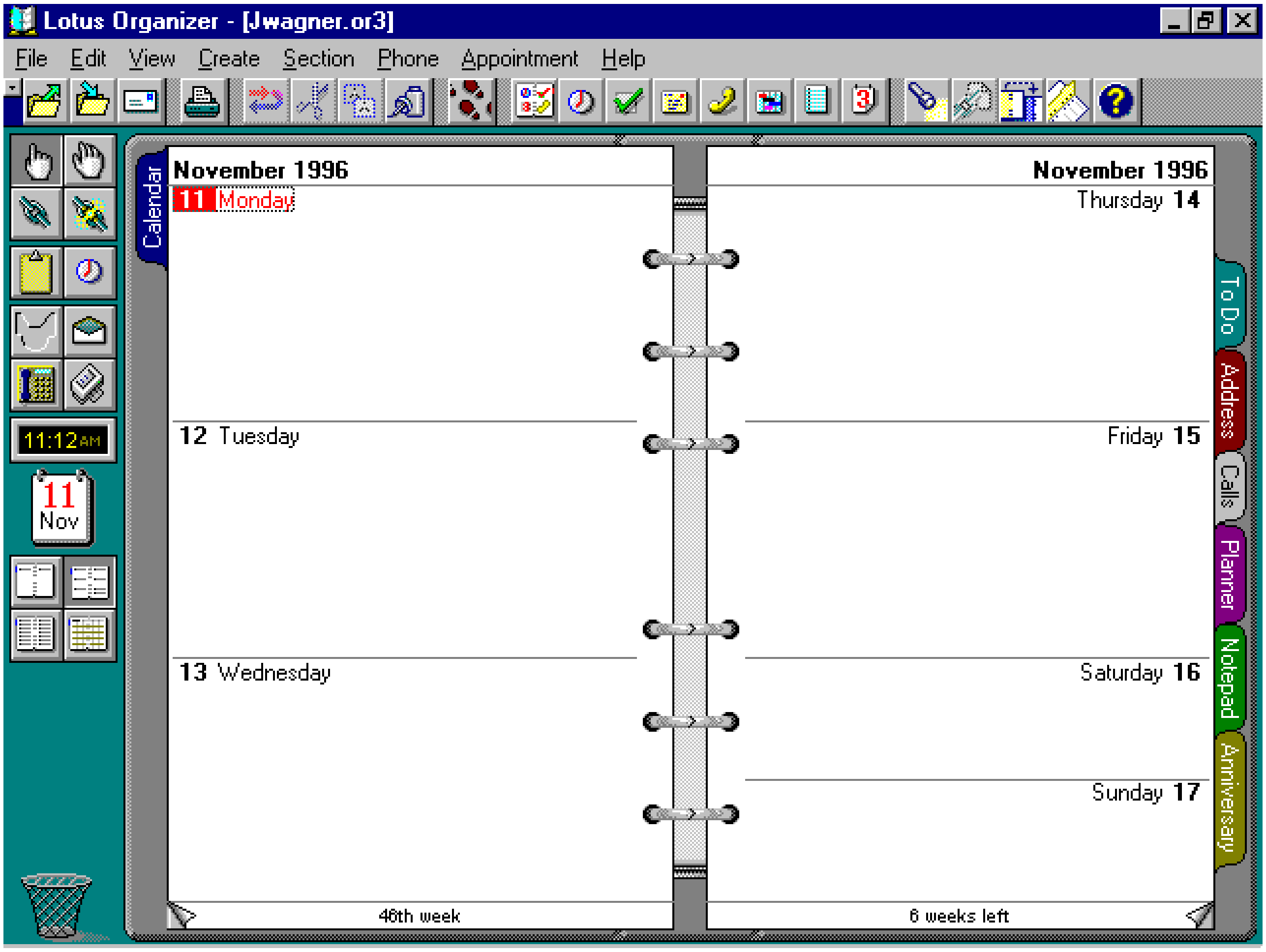
Paragraph
Indents Notepad page paragraphs. See also Customizing paragraph settings.

Tabs
Sets and clears tab stops for positioning Notepad page paragraphs on the Notepad page. See also Customizing tab settings.

Word Wrap
Wraps text within the margins of the Notepad page. See also Customizing how text wraps.

The Organizer workspace

This illustration shows the Organizer workspace. To see information about an area of the screen, click the area. A dotted outline around a part of the workspace indicates general information is available for that area when you click the area inside the dotted outline.



Calendar tab
The section tab of the currently-displayed section, which is Calendar. Tabs for other Organizer sections appear on the left edge of the Organizer binder. To turn to a section, you can click the section tab.

Calendar page

Entries you make in Organizer appear in the appropriate section's page. To create an entry, you can double-click anywhere in the date area of the page.

The Calendar page lets you manage your time and view appointments at a glance. You can schedule appointments, show information in one section from other sections, and customize the appearance of the section by selecting what you want to view and how you want the information sorted.

Clock icon
Displays the current time set by your computer.

Close button
Closes Organizer.

Windows control menu
Displays the Windows control menu commands.

Today's date icon
Displays today's date. You can click here to move to today's date in Calendar.

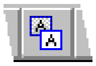
Hide SmartIcons menu

Displays menu for hiding SmartIcons.

Option	Result
Hide this bar of SmartIcons	Hides the set of SmartIcons that is marked with a check at the bottom of the drop-down menu, for example, Universal.
Hide all SmartIcons	Hides all sets of SmartIcons available to you in Organizer.
SmartIcons Setup	Opens the SmartIcons Setup dialog box.

SmartIcons

SmartIcons are a set of icons (symbols on buttons) that provide one-click shortcuts to perform Organizer functions and commands.

For example,  copies an object you select to Clipboard.

If you are using Organizer with a mouse, you can use Bubble Help to see what each icon does.   Bubble Help is initially turned on in Organizer (default).

To turn off Bubble Help, choose Help - Bubble Help, press CTRL+F1, or click .

With Bubble Help on, a description of each icon appears in a bubble when you move the mouse pointer over the icon.

Maximize button
Maximizes the window so it fills the entire screen.

Menu bar
Contains the commands you use in Organizer to perform an action.
Click a command to choose it.

Minimize button
Minimizes the window so that it appears as an icon on your Windows Taskbar.

Page turners
Turns the page to display the previous or next page in the Organizer notebook.

Restore button
Restores a window to its previous size.

Section tabs
Display each section of Organizer. To turn to a section, you can click the section tab.

Title bar
Contains the Windows control menu, the program name, the Minimize button, the Maximize or Reduce button, and the Close button.

Organizer also displays the name of the file you are working in the title bar after the program name, for example, Jwagner.or3.

Toolbox

The Toolbox icons provide one-click shortcuts to perform the most commonly used Organizer functions and commands.

For example,  creates an appointment in Calendar.

If you are using Organizer with a mouse, you can use Bubble Help to see what each icon does.
Bubble Help is initially turned on (default). To turn off Bubble Help, choose Help - Bubble Help, press CTRL+F1, or click .
With Bubble Help on, a description of each icon appears in a bubble when you move the mouse pointer over the icon.

Trash icon
You can delete an entry by dragging and dropping it to Trash.

View and Sort icons

The View and Sort icons let you display the current Organizer section in different ways. Each section has its own set of View or Sort icons.

For example, these icons, the Calendar View icons display Calendar pages as single days, a week, 2 weeks, or a month.

Overview: To Do section

The To Do section helps you keep track of what you want to do and when you must do it. With the To Do section, you can do the following activities:

- Enter To Do tasks.
- Group To Do tasks by category.
- Prioritize To Do tasks by importance.
- Group To Do tasks by status.
- Sort To Do tasks by start date, due date, or completion date.
- Show through To Do tasks in the Calendar section so you can see all of your tasks in your Calendar.
- Track projects, ideas, and status report entries.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Details: Changing preferences in To Do

Changing your To Do preferences
You can change any To Do preferences so that your To Do information appears and functions the way you want. You can also change To Do preferences as frequently as you want.

Sorting your To Do tasks
For example, let's say every Thursday you attend a marketing meeting during which you must summarize what you've accomplished. Before you attend the meeting, you can sort your To Do information in the way most helpful for you. To group together your marketing-related To Do tasks, you can sort To Do tasks by category. To ensure all your To Do tasks for the week are completed, you can sort To Do tasks by status.

How changing views affect To Do tabs
To Do uses page tabs to group information within the section.

For example, you can use 1, 2, 3, and None for Priority; Overdue, Current, Future, and Completed for Status; you can use an alphabetical A - Z scheme for categories; and you can use dates, either by start dates or due dates, as your tabs.

How Completed To Do tasks appear
Depending on the selections you make to your To Do Preferences options, your completed To Do tasks appear and function differently. For example, you can show completed To Do tasks with a strikeout line, and you can automatically delete completed To Do tasks.

Showing completed To Do tasks with and without a strikeout line
Under To Do Preferences options, select Strikeout to show completed To Do tasks with a strikeout line. If you don't select Strikeout, your completed To Do tasks appear without a strikeout line through them.

Automatically deleting completed To Do tasks
Under To Do Preferences options, you can choose to have your completed To Do tasks automatically deleted. When you select Delete task when completed, your To Do tasks automatically disappear from your To Do section when they are completed.

Understanding how text color changes with the status of To Do tasks
If you select Show completed tasks, your To Do tasks will move automatically to the Completed page or to the Completed heading. The color of the To Do task text changes when To Do tasks are marked Completed.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS',1)} Go to procedure

Changing preferences in To Do

To Do preferences determine how your To Do task entries are sorted and what information appears with them. Changing preferences is optional; if you don't change your To Do preferences, Organizer uses the default preferences.

1. Go to the To Do section and choose View - To Do Preferences.

   See details
2. Under View, select the appropriate option for how you want to sort To Do pages.
3. Under Show, select the appropriate options for what you want to appear with your To Do tasks.
4. Under Options, select the appropriate options.
5. Under Status color, select the color to represent the status of the To Do tasks you enter.
6. Click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Changing the status color of To Do tasks

1. Go to the To Do section and choose View - To Do Preferences.
2. Under Status color, click the drop-down box for each of the default status colors you want to change.

   For example, if you want to change the default status color for Overdue, click the Overdue drop-down box.
3. Select a new status color.
4. When you finish selecting the status colors you want, click OK.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;',0)} See related topics

Checking the status of a To Do task

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

1. Go to the To Do task.
2. Check the status of your To Do task by checking the color of the To Do task description.

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Details: Deleting a To Do task

Keyboard shortcuts

You can also select a To Do task and then press CTRL+X or DEL to delete a To Do task.

Deleting a To Do task in other ways

You can also select a To Do task and choose Edit - Cut or click  to delete a To Do task.

{button ,AL(`H_DELETING_A_TO_DO_TASK_STEPS',1)} Go to procedure
{button ,AL(`;H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS',0)} See related topics

Deleting a To Do task

1. Select the To Do task you want to delete.
2. Drag and drop the To Do task to  in Toolbox.

Note To retrieve a deleted To Do task, choose Edit - Undo Task Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_A_TO_DO_TASK_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Details: Editing a To Do task

Keyboard shortcuts
You can also select a To Do task and press CTRL+E or press SHIFT+ENTER to edit the task description directly.

Editing To Do tasks in other ways
You can also select a To Do task and choose Edit - Edit Task to edit a To Do task.

Changing the description
Under Description, edit the description of the selected To Do task by entering the appropriate text.

For example, let's say that the description of your To Do task was: Meet with Mary about trip. Perhaps you've received information from your travel agent and you want the To Do task description to be more specific. Change the description to: Meet with Mary to go through trip itinerary and car rental reservations.

Changing the start and due dates
Under Date, select a start or due date by clicking the Start or Due drop-down box. When the calendar appears, select a new date.

For example, if you assign a To Do task a due date of October 14, but you were given a three-day extension, click the Due drop-down box. When the calendar appears, select October 17.

Changing a category
Click the Categories drop-down box to select the category you want associated with the To Do task.

For example, if you assign a To Do task the Sales category but you decide it should be changed to the Finance category, click the Category drop-down box and select Finance.

Changing a priority
Select the priority you want to assign your To Do task.

For example, if your manager wants a report written by tomorrow, assign that To Do task a priority of 1. If you were given a week extension, select Priority and assign the To Do task an appropriate priority, for example a priority of 2 or 3.

Changing the completion date
Click the Completed on drop-down box to select a date.

Changing the confidentiality
Select Confidential to keep your work confidential.

For example, if others can read and write to your To Do task file because they have read and write access and you are coordinating an awards ceremony for a co-worker and want to keep a To Do task confidential, select this option, and the co-worker cannot read or write to this To Do task.

{button ,AL(`H_EDITING_A_TO_DO_TASK_STEPS',1)} Go to procedure

{button ,AL(`;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS',0)} See related topics

Editing a To Do task

1. Double-click the To Do task.
2. Edit the To Do task.

   See details
3. Click OK to enter your changes.

Tip Press TAB to move between options in the Edit Task dialog box.

{button ,AL(`H_EDITING_A_TO_DO_TASK_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Details: Creating a To Do task

Keyboard shortcuts
You can also go to the To Do section and press INS to create a To Do task.

Creating To Do tasks in other ways
You can also choose Create - Task when you are in the To Do section.

{button ,AL(`H_INSERTING_A_TO_DO_TASK_STEPS',1)} Go to procedure

Creating a To Do task

1. Go to the To Do section and double-click the To Do page.

2. Under Description, enter a description for the To Do task.
3. (Optional) Select the appropriate options: Date, Categories, Priority, Completed on, Confidential.
4. Click OK.

Tip To create additional To Do tasks, click Add before you click OK. When you finish entering all your To Do tasks, click OK.

{button ,AL(`H_INSERTING_A_TO_DO_TASK_DETAILS',1)} See details

{button ,AL(`H_ABOUT_TO_DO_OVER;H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Selecting To Do task options

Option	Result
No date	Assigns (default) no date to the To Do task you create.
Start	Uses or doesn't use (default) a start date for each To Do task you create.
Due	Uses or doesn't use (default) a due date for each To Do task you create.
Categories	Establishes a category for each To Do task you create. For example, marketing, finance, and so on.
Priority	Establishes a priority or uses no priority (default) for each To Do task you create.
Completed on	Lets you specify or not specify (default) the date you completed the To Do task.
Confidential	Makes or doesn't make (default) the To Do task confidential, so others accessing your file can't view it.
	If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Details: Marking a To Do task completed

Marking To Do tasks completed in other ways
You can also mark a To Do task completed by clicking  to the left of the To Do task.

Completing To Do tasks
Depending on the selections you made to your To Do Preferences options (in the To Do Preferences dialog box), your completed To Do tasks appear and function differently.

If you selected Strikeout, Organizer shows completed To Do tasks with a strikeout line. If you selected Delete task when completed, your To Do tasks automatically disappear from your To Do section when they are completed.

Understanding how status changes affect To Do tasks
If you select Show completed tasks, your To Do tasks will move automatically to the Completed page or to the Completed heading. The color of the To Do task text changes when To Do tasks are marked Completed.

{button ,AL(`H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS',1)} Go to procedure

Marking a To Do task completed

1. Double-click the To Do task you want to mark completed.
2. Click the Completed on drop-down box.
3. Select the date you want.
4. Click OK.

{button ,AL(`H_MARKING_A_TO_DO_TASK_COMPLETED_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Sorting To Do task options

The Sort icons appear in Toolbox. You can click one instead of choosing the command.

Command	Result
By Priority 	Sorts your To Do priority page tabs as 1, 2, 3, none; A, B, C, none; H, M, L, none. (None is for tasks you didn't assign a priority to.)
By Status 	Sorts (default) your To Do status page tabs as Overdue, Current, Future, and Completed.
By Start date 	Sorts your To Do date page tabs by start date: January through December of the current year with additional tabs for the former and the latter years.
By Category 	Sorts your To Do categories page tabs alphabetically (A - Z) and includes # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.

Details: Prioritizing a To Do task

Assigning a priority to a To Do task
You can assign a priority of 1, 2, or 3 to your To Do task; 1 represents the highest priority and 3 represents the lowest. You can also assign no priority (default) to your To Do task.

{button ,AL(`H_PRIORITIZING_A_TO_DO_TASK_STEPS',1)} Go to procedure

Prioritizing a To Do task

You can assign a priority when you create or edit a To Do task.

1. Create or edit a To Do task.
2. Select the priority you want to assign to your To Do task.
   See details
3. Click OK.

{button ,AL(`H_PRIORITIZING_A_TO_DO_TASK_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Details: Showing To Do tasks in Calendar

Editing a To Do task in Calendar

If you want to edit a To Do task and you are in the Calendar section, double-click the To Do task. The Edit Task dialog box appears. Make your changes and click OK.

Rescheduling a To Do task in Calendar

If you want to reschedule a To Do task and you are in the Calendar section, you can drag and drop the To Do task to a different day on any of the days that appear on your current pages. If you want to reschedule a To Do task to a day on another page, click in Toolbox, select the To Do task, go to the day you want, and click.

Showing entries while displaying time slots in day per page view

If you are using the Day per Page view, the display of show-through entries is static when you're displaying time slots. The show-through entries do not scroll out of view as you scroll through the day's appointments; that is, the show-through entries stay either above or below the time slots.

To show through entries, Organizer blocks out an area at the top or bottom of your appointments. You can expand or shrink this block by dragging the solid box in the bottom-right corner. The new size of this area affects all pages in the Day per Page view.

Alternatively, you can drag the solid box using the right mouse button. When you release the mouse button, Organizer displays a menu with the following choices:

- New Size to use the size you dragged for all pages.
- Temporary Size to use the size you dragged for the current page only. The temporary size remains in effect only as long as you continue to work on the current page. For example, if you temporarily change the size for October 16, then go to October 23, when you return to October 16, the temporary size is no longer in effect.
- Cancel to reset the block to its previous size.

{button ,AL(`H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS',1)} Go to procedure
{button ,AL(`;H_EDITING_A_TO_DO_TASK_STEPS;H_SHOWING_ENTRIES_FROM_OTHER_SECTIONS_IN_CALENDAR_STEPS',0)} See related topics

Showing To Do tasks in Calendar

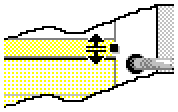
Organizer can show entries from the To Do, Calls, Planner, and Anniversary sections on the appropriate day in Calendar. Showing entries from other sections can help you see your upcoming commitments in the context of your daily work - for example, you can see your To Do tasks for the day along with your appointments.

1. Choose Section - Show Through.

2. Click the Show into drop-down box and select Calendar as the section to show into
3. Under From, select To Do.
4. (Optional) Click Preferences and select options for whether To Do tasks appear above or below appointments and how much of the To Do task's description to show in Calendar.
5. Click OK.

{button ,AL(`H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SORTING_THE_TO_DO_LIST_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics



Details: Sorting To Do tasks

Changing the default sort order of To Do tasks in other ways
You can choose View - To Do Preferences to change the sort order of your To Do tasks.

How sorting affects To Do tasks
To Do uses page tabs to group information within the section. The tabs you see depend on the sort order you select for To Do tasks.

If you sort To Do tasks by priority, Organizer displays tabs for the priority scheme you selected (1,2,3 or A,B,C or H,M,L). If you sort by status, Organizer displays tabs for Overdue, Current, Future, and Completed. If you sort by start date, Organizer displays month tabs, along with a tab for the previous and next year. If you sort by category, Organizer displays alphabetical tabs showing A - Z, with # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @, or numbers like 01890.

{button ,AL(`H_SORTING_THE_TO_DO_LIST_STEPS',1)} Go to procedure

Sorting To Do tasks

You can sort your To Do tasks by priority, status, start date, or category.

1. Go to the To Do section.
2. Choose View.
3. Choose one of the following commands.
4. Click OK.

{button ,AL(`H_SORTING_THE_TO_DO_LIST_DETAILS',1)} See details

{button ,AL(`H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_EDITING_A_TO_DO_TASK_STEPS;H_DELETING_A_TO_DO_TASK_STEPS;H_PRIORITIZING_A_TO_DO_TASK_STEPS;H_MARKING_A_TO_DO_TASK_COMPLETED_STEPS;H_SHOWING_TO_DO_TASKS_IN_CALENDAR_OR_PLANNER_STEPS;H_CHECKING_THE_STATUS_OF_A_TO_DO_TASK_STEPS;H_CHANGING_THE_STATUS_COLOR_OF_TO_DO_TASKS_STEPS',0)} See related topics

Status of To Do tasks

The following table lists default colors used to indicate the status of tasks in the To Do section. You can change the colors using View - To Do Preferences.

Status	Color
Overdue	Red (default).
Current	Green (default).
Future	Blue (default).
Completed	Black (default).

Selecting the sort order of To Do tasks

Option	Result
Priority	Sorts your To Do priority page tabs as 1, 2, 3, none; A, B, C, none; or H, M, L, none. (None is for tasks you didn't assign a priority to.)
Status	Sorts (default) your To Do status page tabs as Overdue, Current, Future, and Completed.
Start date	Sorts your To Do date page tabs by start date: January through December of the current year with additional tabs for the former and the latter years.
Category	Sorts your To Do categories page tabs alphabetically (A through Z) and includes # for entries you didn't assign a category to or entries that begin with non-alphabetical characters, such as @, or numbers like 01890..
Due date	Sorts your To Do date page tabs by due date (January through December of the current year with additional tabs for the former and the latter years) or by completion date.

Customizing the appearance and function of your To Do section

Option	Result
Start headings	Lets you place your To Do task priority headings starting at the top of the next page (default), one after another on the same page, each priority heading starting on the left page, or each priority heading starting on the right page.
Priority as	Lets you specify the priority rating of your To Do tasks as 1, 2, 3 (default); A, B, C; or H, M, L.
Show page tabs	Shows (default) or doesn't show the To Do page tabs, for example, priority, status, category, or date page tabs.
Show	Shows or doesn't show (default) a symbol with To Do tasks.  indicates that a task is confidential.  indicates that a task has an alarm.  indicates that a task is a repeating entry.  indicates that a category symbol appears with the task. The symbol for the category you specified appears with each task.
Show completed tasks	Shows (default) or doesn't show the completed To Do task.
Strikeout	Draws a line through the To Do task when you mark the task completed.
Delete task when completed	Automatically deletes a To Do task when you mark it completed.
Turn to entry after Create/Edit	Goes (default) or doesn't go to the page on which the To Do task is entered or edited.

Selecting what information you see with your To Do task

Option	Result
Start date	Shows (default) or doesn't show the start date you assign your To Do task.
Due date	Shows (default) or doesn't show the due date you assign your To Do task.
Categories	Shows or doesn't show (default) the categories you assign your To Do task.
Priority	Shows (default) or doesn't show the priority you assign your To Do task.
Completed date	Shows or doesn't show (default) the date on which you complete your To Do task.
Cost code	Shows or doesn't show (default) the cost code you assign your To Do task.
All lines of description	Shows (default) or doesn't show the entire description of your To Do task. You can enter a number to represent the number of lines of description you want to appear with your To Do tasks.

Selecting the status color of your To Do tasks

You can change the default colors listed below.

Option	Result
Overdue	Red (default).
Current	Green (default).
Future	Blue (default).
Completed	Black (default).

Overview: Using Organizer on a notebook computer

If you typically work on a PC that is connected to a network, and you share your Organizer file with an assistant, you can continue to work on your file away from the office. Let's say you need to travel on business and you want to take your Organizer file with you on a notebook computer. You can enter Calendar appointments, To Do tasks, Calls entries, Notepad pages, Planner events, and Anniversaries, and use all the other functions of Organizer. When you return to the office, you can merge your file with the file on the network, to which your assistant made changes. Organizer can merge all entries and changes you made, or you can select specific entries and changes that you want to transfer to your file at work.

Note The Organizer program files must be installed on the notebook computer you're using while away from the network.

To ensure accurate file-merge results, you should always copy the most current network version of your file to your notebook computer before you disconnect from the network.

For example, lets say you typically work with a file on your notebook computer, and then merge the file from your notebook computer to your network file. The next time you're going to work away from the network, you should copy the most current network file to your notebook, rather than using the existing copy on the notebook. If you don't, the next time you perform a merge operation Organizer will re-enter the changes you've already added to the network file, and you may end up with duplicate entries.

To avoid duplicate entries, after you merge your notebook computer file with the original network file, make a local copy of the newly merged file that's now on your network to write over the outdated file on your notebook computer.

{button ,AL(`H_ABOUT_USING_ORGANIZER_ON_A_LAPTOP_OVER;H_FINDING_FILES_ON_A_NETWORK_STEPS;H_COPYING_FILES_FROM_A_NETWORK_TO_A_LAPTOP_STEPS;H_MERGING_FILES_STEPS',0)} See related topics

Details: Accessing a linked application

Switching between Organizer and other Windows applications
To switch between Organizer and any open Windows application, press ALT+TAB.

Understanding Link menu information
A Link menu lists all information that's linked to an entry.

The link description is preceded by a symbol that indicates the Organizer section that the link is in. For example, the symbol  indicates the Calendar section.

The  at the end of a link description indicates that this linked entry contains additional links. For example, you may have linked a scheduled appointment to more than one Address record.
An ... (ellipsis) after a link description indicates that the link is to an external file or application.

Removing the display of the Link menu
You can remove the display of the Link menu from your screen by clicking anywhere on the page.

{button ,AL(`H_ACCESSING_A_LINKED_APPLICATION_STEPS',1)} Go to procedure

Accessing a linked application

You can access an external file or run an application using a link you already established.

1. Go to the entry that is linked to the file or application you want.
2. Click the link next to the entry.

   The Link menu appears. Any link to an external file or application displays an ... (ellipsis) after the link's description.
3. Click the link's description to the external file or application you want.

   See details
4. When you finish with the external file or application, choose File - Exit or switch back to the Organizer window.

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

{button ,AL(`H_ACCESSING_A_LINKED_APPLICATION_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} See related topics

Details: Changing a link's description or the file name or application to link to

Changing a link's description or the file name or application to link to in other ways
You can choose Edit - Organizer Links to change a link you selected. When the File Link dialog box appears, click File Link and make your changes.

{button ,AL(`H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS',1)} Go to procedure

Changing a link's description or the file name or application to link to

1. Go to the link whose description or file name you want to change.
2. Click the link next to the entry.
3. Click the ... (ellipsis) at the end of the linked item.
   The File Link dialog box appears, displaying the link description and file information.
4. Edit the link description or path and file name.
   If necessary, click Browse to see a listing of available files and applications, and then click Open to select the file.
5. Click OK.

{button ,AL(`H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_DETAILS',1)} <u>See details</u>

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_EDITING_A_LINK_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} <u>See related topics</u>

Details: Creating links

Creating links in other ways
You can also create a link between two or more selected entries by clicking the first entry you want to link and then pressing and holding CTRL as you click any additional entries you want to link to. Then choose Create - Organizer Link to create a link between two or more selected entries.

You can also press CTRL+L to create a link between two or more selected entries.

Linking entries when you create an entry
You can create a link to an existing entry when you create a new entry.

Press and hold SHIFT while you drag and drop the existing entry to the section tab for the new entry. The Create dialog box appears, with a link already set to the existing entry.

{button ,AL(`H_CREATING_LINKS_STEPS',1)} Go to procedure

Creating links

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

1. Go to the information you want to link.
2. Click the Link icon in Toolbox.

When you move the mouse pointer over the information you want to link, it changes to .

3. Select the information you want to link.

   The pointer changes to .

4. Locate the information you want to link to, such as an Address record.
5. Click the information you want to link to.

 appears next to any linked information.

{button ,AL(`H_CREATING_LINKS_DETAILS',1)} See details

{button ,AL(`H_CREATING_MULTIPLE_LINKS_IN_ORGANIZER_STEPS;H_EDITING_A_LINK_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;',0)} See related topics

Details: Creating multiple links in Organizer

Creating multiple links in other ways
You can also create a link between two or more selected entries by clicking the first entry you want to link and then pressing and holding CTRL as you click any additional entries you want to link to. Then choose Create - Organizer Link to create a link between two or more selected entries.

You can also press CTRL+L to create a link between two or more selected entries.

Linking entries to existing entries
You can create a link to an existing entry when you create an entry.

Press and hold SHIFT while you drag and drop the existing entry to the section tab for the new entry. The create dialog box appears, with a link already set to the existing entry.

{button ,AL(`H_CREATING_MULTIPLE_LINKS_IN_ORGANIZER_STEPS',1)} Go to procedure

Creating multiple links in Organizer

You can create links to more than one piece of information. For example, you can create multiple links from an appointment scheduled in Calendar to all the Address records of the people attending the appointment and to a Notepad page that lists the agenda.

1. Go to the information you want to link.
2. Click the Link icon in Toolbox.

When you move the pointer over the information you want to link, it changes to .

3. Select the information you want to link.

   The pointer changes to .

4. Locate the information you want to link to, such as an Address record.
5. Click the information you want to link to.

 appears next to any linked information.

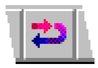
6. Repeat steps 1-5 above to create more links.

{button ,AL(`H_CREATING_MULTIPLE_LINKS_IN_ORGANIZER_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_EDITING_A_LINK_STEPS;H_DELETING_A_LINK_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} See related topics

Details: Deleting a link

Deleting links in other ways
You can also delete links by choosing Edit - Organizer Links. From the Organizer Links dialog box that appears, select the link you want to delete and click Delete.

Undoing delete in other ways
You can also click  to undo deleting a link.

{button ,AL(`H_DELETING_A_LINK_STEPS',1)} Go to procedure

Deleting a link

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

1. Go to the information you want to unlink.
2. Click the Broken link icon in Toolbox.

When you move the pointer over the information you want to unlink, it changes to .

3. Click the link next to the entry you want to unlink.

   The Link menu appears, listing any links associated with the selected entry.

4. Click the link you want to delete.

   When the last link to an entry is deleted, no longer appears next to the entry.

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

{button ,AL(`H_DELETING_A_LINK_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_EDITING_A_LINK_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} See related topics

Displaying associated links

Some of your links may have several associated links -- that is, links connected to other links, and so on. Organizer lets you see a list of any link's associated links.

1. Go to the link whose associated links you want to see.
2. Select the link's entry.
3. Choose Edit - Organizer Links.

   The Organizer Links dialog box appears.
4. Select the link whose associated links you want to see.
5. Click Follow.

   The associated links appear.
6. Click OK.

{button ,AL(`H_EDITING_A_LINK_STEPS;H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS',0)} See related topics

Details: Displaying a list of links

Using linked pages

It is helpful to link pages that contain related information. Pages may contain many links.

For example, let's say your upcoming marketing event will include keynote speakers. You can include the names of these speakers in your Event Materials chapter and add relevant information about them. To make contacting them easier, you can create links to their addresses in the Address section so you can quickly call them or locate their address to correspond with them.

{button ,AL(`H_DISPLAYING_A_LIST_OF_LINKS_STEPS',1)} Go to procedure

Displaying a list of links

You can use a Notepad Links page to display a list of links you make to the Notepad page. For example, you can create a page with links to all the information for one project or to your most commonly used applications.

1. Create a Notepad page.
2. Under Style, select Links page.

   See details
3. Click OK.
4. Create links between Organizer entries and the Notepad Links page.

   As you add links to the Notepad Links page, Organizer enters the description of the entry you're linking to to the page.
5. (Optional) Click the entry on the page to go to that entry.

Note If you create multiple links to a Notepad page without making the page a Links page, Organizer displays only one link symbol for all the links you create to the Notepad page.

{button ,AL(`H_DISPLAYING_A_LIST_OF_LINKS_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_EDITING_A_LINK_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_LINKING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Changing the order of a link

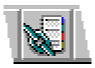
Changing the order of a link in other ways
You can click Up or Down to change the order in which your link entries are listed.

{button ,AL(`H_EDITING_A_LINK_STEPS',1)} Go to procedure

Changing the order of a link

You can edit the order in which your link entries and descriptions appear.

1. Select the linked entry you want to edit.
2. Choose Edit - Organizer Links.



3. Under Order by, select the order in which you want your link entries and descriptions to appear.
4. Click OK.

{button ,AL(`H_EDITING_A_LINK_DETAILS',1)} See details

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} See related topics

Linking to a file or application

You can link information in Organizer to other files or applications. For example, you can link a scheduled budget appointment to a spreadsheet that contains budget forecasts.

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

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

   If necessary, click Browse to see a listing of available files and applications, and then click Open to select the file.
5. Click OK.

Note To link to an external file with a non-standard extension, first specify the path to the application that the file was created in, followed by a space; then specify the path to the file. For example: C:\wpwin\wpwin.exe D:\organize\sample\mailmrg.prm. Additionally, if you link to an executable file that has a long file name, you must enclose the path and the file name in quotation marks. For example: "C:\windows\Copy of Notepad.exe".

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} See related topics

Details: Navigating through linked information

Understanding Link menu information

A Link menu lists all information that's linked to an entry.

The link description is preceded by a symbol that indicates the Organizer section that the link is in. For example, the symbol  indicates the Calendar section.

The  at the end of a link description indicates that this linked entry contains additional links. For example, you may have linked a scheduled appointment to more than one Address record.
An ... (ellipsis) after a link description indicates that the link is to an external file or application.

Removing the display of the Link menu

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

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_STEPS',1)} Go to procedure

Navigating through linked information

You can see an entry's links in a Link menu. Link menus are rectangular boxes that display a link's description, the Organizer section the linked information is in, and whether the linked entry contains more than one link. Use Link menus to navigate through linked information.

1. Go to the linked entry.
2. Click the link  next to the entry.

   One or more rectangular boxes appear, which are the Link menu(s).
3. From the Link menu, click the link you want.

   See details

   If a  appears at the end of a linked item, first click the arrow to display additional links; then click the link you want.

Organizer goes to the linked item you select.

{button ,AL(`H_NAVIGATING_THROUGH_LINKED_INFORMATION_DETAILS',1)} See details

{button ,AL(`H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS;H_CHANGING_A_LINK_TO_AN_EXTERNAL_FILE_OR_APPLICATION_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS',0)} See related topics

Ordering links and link descriptions

Option	Results
User defined	Displays link entries in the order they were created.
Ascending date	Displays link entries in chronological order, oldest entry first.
Link description	Displays link entries in alphabetical order by the first letter of the entry description.
Descending date	Displays link entries in reverse chronological order, newest entry first (default).

Overview: Links

You can create links between discrete pieces of information in different sections in Organizer or between entries in the same section. Creating links lets you cross-reference associated Organizer material.

For example, you can link an appointment in your Calendar to a person in your Address section for quick access to that person's phone number. You can also create multiple links from an appointment scheduled in Calendar to all the Address records of the people attending the appointment and to a Notepad page that lists the meeting's agenda.

In addition to linking information, you can also link Organizer information to other files or applications. For example, you can link a scheduled budget appointment to a spreadsheet that contains budget forecasts.

To keep track of your linked information, you can create a Notepad page with links to all the information for one project or to your most commonly used applications.

Note Creating Organizer links is different from creating OLE links in Organizer. Organizer links are created in all sections of Organizer; OLE links are created in the Notepad section exclusively.

{button ,AL(`;H_CREATING_LINKS_STEPS;H_CREATING_MULTIPLE_LINKS_IN_ORGANIZER_STEPS;H_DELETING_A_LINK_STEPS;H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_EDITING_A_LINK_STEPS',0)} See related topics

Turning to a specific linked entry

Some of your entries may have many links. Organizer lets you see what links an entry has and lets you turn directly to the linked entry you want.

1. Go to the entry whose links you want to see.
2. Select the entry.
3. Choose Edit - Organizer Links.

   The Organizer Links dialog box appears.
4. Select the link you want to turn to.
5. Click Turn To.

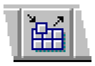
   Organizer turns to the linked entry you selected.
6. Click Cancel to close the Organizer Links dialog box.

{button ,AL(`H_DISPLAYING_A_LIST_OF_LINKS_STEPS;H_DISPLAYING_ASSOCIATED_LINKS_STEPS;H_ACCESSING_A_LINKED_APPLICATION_STEPS',0)} See related topics

Adding an icon to the default set of SmartIcons

When you initially start Organizer, a set of SmartIcons appears across the top of the screen; these are the default SmartIcons. You can customize your set of SmartIcons by adding those icons you'll use most often.

1. Choose File - User Setup - SmartIcons Setup.



2. Under Available icons (drag to add), use the scroll bar to view the entire set of SmartIcons list.
3. Drag any icon from the Available icons (drag to add) list to the set of Smarticons at the top of the dialog box.

Tip To change the order of your icons, drag and drop them to the position you want.

4. Click OK.

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_EDITING_AN_ICON_STEPS;',0)} See related topics

Details: Attaching a script to an icon

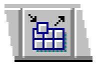
Selecting a script or executable file
You can find a script or executable file in the following ways: Click the Look in drop-down box to select the path where the script or executable file is located. For File name, enter the name of the script or executable file. Click the Files of type drop-down box to select the type of file you want.

{button ,AL(`H_ATTACHING_A_SCRIPT_TO_AN_ICON_STEPS',1)} Go to procedure

Attaching a script to an icon

You can associate a script or an executable file (such as a .BAT or .EXE file) to start an application with a customized icon only. You can't associate a script or an executable file to a standard Organizer icon that you didn't customize to do so.

1. Choose File - User Setup - SmartIcons Setup.



2. Click Edit Icon.
3. Scroll through the Available icons you can edit or copy list, and select the icon you want to attach a script to.
4. Click Attach Script and select a script or executable file to attach.

   See details
5. Click Open.
6. Click Save.
7. Click Done.

{button ,AL(`H_ATTACHING_A_SCRIPT_TO_AN_ICON_DETAILS',1)} See details

{button ,AL(`H_EDITING_AN_ICON_STEPS;H_LAUNCHING_ANOTHER_APPLICATION_FROM_ORGANIZER_STEPS',0)} See related topics

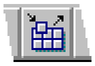
Details: Changing the set of SmartIcons you want to display

Using the Bar is enabled to display during its context option
When you define that a set of SmartIcons will appear for a specific context -- such as when you're editing a Notepad page -- select the Bar is enabled to display during its context option. This option works in conjunction with your selection to control which set of SmartIcons appears when you edit Notepad pages.

{button ,AL(`H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS',1)} Go to procedure

Changing the set of SmartIcons you want to display

1. Choose File - User Setup - SmartIcons Setup.



2. Click the Bar name drop-down box and select the set of Smarticons you want to display.
3. Click the Bar can be displayed when context is drop-down box and select the appropriate option.
4. If you want the selected set of SmartIcons to display at specific times, select the Bar is enabled to display during its context option.

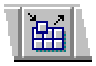
   See details
5. Click OK.

{button ,AL(`H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_DETAILS',1)} See details

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_ADDING_AN_ICON_TO_THE_DEFAULT_PALETTE_STEPS;H_EDITING_AN_ICON_STEPS;H_CHANGING_THE_SIZE_OF_AN_ICON_STEPS;',0)} See related topics

Changing the size of an icon

1. Choose File - User Setup - SmartIcons Setup.



2. Under SmartIcons preferences, click the Icon size drop-down box.
3. Select the appropriate option.
4. Click OK.

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_EDITING_AN_ICON_STEPS;',0)} See related topics

Details: Details: Creating a set of SmartIcons

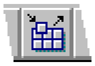
Using the Bar is enabled to display during its context option
When you define that a set of SmartIcons will appear for a specific context -- such as when you're editing a Notepad page -- select the Bar is enabled to display during its context option. This option works in conjunction with your selection to control which set of SmartIcons appears when you edit Notepad pages.

{button ,AL(`H_CREATING_AN_ICON_SET_STEPS',1)} Go to procedure

Creating a set of SmartIcons

You can create a new set of SmartIcons by customizing your current set and then saving the new set of SmartIcons to another name.   If you modify a selected set and save it to another name, only the new set contains the changes. The old set of SmartIcons remains unchanged. If you don't modify the selected set and save it to another name, the new set becomes a copy of the original set.

1. Choose File - User Setup - SmartIcons Setup.



2. Click the Bar name drop-down box and select the set of SmartIcons you want to base the new set on.
3. Add, move, group, or remove SmartIcons until the SmartIcon set is the way you want.
4. Click Save Set.
5. Click Save As New to save the new SmartIcons set to another name.
6. For SmartIcons bar name, enter the name you want for the new set of SmartIcons.

   If necessary, click Browse and select the path to which you'll save the new set of SmartIcons file.
7. For SmartIcons file name, enter the file name you want for the new set of SmartIcons.
8. Click OK to return to the SmartIcons Setup dialog box.
9. Click the Bar can be displayed when context is drop-down box and select the appropriate option.
10. If you want the selected set of SmartIcons to display at specific times, select the Bar is enabled to display during its context option.

    See details
11. Click OK.

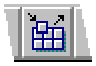
    The name of the new set of SmartIcons appears in the Bar name drop-down box.

{button ,AL(`H_CREATING_AN_ICON_SET_DETAILS',1)} See details

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_ADDING_AN_ICON_TO_THE_DEFAULT_PALETTE_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_EDITING_AN_ICON_STEPS;H_CHANGING_THE_SIZE_OF_AN_ICON_STEPS;',0)} See related topics

Deleting a set of SmartIcons

1. Choose File - User Setup - SmartIcons Setup.



2. Click Delete Set.
3. For Bar(s) of SmartIcons to, select the set of SmartIcons you want to delete.
4. Click OK.
5. Click Yes to confirm the deletion.
6. Click OK.

Caution If you delete a set of SmartIcons, you can't undo the deletion.

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_EDITING_AN_ICON_STEPS;H_CREATING_AN_ICON_SET_STEPS;',0)} See related topics

Displaying SmartIcons

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

Details: Editing an existing icon

Editing your icons

You can customize icons to look and behave the way you want them to. For example, let's say you want to start an application or a macro with a customized icon or want to attach a script to a customized icon. Simply edit an existing icon, save it with a name you specify, and follow the appropriate steps to associate the icon the way you want to.

{button ,AL(`H_EDITING_AN_ICON_STEPS',1)} Go to procedure

Editing an existing icon

To edit an existing icon, first copy a standard Organizer icon from the Available icons (drag to add) list and rename it. When you've done this, you can edit the new custom icon any way you want.

1. Choose File - User Setup - SmartIcons Setup.

2. Click Edit Icon.
3. From the Available icons you can edit or copy list, select the icon you want to edit.
4. Select the mouse button colors drop-down boxes for Left and Right and select colors and make changes to the icon.
5. (Optional) For Description, enter a description of the icon that will appear next to your icon and what appears as a description when you use Bubble Help.
6. Click Done when you're done editing the icon.
7. Click Yes to save your changes.

   The Save As dialog box appears.
8. For File name, type the name you want to give the edited icon.
9. Click Save.
10. Click OK.

{button ,AL(`H_EDITING_AN_ICON_DETAILS',1)} See details

{button ,AL(`H_SELECTING_AN_ICON_STEPS;H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_CHANGING_THE_SIZE_OF_AN_ICON_STEPS;H_ATTACHING_A_SCRIPT_TO_AN_ICON_STEPS',0)} See related topics

Hiding a set of SmartIcons

1. Click  (the drop-down arrow) located in the top left corner of the SmartIcon bar.
2. Select the appropriate command.

{button ,AL(`H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_SHOWING_A_HIDDEN_SET_OF_SMARTICONS_STEPS',0)} See related topics

Hiding a set of SmartIcons

Option	Result
Hide this bar of SmartIcons	Hides the set of SmartIcons that is marked with a check at the bottom of the drop-down menu, for example, Universal.
Hide all SmartIcons	Hides all sets of SmartIcons available to you in Organizer.
SmartIcons Setup	Opens the SmartIcons Setup dialog box.

Note The last two items in the menu are the last sets of SmartIcons you selected to display.

Selecting an icon

To use SmartIcons, position your mouse pointer on the icon and click the left mouse button.

Tip To find out the function of an icon, move the mouse pointer to the icon. A short description in a bubble, called Bubble Help, appears for each icon.

{button ,AL(`H_EDITING_AN_ICON_STEPS;H_CHANGING_THE_SIZE_OF_AN_ICON_STEPS;H_ADDING_AN_ICON_TO_THE_DEFAULT_PALETTE_STEPS',0)} See related topics

Selecting Attach Script options

Option	Result
Run a Script (*.lss)	Attaches a LotusScript file (.LSS) to a custom icon to run a script.
Run an application (*.bat, *.com, *.exe, *.pif)	Attaches an executable program file, such as a .BAT or .EXE, to a custom icon to start an application.

Selecting the size of your icons

Option	Result
Regular	Displays default size icons.
Large	Displays icons approximately twice the size of default size icons

Showing a hidden set of SmartIcons

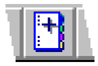
If you have hidden your set of SmartIcons, follow the procedure below to display them again.

1. Choose File - User Setup - SmartIcons Setup.
2. Click OK.

{button ,AL(`H_CHANGING_THE_DISPLAY_OF_YOUR_SMARTICONS_STEPS;H_HIDING_A_SET_OF_SMARTICONS_STEPS',0)} See related topics

Details: Adding a section

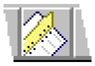
Adding a section in other ways

You can also click  to add an Organizer section.

{button ,AL(`H_ADDING_A_SECTION_STEPS',1)} Go to procedure

Adding a section

1. Choose Section - Customize.



2. Under Tabs, click the section below which you want the new section tab to appear.
3. Click Add.
4. Click the Section type drop-down box and select the type of section you want to add.
5. For Section name, enter a name for the section you want to add.
6. Click OK.

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

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

{button ,AL(`H_ADDING_A_SECTION_DETAILS',1)} See details

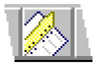
{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS',0)} See related topics

Aligning your pictures on the page

Option	Result
Horizontal Left	Aligns picture along the left side of the page (default).
Horizontal Right	Aligns picture along the right side of the page.
Horizontal Center	Aligns picture in the center of the page.
Vertical Top	Places picture at the top of the page (default).
Vertical Center	Places picture in the center of the page.
Vertical Bottom	Places picture at the bottom of the page.

Changing the size or width of section tabs

1. Choose Section - Customize.

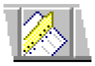


2. Click the Book tab.
3. Under Tab preferences, select the appropriate options.
4. Click OK.

{button ,AL(`H_ADDING_A_SECTION_STEPS;H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;',0)} See related topics

Changing the color of a section tab

1. Choose Section - Customize.

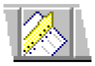


2. Under Tabs, click the section whose tab you want to change.
3. Click the Color drop-down box and select the color you want for the section tab.
4. Click OK.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;;H_ADDING_A_SECTION_STEPS',0)} See related topics

Changing the appearance of your binder

1. Choose Section - Customize.



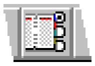
2. Click the Book tab.
3. Under Binder, click the Color drop-down box to select the color you want.
4. Click the Texture drop-down box to select the texture pattern for your binder.
5. Click OK.

{button ,AL(`H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS',0)} See related topics

Changing the font size for all Organizer sections

The font size you select appears throughout your Organizer section.

1. Choose Section - Customize.



2. Click the Fonts tab.
3. Under Font Size, select the appropriate options.
4. Click OK.

Note Using Section - Customize and the Fonts tab changes the font size for all of your entries in all sections; however, in Notepad, you can change font sizes and the appearance of any selected text without affecting other Organizer sections.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_DISPLAY_OPTIONS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS;H_CHANGING_THE_DISPLAY_OF_LINKS_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_DATE_AND_TIME_DISPLAY_STEPS',0)} See related topics

Changing the name of a section

1. Choose Section - Customize.
2. Under Tabs, select the section whose name you want to change.
3. Click Rename.
4. For New name, enter the new name you want to assign to the section.
5. Click OK.

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

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;',0)} See related topics

Changing the order of sections

1. Choose Section - Customize.

2. Under Tabs, select the section you want to move.
3. Click Up or Down.

   The section moves up or down in the list.
4. Click OK.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;',0)} See related topics

Details: Placing a picture on a section-tab page

Selecting the front or back side
Each section-tab page has a front and back side. You can place a picture on either the front or the back side or both. The default is to display the settings for the Front picture. If you placed a picture on the back side, select Back to see the settings.

Selecting the picture source
You can select a picture from a file or from Clipboard. If you select a picture from a file, the file must be on one of your available paths. (The default is no picture.) Once you select a picture, the default changes to keep the current picture.

{button ,AL(`H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS',1)} Go to procedure

Placing a picture on a section-tab page

You can place a picture on a section-tab page from a file on any of your available paths or from a bitmap you've pasted to Clipboard.

1. Choose Section - Customize.

2. Under Tabs, select the section-tab page you want the picture to appear on.

   For example, if you want your picture to appear on the To Do section-tab page, select To Do.
3. Click Picture.
4. Under Side, select Front or Back for which side of the page you want the picture to appear on.

   See details
5. Under Get picture from, select an option for where the picture will come from.

   If necessary, click Browse to select a file.
6. Under Position, select an option for where you want the picture to appear on the page.
7. Under Sizing, select the appropriate options.
8. Click Align to select the appropriate options to align the picture on the section-tab page.
9. Click OK.
10. Click OK.
11. Click OK.

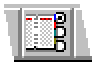
{button ,AL(`H_CHANGING_THE_PICTURE_FOR_A_SECTION_DETAILS',1)} See details

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;',0)} See related topics

Changing alarm preferences

By default, Organizer displays alarms that you missed; the missed alarms appear when you re-open Organizer. You can select the tune to play for alarms.

1. Choose File - User Setup - Organizer Preferences.



2. Click the Environment tab.
3. Under Display, select the Display missed alarms option to turn on or off the display of missed alarms.

   If this option is checked (default), missed alarms are displayed when you re-open Organizer.
4. Click the Favorite alarm tune drop-down box and select a tune to play for alarms.
5. Click OK.

{button ,AL(`H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_MOUSE_POINTER_PREFERENCES_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Changing the font size for all Organizer sections

Option	Result
Default	Displays text in 8 point size.
Medium	Displays text in 10 point size.
Large	Displays text in 12 point size.
Scale with window size	For any font size you select, this setting maintains the correct shape and proportion of all text you enter.

Details: Including sections from other Organizer files

Including a section in other ways
You can also choose Section - Customize and click Include to include a section. Then, enter the name of the file that contains the section, select the section, and enter a name for the section tab.

Sharing files with multi-user access
If you and your colleagues share sections, the files containing those sections must be saved in the same location. For example, the files might be saved on a network server.

The files whose sections you want to include must be saved with multi-user access. To change this for an existing file, choose File - Save As, and select the Multi-user access Lotus Organizer (*.OR3) option. If you want to include a section from a file that's been protected with a password, you must enter a password when prompted.

Using the Tab name text box when including sections
The Tab name text box lets you customize the tab for the included section by assigning it any name you want. You may find using the initials of someone's name is especially helpful if you include sections from many different users' Organizer files, as you will always know exactly whose included section you are seeing.

For example, you may need to include Lucille Yen's Calendar section in your Organizer file. Name the newly included Calendar section with the initials LY to distinguish it from other included Calendar sections you may have.

Changing included sections
You can make changes to an included section if its original file was not password-protected or if you entered either the Assistant or Owner password when you included the section. If the information in an included section changes in the originating file, you'll see the change in the included section.

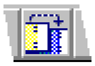
Tip Press F9 to update all entries in an Organizer file. If you include a section that many users access, press F9 while you work in the included section to see the section's most recent changes.

{button ,AL(`H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS',1)} Go to procedure

Including sections from other Organizer files

You can include sections from another file in your own file, if both files are in the same location, for example, on a network server. By including sections, you can share information among users.

1. Choose Section - Include.



2. For From, enter the name of the file from which you want to include a section.

   See details

   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.

   See details

5. Click OK.

Note You can only include a section from another file if that file was saved as multi-user access. If you're including a section from a password-protected file, you'll be prompted for a password.

{button ,AL(`H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_DETAILS',1)} See details

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_SPECIFYING_WHO_CAN_ACCESS_YOUR_FILES_STEPS',0)} See related topics

Opening your binder to a section

You can choose where you want your binder to open each time you open your Organizer file.

1. Choose Section - Customize.

2. Click the Book tab.
3. Click the Open to drop-down box and select where you want to open to.

   The default is to open to Today in Calendar or to the Organizer front cover, if no Calendar section exists.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;',0)} See related topics

Overview: Customizing your Organizer binder and sections

You can customize your Organizer binder and sections in a number of ways. You can do the following activities:

- Add, remove, or rename sections.
- Include sections from other Organizer files.
- Change the order of sections.
- Change the color and size of section tabs.
- Place pictures on section-tab pages.
- Change the color and texture pattern of your binder.
- Open to the section you want each time you open the file.
- Change the font size that appears throughout your Organizer sections.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_REMOVING_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_THE_ORDER_OF_SECTIONS_STEPS;H_OPENING_YOUR_BINDER_TO_A_SECTION_STEPS;',0)} See related topics

Removing a section

1. Choose Section - Customize.

2. Under Tabs, select the section you want to remove.
3. Click Remove.

   You will be asked to confirm or cancel your action.
4. Click Yes to remove the section.

   The section you removed is no longer listed under Tabs.
5. Click OK.

Caution Be sure to remove the correct section. All information within the section you remove will be deleted and can't be recovered.

{button ,AL(`H_CHANGING_THE_COLOR_OF_YOUR_BINDER_STEPS;H_ADDING_A_SECTION_STEPS;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_CHANGING_THE_APPEARANCE_OF_A_SECTION_TAB_STEPS;H_CHANGING_THE_PICTURE_FOR_A_SECTION_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_REMOVING_A_PASSWORD_STEPS',0)} See related topics

Selecting the picture position

Option	Result
Logo	Places the picture within the top portion, the logo area, of the page.
Whole page	Places the picture within the whole page.

Selecting the picture source

Option	Result
File	Selects a picture from a file on one of the available paths.
Clipboard	Selects the picture you pasted to Clipboard.
Default	Selects no picture.
Keep current	Keeps the current picture.

Sizing the picture for a section

Option	Result
Original size	Maintains the original size of the picture.
Fit to page	Enlarges the picture to fit within the page margins.
Percentage	Scales the file picture reduced or enlarged by the percent you specify. (100% is the default.)
Maintain aspect ratio	Maintains the shape and proportion of the graphics so that the picture doesn't distort when its original size is enlarged or reduced.

Using section tabs

Option	Results
Size to name	Makes the section tab only as large as the section name (default).
Overlap by	Overlaps the section tabs the amount you specify. (15% is the default.)
Width	Makes the width of the section tabs narrow, medium (default), or wide.

Address layouts

Address Card	Full Address Card
Address Card (Rolodex)	Label
Contact Card	Phone List
Envelope	

Anniversary layouts

Anniversary List	Daily Trifold Deluxe Timeline
Daily Trifold Deluxe List	Monthly Anniversary

Calendar layouts

Calendar List	Daily Trifold List
Daily Calendar/To Do	Daily Trifold Timeline
Daily Calendar/To Do/Calls	Monthly Calendar
Daily Page	Weekly 2-Page
Daily Timeline	Weekly Timeline
Daily Trifold Deluxe List	Weekly Work Timeline
Daily Trifold Deluxe Timeline	Yearly Calendar

Calls layouts

Calls Card	Daily Trifold Deluxe List
Calls List	Daily Trifold Deluxe Timeline
Daily Calendar/To Do/Calls	Monthly Calls

Details: Mapping sections

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout part
The parts of the layout are the different areas in which each section's information is printed. Under For part of layout, select the part to which you want to map a section. For example, if your Organizer file has both your To Do section and your manager's To Do section, select the To Do part. The Use information from list box now shows both To Do sections. Select the To Do section you want to print.

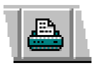
{button ,AL(`H_MAPPING_SECTIONS_STEPS',1)} Go to procedure

Mapping sections

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

However, if you choose a trifold layout, you need to specify (map) which section (your To Do tasks or your manager's To Do tasks) you want to print. If you don't specify mapping, Organizer prints each section that appears first in the Organizer file. That is, if your To Do tab appears before the To Do tab for your manager, Organizer will print your To Do tasks unless you map the manager's To Do tasks as the section to print.

1. Choose File - Print.



2. Click the Sections drop-down box and select the Calendar, To Do, Planner, or Anniversary section.
3. Click the Layouts drop-down box and select one of the layouts.
4. Click Sections.

   Note If Sections (in the Print dialog box) is dimmed, you didn't select a print layout that combines information from more than one section. Click the Layout box and select a layout.
5. Under For part of layout, select the part of the layout to which you want to map a section.

   See details
6. Under Use information from, select the section you want printed.
7. Click OK to return to the Print dialog box.
8. Click OK to start printing.

{button ,AL(`H_MAPPING_SECTIONS_DETAILS',1)} See details

{button ,AL(`H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_INFORMATION_FOR_DIFFERENT_DATEBOOKS_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_DIFFERENT_LAYOUTS_STEPS',0)} See related topics

Notepad layouts

Overview: Paper types

When you're ready to print, you'll select the Organizer section you want to print (or any information from the section), the layout (or how you want your information to appear on the printed output), and the paper type (or the paper size) you want to print to. When you select a paper type, you're choosing the size and style of the paper upon which your information will appear. For example, you can select a paper size, such as an 8 1/2 x 11" letter paper size, a Rolodex card size, an 8 1/2 x 14" legal paper size, or you can customize a paper size. If you decide to customize your paper type, you can adjust the paper size, margins, spacing, and more.

The following table lists all Organizer paper types:

2x10-Labels 1 x 4 in	DayRunner-Classic
2x3-Labels 3 1/3 x 4 in	DayRunner-Entrepreneur
2x4-Rolodex 2 1/6 x 4 in	DayRunner-Running Mate
2x5-Labels 2 x 4 in	Day-Timer Junior Desk
2x7-Labels 1 1/3 x 4 in	Day-Timer Junior Pocket
3x10-Labels 1 x 2 5/8 in	Day-Timer Senior Desk
A4 210 x 297 mm	Day-Timer Senior Pocket
A5 148 x 210 mm	Deluxe #190011 8 1/2 x 11 in
Avery #41207 3 3/4 x 6 3/4 in - Portrait	Deluxe #190012 5 1/2 x 8 1/2 in - Portrait
Avery #41257 3 3/4 x 6 3/4in - Landscape	Deluxe #190013 5 1/2 x 8 1/2 in - Landscape
Avery #41308 5 1/2 x 8 1/2 in - Portrait	Deluxe #190014 3 3/4 x 6 3/4 in
Avery #41358 5 1/2 x 8 1/2 in - Landscape	Envelope #10 4 1/8 x 9 1/2 in
Avery L7159 (24)	Envelope #9 3 7/8 x 8 7/8 in
Avery L7162 (16)	Filofax
Avery L7163 (14)	Franklin Day Planner Classic - Portrait
Avery L7666	Franklin Day Planner Classic - Landscape
Avery L7901 (Filofax)	Franklin Day Planner Monarch
Avery L7902 (A5)	Legal 8 1/2 x 14 in
B5 176 x 250 mm	Letter 8 1/2 x 11 in
	Time Manager

Overview: Printing your Organizer information

Organizer lets you print your Organizer information (or the entries you created) in a variety of professional ways: you can print your work to fit a day-planner you use (for example, a Franklin Day Planner Classic or DayRunner Classic), or you can customize your own look. You can combine information from several Organizer sections, print only one section, or print parts of a section. Organizer provides you with many options for how to print your Organizer information.

You can also print Organizer information to take with you when you travel. For example, you can carry your Organizer information in a paper day-planner in order to keep track of your appointments, tasks, addresses, events, notes, calls, and special dates, or you can print only your day's appointments and responsibilities, so you can take them to a meeting.

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

{button ,AL(`H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER;H_OVERVIEW_PRINT_LAYOUTS_OVER;H_OVERVIEW_PAPER_TYPES_OVER;',0)} See related topics

Overview: Organizer print layouts

What you print reflects the layout you select rather than what you see on your computer screen. A print layout is that which lets you customize what you want to see printed. That is, you can select a print layout that prints your information as you would like to see it. Organizer includes many predefined layouts, with specific layouts associated with each Organizer section. For example, you can

- Use a label layout to print your Address records
- Use the Monthly Calendar layout to print your Calendar appointments
- Select a layout that prints information from more than one Organizer section
- Select a layout that matches your paper datebook (for example a Franklin Day Planner Classic or DayRunner Classic).

In most cases you won't need to change the predefined layouts; however, you can customize these layouts if you want to.

The following tables list all Organizer layouts by section. You can see illustrations of these layouts in the Layouts dialog box. (Choose File - Print. Click Layouts. When you select a layout, a small illustration of that layout appears in the dialog box.) You can also see these illustrations in *Print Layouts Guide*.

Calendar

Calendar List	Daily Trifold List
Daily Calendar/To Do	Daily Trifold Timeline
Daily Calendar/To Do/Calls	Monthly Calendar
Daily Page	Weekly 2-Page
Daily Timeline	Weekly Timeline
Daily Trifold Deluxe List	Weekly Work Timeline
Daily Trifold Deluxe Timeline	Yearly Calendar

To Do

Calendar List	Daily Trifold List
Daily Calendar/To Do	Daily Trifold Timeline
Daily Calendar/To Do/Calls	Monthly Calendar
Daily Page	Weekly 2-Page
Daily Timeline	Weekly Timeline
Daily Trifold Deluxe List	Weekly Work Timeline
Daily Trifold Deluxe Timeline	Yearly Calendar

Address

Address Card	Full Address Card
Address Card (Rolodex)	Label
Contact Card	Phone List
Envelope	

Calls

Calls Card	Daily Trifold Deluxe List
Calls List	Daily Trifold Deluxe Timeline
Daily Calendar/To Do/Calls	Monthly Calls

Planner

Daily Trifold Deluxe List	Planner List
Daily Trifold Deluxe Timeline	Quarterly Planner
Monthly Planner	Yearly Planner

Notepad

Notepad Contents	Notepad Pages

Notepad Contents and Pages

Anniversary

Anniversary List

Daily Trifold Deluxe List

Daily Trifold Deluxe Timeline

Monthly Anniversary

Paper types available in Organizer

2x10-Labels 1 x 4 in	DayRunner-Classic
2x3-Labels 3 1/3 x 4 in	DayRunner-Entrepreneur
2x4-Rolodex 2 1/6 x 4 in	DayRunner-Running Mate
2x5-Labels 2 x 4 in	Day-Timer Junior Desk
2x7-Labels 1 1/3 x 4 in	Day-Timer Junior Pocket
3x10-Labels 1 x 2 5/8 in	Day-Timer Senior Desk
A4 210 x 297 mm	Day-Timer Senior Pocket
A5 148 x 210 mm	Deluxe #190011 8 1/2 x 11 in
Avery #41207 3 3/4 x 6 3/4 in - Portrait	Deluxe #190012 5 1/2 x 8 1/2 in - Portrait
Avery #41257 3 3/4 x 6 3/4in - Landscape	Deluxe #190013 5 1/2 x 8 1/2 in - Landscape
Avery #41308 5 1/2 x 8 1/2 in - Portrait	Deluxe #190014 3 3/4 x 6 3/4 in
Avery #41358 5 1/2 x 8 1/2 in - Landscape	Envelope #10 4 1/8 x 9 1/2 in
Avery L7159 (24)	Envelope #9 3 7/8 x 8 7/8 in
Avery L7162 (16)	Filofax
Avery L7163 (14)	Franklin Day Planner Classic - Portrait
Avery L7666	Franklin Day Planner Classic - Landscape
Avery L7901 (Filofax)	Franklin Day Planner Monarch
Avery L7902 (A5)	Legal 8 1/2 x 14 in
B5 176 x 250 mm	Letter 8 1/2 x 11 in
	Time Manager

Planner layouts

Daily Trifold Deluxe List	Planner List
Daily Trifold Deluxe Timeline	Quarterly Planner
Monthly Planner	Yearly Planner

Details: Printing names and addresses

Keyboard Shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected. For example, the layouts for addresses include envelope, label, and phone list.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, or a customized paper type, such as Rolodex cards, Avery labels, or Franklin DayPlanner.

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

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

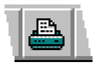
Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

{button ,AL(`H_PRINTING_ADDRESS_RECORDS_STEPS',1)} Go to procedure

Printing names and addresses

Organizer prints addresses in the order in which you sorted them. Set the sort order you want before you start printing.

1. Choose File - Print.



2. Click the Section drop-down box and select Address.
3. Click the Layout drop-down box and select a layout for how you want the printed information to appear.

   See details
4. If necessary, click the Paper drop-down box and select a paper type.

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

   See details
6. Click Layouts.
7. Under Preferences select the appropriate options to specify how much of the address information you want printed.
8. Click OK to return to the Print dialog box.
9. Under Range, select the option for the address records you want to print.
10. (Optional) For Copies, enter the number of copies you want to print: 1 - 99.

    You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.
11. Click OK to start printing.

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

{button ,AL(`H_PRINTING_ADDRESS_RECORDS_DETAILS',1)} See details

{button ,AL(`H_SORTING_ADDRESSES_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_CHANGING_THE_ADDRESS_ENVELOPE_AND_OR_LABEL_FORMAT_STEPS;',0)} See related topics

Details: Printing anniversaries, birthdays, and other special dates

Keyboard Shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists the layouts designed for the Anniversary section. There are four Anniversary layouts: Anniversary List, Daily Trifold Deluxe List, Daily Trifold Deluxe Timeline, and Monthly Anniversary.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, labels, or a customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

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

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under For part of layout, select the part of the layout to which you want to map a section. Under Use information from, select the section whose entries you want printed in the layout part you just selected.

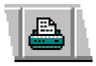
If you don't specify mapping, Organizer prints each section that appears first in your Organizer. For example, Organizer would print your To Do section if its tab appears first, or your manager's To Do section if you manager's tab appears first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_PRINTING_ANNIVERSARIES_STEPS',1)} Go to procedure

Printing anniversaries, birthdays, and other special dates

1. Choose File - Print.



2. Click the Section drop-down box and select Anniversary.
3. Click the Layout drop-down box and select a layout for how you want the printed information to appear.

   See details
4. If necessary, click the Paper drop-down box and select a paper type.

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

   See details
6. Under Range, select the option for the range of dates you want to print.
7. (Optional) For Copies, enter the number of copies you want to print: 1 through 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections to specify how you want to map the Organizer sections and click OK.

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

   See details
9. Click OK to start printing.

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

{button ,AL(`H_PRINTING_ANNIVERSARIES_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing information in any Organizer section

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

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

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several sections on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Planner, Calls, and Anniversary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, labels, or a customized paper for a hardcopy datebook, such as the Franklin DayPlanner .

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

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under For part of layout, select the part of the layout to which you want to map a section. Under Use information from, select the section whose entries you want printed in the layout part you just selected.

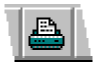
If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',1)} Go to procedure

Printing information in any Organizer section

1. Choose File - Print.



2. Click the Section drop-down box and select the Organizer section that has the entries you want to print.
3. Click the Layout drop-down box and select a layout for how you want the printed information to appear.

   See details
4. If necessary, click the Paper drop-down box and select a paper type.

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

   See details
6. Under Range, select the option for the range of information you want to print.
7. (Optional) For Copies, enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer sections, and click OK.

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

   See details
9. Click OK to start printing.

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

{button ,AL(`H_PRINTING_ANY_ORGANIZER_SECTION_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_DETAILS',0)} See related topics

Details: Printing your daily, weekly, or monthly calendar

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

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

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several sections on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Planner, Calls, and Anniversary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be standard 8 1/2 by 11" paper, or a customized paper for a hardcopy datebook, such as the Franklin DayPlanner or DayRunner Running Mate.

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

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, If you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under For part of layout, select the part of the layout to which you want to map a section. Under Use information from, select the section whose entries you want printed in the layout part you just selected.

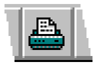
If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_PRINTING_CALENDAR_APPOINTMENTS_STEPS',1)} <u>Go to procedure</u>

Printing your daily, weekly, or monthly calendar

1. Choose File - Print.



2. Click the Section drop-down box and select Calendar.
3. Click the Layout drop-down box and select the layout for how you want the printed information to appear.

   See details
4. If necessary, click the Paper drop-down box and select a paper type.

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

   See details
6. Under Range, select the option for the range of information you want to print.
7. (Optional) For Copies, enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer sections and click OK.

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

   See details
9. Click OK to start printing.

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

{button ,AL(`H_PRINTING_CALENDAR_APPOINTMENTS_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing Calls entries

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected. For example, the layouts for Calls entries include Calls Card, Calls List, and Monthly Calls.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, labels, or a customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

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

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under For part of layout, select the part of the layout to which you want to map a section. Under Use information from, select the section whose entries you want printed in the layout part you just selected.

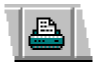
If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_PRINTING_CALLS_STEPS',1)} Go to procedure

Printing Calls entries

1. Choose File - Print.



2. Click the Section drop-down box and select Calls.
3. Click the Layout drop-down box and select the layout for how you want the printed information to appear.

   See details
4. If necessary, click the Paper drop-down box and select a paper type.

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

   See details
6. Under Range, select the option for the Calls entries you want to print.
7. (Optional) For Copies, enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer sections, and click OK.

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

   See details
9. Click OK to start printing.

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

{button ,AL(`H_PRINTING_CALLS_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing information for different paper datebooks

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies which the type of datebook for which you're printing information, and the size of the paper. Some of the datebook papers you can choose from are DayRunner, Franklin Day Planner, and Time Manager.

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

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

{button ,AL(`H_PRINTING_INFORMATION_FOR_DIFFERENT_DATEBOOKS_STEPS',1)} Go to procedure

Printing information for different paper datebooks

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

1. Choose File - Print.

2. Click the Section drop-down box and select the Organizer section that has the entries you want to print.
3. Click the Layout drop-down box and select a layout for how you want the printed information to appear.

   See details
4. Click the Paper drop-down box and select the manual datebook page you want to print, such as Franklin Day Planner Classic (L).

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

   See details
6. Under Range, select the option for the range of information you want to print.
7. Place the paper datebook pages in your printer.

   See your printer documentation for instructions on how to place paper in the printer.
8. Click OK to start printing.

{button ,AL(`H_PRINTING_INFORMATION_FOR_DIFFERENT_DATEBOOKS_DETAILS',1)} See details

{button ,AL(`;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_CALENDAR_APPOINTMENTS_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SELECTING_DIFFERENT_LAYOUTS_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Printing Notepad pages

Keyboard Shortcut
You can also press CTRL+P to display the Print dialog box.

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected. There are three Notepad layouts: Notepad Contents, Notepad Contents and Pages, and Notepad Pages.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 by 11" paper, or a customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

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

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

{button ,AL(`H_PRINTING_NOTEPAD_PAGES_STEPS',1)} Go to procedure

Printing Notepad pages

1. Choose File - Print.

2. Click the Section drop-down box and select Notepad.
3. Click the Layout drop-down box and select the layout for how you want the information printed.

   See details
4. If necessary, click the Paper drop-down box and select a paper type.

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

   See details
6. Under Range, select the option for the range of Notepad pages you want to print.
7. (Optional) For Copies, enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.
8. Click OK to start printing.

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

{button ,AL(`H_PRINTING_NOTEPAD_PAGES_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing Planner events

Keyboard Shortcut
You can also press CTRL+P to display the Print dialog box.

Printing shown-through entries
If you've shown entries from the Calendar section in Planner, Organizer will print the shown through items as well as your Planner events.

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several sections on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Planner, Calls, and Anniverary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 x 11" paper, or a customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

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

Single-sided and double-sided printing
Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, if you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under For part of layout, select the part of the layout to which you want to map a section. Under Use information from, select the section whose entries you want printed in the layout part you just selected.

If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_PRINTING_PLANNER_EVENTS_STEPS',1)} Go to procedure

Printing Planner events

1. Choose File - Print.

2. Click the Section drop-down box and select Planner.
3. Click the Layout drop-down box and select a layout for how you want the information printed.

   See details
4. If necessary, click Paper drop-down box and select a paper type.

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

   See details
6. Under Range, select the options for the range of information you want to print.
7. (Optional) For Copies, enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer section, and click OK.

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

   See details
9. Click OK to start printing.

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

{button ,AL(`H_PRINTING_PLANNER_EVENTS_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing To Do tasks

Keyboard shortcut

You can also press CTRL+P to display the Print dialog box.

Selecting a layout

A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several sections on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Planner, Calls, and Anniverary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type

The paper type specifies the size, and sometimes the type, of the paper on which you're printing. For example, the paper type can be 8 1/2 x 11" paper, or a customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

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

Single-sided and double-sided printing

Single-sided printing prints on only one side of the paper. This is the default for printing Organizer entries.

Double-sided printing prints on both the front and back of the paper. If you select double-sided printing, click Options. Under Double sided, select the appropriate option.

Mapping sections

Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, If you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under For part of layout, select the part of the layout to which you want to map a section. Under Use information from, select the section whose entries you want printed in the layout part you just selected.

If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

If OK is dimmed

If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_PRINTING_TO_DO_TASKS_STEPS',1)} Go to procedure

Printing To Do tasks

1. Choose File - Print.

2. Click the Section drop-down box and select To Do.
3. Click the Layout drop-down box and select a layout for how you want the printed information to appear.

   See details
4. If necessary, click the Paper drop-down box and select a paper type.

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

   See details
6. Under Range, select the option for the range of information you want to print.
7. (Optional) For Copies, enter the number of copies you want to print: 1 - 99.

   You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.
8. (Optional) If you selected a print layout that prints multiple sections (one of the trifold layouts), click Sections, select how you want to map the Organizer sections, and click OK.

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

   See details
9. Click OK to start printing.

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

{button ,AL(`H_PRINTING_TO_DO_TASKS_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',0)} See related topics

Details: Printing your day's scheduled activities

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

Mapping sections
Mapping sections is important when you include more than one of the same sections in your Organizer file to print. For example, If you included both your manager's and your own To Do section as part of your Organizer file and you print with a trifold layout, you can specify whether you want to print your manager's To Do section or your own To Do section.

In the Sections dialog box, under For part of layout, select the part of the layout to which you want to map a section. Under Use information from, select the section whose entries you want printed in the layout part you just selected.

If you don't specify mapping, Organizer prints each section that appears first in your Organizer file. For example, Organizer would print your To Do section if its tab appeared first, or your manager's To Do section if your manager's tab appeared first. You can't print both sections in the same layout.

{button ,AL(`H_PRINTING_YOUR_SCHEDULE_STEPS',1)} Go to procedure

Printing your day's scheduled activities

The first thing you may want to do on a typical work day is start Organizer and print your scheduled activities for the day. Let's say you want to print your Calendar, To Do, and Calls entries all on one 8 1/2 x 11" piece of paper.

1. Choose File - Print.

2. Click the Section drop-down box and select Calendar.
3. Click the Layout drop-down box and select Daily Calendar/To Do/Calls.
4. Click the Paper drop-down box and select Letter 8 1/2 x 11".
5. Select Single sided.
6. Under Range, specify the current date for From and To, or click the From and To drop-down boxes and select the current date.
7. (Optional) Click Sections, select how you want to map the Organizer sections, and click OK .

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

   See details
8. Click OK to start printing.

{button ,AL(`H_PRINTING_YOUR_SCHEDULE_DETAILS',1)} See details

{button ,AL(`;H_MAPPING_SECTIONS_STEPS;H_OVERVIEW_LAYOUTS_OVER;H_OVERVIEW_PAPER_TYPES_OVER;H_OVERVIEW_PRINT_LAYOUTS_OVER;H_OVERVIEW_PRINTING_YOUR_ORGANIZER_INFORMATION_OVER;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',0)} See related topics

Details: Selecting a different layout

Keyboard shortcut
You can also press CTRL+P to select a different layout.

Selecting a layout
A layout determines how the printed information will appear. In the drop-down box, Organizer lists layouts that are designed for the Organizer section you selected. Some layouts are also designed to combine several section on one printout. For example, one of the trifold layouts prints the Calendar, To Do, Planner, Calls, and Anniversary entries all on one page.

To see an illustration of the layout you selected, click Layouts (in the Print dialog box). The illustration appears next to the Preferences group box in the Layout dialog box. Click OK to return to the Print dialog box.

Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.

Selecting a paper type
The paper type specifies the size, and sometimes the type, of paper on which you're printing. For example, the paper type can be 8 1/2 x 11" paper, labels, or a customized paper for a hardcopy datebook, such as the Franklin DayPlanner.

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

If OK is dimmed
If, after you've made your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_SELECTING_DIFFERENT_LAYOUTS_STEPS',1)} Go to procedure

Selecting a different layout

1. Choose File - Print.

2. Click the Section drop-down box and select the section you want to print.
3. Click the Layout drop-down box and select a layout.
   See details
4. If necessary, click the Paper drop-down box and select a paper type.
   See details
5. Click OK to start printing.

{button ,AL(`H_SELECTING_DIFFERENT_LAYOUTS_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_PRINTING_YOUR_ORGANIZER_INFORMATION_OVER;H_OVERVIEW_PRINT_LAYOUTS_OVER;H_OVERVIEW_LAYOUTS_OVER;',0)} See related topics

Specifying a range of entries

Option	Result
All	Prints all pages in the section you selected.
From and To	Prints entries that fall between a set of dates you specify if you're printing from the Calendar, Planner, Calls, or Anniversary sections; click the From and To drop-down boxes to select the date from the calendar.
	Prints entries that fall alphabetically or sequentially between the letters, names, or numbers you specify if you're printing from the Address or Notepad section; type the letters, names, or numbers in the From and To drop-down boxes.
Selected entries	Prints the entries you selected before you chose File - Print.

Details: Specifying a range of information to print

Keyboard shortcut
You can also press CTRL+P to display the Print dialog box.

{button ,AL(`H_SPECIFYING_A_RANGE_OF_INFORMATION_TO_PRINT_STEPS',1)} Go to procedure

Specifying a range of information to print

1. Choose File - Print.

2. Under Range, select the appropriate options you want.
3. Click OK.

{button ,AL(`H_SPECIFYING_A_RANGE_OF_INFORMATION_TO_PRINT_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Specifying the address records to print

Option	Result
Home	Prints all home address records in the Address section.
From/To	Prints all business address records in the Address section.
Both	Prints both home and business address records in the Address section.
Current	Prints the selected address record (home or business). Select the address record before you choose File - Print.

Stopping printing

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

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',0)} See related topics

To Do layouts

Calendar List	Daily Trifold List
Daily Calendar/To Do	Daily Trifold Timeline
Daily Calendar/To Do/Calls	Monthly Calendar
Daily Page	Weekly 2-Page
Daily Timeline	Weekly Timeline
Daily Trifold Deluxe List	Weekly Work Timeline
Daily Trifold Deluxe Timeline	Yearly Calendar

Details: Archiving information

Keyboard shortcut
You can also press CTRL+A to archive information.

Selecting the section to archive
You can archive more than one section in a single archive file although you must perform a separate archive operation for each of the sections.

For example, you can use File - Archive to archive all Calendar entries in a file named ARCHIVE.OR3, and then use File - Archive again to archive all Calls entries in the same file.

Archiving information
The archive file that Organizer creates uses an .OR3 extension. You can open the archive file using File - Open in Organizer.

The archive file contains all alarms, cost codes, and categories from the original file. Repeating entries still appear in the archive file, but are no longer designated as Repeating or include the repeating entry symbol.

Selecting a date before which to archive
The section you archive from determines the way Organizer uses the date you select. In the Calendar and Anniversary sections, Organizer archives appointments or anniversaries that occur before the date you select. In the To Do section, Organizer archives completed tasks whose due date occurs before the date you select. In the Planner section, Organizer archives events with an end date before the date. In the Calls section, Organizer archives calls made before the date you select. In the Notepad section, Organizer archives notes entered before the date you select.

Compacting the Organizer file
If you select the Compact file after archive option, Organizer compacts the Organizer file from which you are archiving, reducing the size of the file on disk. If you don't select Compact file after archive, the information from the file is archived, but the file remains the same size.

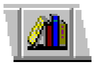
If the file is set for multiple-user access, that is multiple users can read the file at one time, you must be the only user with the file open in order to compact a file.

{button ,AL(`H_ARCHIVING_INFORMATION_STEPS',1)} Go to procedure

Archiving information

To keep a file's size manageable and streamline your Organizer file, you can archive information you don't need on a day-to-day basis. When you archive information, Organizer deletes the archived information from your file and stores it in a separate .OR3 file. You can still access archived information; however, the archived information won't appear in your main Organizer file.

1. Choose File - Archive.



2. If you haven't saved changes to your file, Organizer asks you if you want to save the file. Click the appropriate command button.
3. Click the Section drop-down box and select a section from which to archive entries.

   See details
4. Under Range, select All to archive all entries or click the Before drop-down box to select the date prior to which you want to archive entries.

   See details
5. For Archive file, enter a name for the archive file.
6. (Optional) Select Compact file after archive.

   See details
7. Click OK.

{button ,AL(`H_ARCHIVING_INFORMATION_DETAILS',1)} See details

{button ,AL(`;H_COMPACTING_A_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_STEPS',0)} See related topics

Details: Merging files

Keyboard Shortcut
You can also press CTRL+M to merge files.

Selecting a file to merge
You can either enter the file name in the File name text box or click the Browse button and select the file.

The default file type is Organizer 97 (*.OR3).

Selecting insertions, additions, and deletions
If you don't automatically accept edits, additions, or deletions, Organizer displays a dialog box that lets you select the changes you want to merge into the target file. You can click the tab to go to the page where edits, additions, and deletions appear.

Under Edits, Organizer lists all edits you made in the source file and the corresponding entry in the target file. By default, all edits are selected. To select individual edits to merge, click Deselect all and then select each individual edit. If you want to keep your original entry in the target file, select it instead. If you want, you can include both the edited entry and the original entry in the target file. Select the entries in both the source and target file list. Organizer adds the edited entry as a new entry in the target file.

Under Additions, Organizer lists all additions you made to the source file. By default, all your additions are selected. To select individual additions to merge, click Deselect all and then select each individual addition.

Under Deletions, Organizer lists all deletions you made in the source file. By default, all deletions are selected. To select individual deletions to merge, click Deselect all and then select each individual deletion.

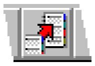
Merging archived files
You can't use File - Merge with archive files. This means you can't merge an archive file into the current file, nor can you merge another file into an archive file.

{button ,AL(`H_MERGING_FILES_STEPS',1)} Go to procedure

Merging files

To combine and consolidate entries, you can merge a file.

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



3. For File name, select a source file to merge into the target file.

   See details

4. Under Automatically accept, select the appropriate options to indicate which changes and additions from the source file you want to be automatically entered in the target file.
5. Click Merge.
6. (Optional) If you aren't automatically accepting changes and additions, Organizer displays a dialog box with different tabs that lists each edit, addition, and deletion. You can look through these changes and additions, select the ones you want to appear in the target file, and click OK when you finish selecting your changes.

   See details

7. If necessary, click OK.

{button ,AL(`H_MERGING_FILES_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_COPYING_FILES_FROM_A_NETWORK_TO_A_LAPTOP_STEPS',0)} See related topics

Overview: Merging files

To combine and consolidate entries, you can merge a file, referred to as the "source file," with your current file, called the "target file." For example, you can use your Organizer file on a notebook computer, and merge the notebook computer file with your network computer file when you return to the office.

The files you merge must share the same origin -- that is, the two files must originally be copies of each other. Organizer merges only additions, deletions, and edits to entries in sections (for example, an edited appointment or added To Do task). Any other settings (such as password changes or changes to section preferences) won't be merged.

Selecting automatically accept options

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

Assigning styles to Notepad pages

Option	Result
Start a chapter	Establishes a chapter beginning with this page.
Links page	Creates a Notepad Links page that displays a list of links you've made between Organizer entries and the Notepad Links page.
Folded	Makes a page a double-width size when you open it; a single-width size when you fold it.
Color	Lets you assign a color to the page.

Assigning categories and confidential status to Notepad pages

Option	Result
Categories	Establishes a category for each Notepad entry. For example, you can select the marketing category for an entry about marketing milestones.
Confidential	Makes or doesn't make (default) the Notepad page confidential, so others accessing your file can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential.

Details: Assigning color to Notepad pages

Using color with Notepad pages

You can assign color to any Notepad pages. You can assign color to those pages that begin new chapters or color code pages of similar information.

For example, you can color code all your Notepad pages that are related to financial information green; you can color code project ideas yellow; you can make travel and vacation information blue, and so on.

{button ,AL(`H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_STEPS',1)} Go to procedure

Assigning color to Notepad pages

You can assign color to any Notepad pages.

1. Create or edit a Notepad page.
2. Under Styles, select Color.
   See details
3. Click OK.

{button ,AL(`H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_CREATING_CHAPTERS_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Customizing alignment

You can align your Notepad page text to fit your specific needs.

1. Go to the Notepad page you've created.
2. Select the text you want to align.
3. Choose Text - Alignment.
4. Select the appropriate options.
5. Click OK.

{button ,AL(`H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS;H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZING_FONTS_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS',0)} See related topics

Details: Customizing fonts

Using Fonts
You can select fonts and their various attributes to suit your specific needs. You can make selections that affect entire Notepad pages of text or that affect only individual letters of a single word. How often and to what extent you want to use fonts and their attributes is entirely up to you.

There are a number of fonts from which to choose, as well as font styles and sizes. Just click the Font, Font style, and Size drop-down boxes and make your selections. By observing the text changes in the Sample box, you'll see how your selections would affect the text on your Notepad page.

Using Effects
Effects can be extremely useful when you want to highlight certain text, when you (or you and a co-worker) are editing text, or when you're just trying out new ideas on-page. You can strikeout text that you don't want to delete quite yet, or you can underline and color text for emphasis.

For example, let's say you and a colleague are creating a marketing announcement for an upcoming event, and you want to use Notepad to sketch out your ideas. Use strikeout to show where each of you has edited text, use underline for text you both agree needs to be in the announcement, and use colored text to highlight any outstanding issues to resolve. Just click Strikeout or Underline when you want to use them, and click the Colors drop-down box to select the color you want.

To further customize the appearance of your text, click the Script drop-down box to select whatever type of script writing you'd like for your text.

By observing the text changes in the Sample box, you'll see how your selections would affect the text on your Notepad page.

{button ,AL(`H_CUSTOMIZING_FONTS_STEPS',1)} Go to procedure

Customizing fonts

You can customize your Notepad text by selecting different fonts and attributes.

1. Go to the Notepad page you've created.
2. Select the text whose fonts you want to change.
3. Choose Text - Font.
4. Select the fonts and attributes you want.
   See details
5. Click OK.

{button ,AL(`H_CUSTOMIZING_FONTS_DETAILS',1)} See details

{button ,AL(`H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS;H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS',0)} See related topics

Customizing how text wraps

You can choose to have text wrap within the Notepad page margins as you type on the Notepad page, or have the text wrap after you have finished typing it. Notepad page text wraps as you type, by default.

1. Go to the Notepad page you've created.
2. Choose Text - Word wrap to toggle off or on the word wrap function.

{button ,AL(`H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS;H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS;H_CUSTOMIZINGFONTS_STEPS',0)} See related topics

Customizing paragraph settings

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

1. Go to the Notepad page you've created.
2. Select the paragraph you want to indent.
3. Choose Text - Paragraph.
4. Select the appropriate options.
5. Click OK.

{button ,AL(`H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS;H_CUSTOMIZINGFONTS_STEPS',0)} See related topics

Details: Customizing tab settings

Using Tabs

The number that appears in the Tab stop position field represents the tab stop position for the current paragraph. You can use a different tab stop position by either typing a new one in the tab stop position field, or by selecting one from the Tab stop position list.

Using Set, Clear, and Clear all

- Click Set to add the specified tab stop position to the Tab stop position list for future use.
- Click Clear to remove the specified tab stop position from the Tab stop position list.
- Click Clear All to remove all tab stop positions from the Tab stop position list.

{button ,AL(`H_CUSTOMIZING_TAB_SETTINGS_STEPS',1)} Go to procedure

Customizing tab settings

Use tabs to position your paragraphs where you want them to appear on your Notepad page.

1. Go to the Notepad page you've created.
2. Select the paragraph you want to set tabs for.
3. Choose Text - Tabs.
4. Select the appropriate options.

   See details

{button ,AL(`H_CUSTOMIZING_TAB_SETTINGS_DETAILS',1)} See details

{button ,AL(`H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS;H_CUSTOMIZINGFONTS_STEPS;H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS',0)} See related topics

Customizing text attributes

You can assign Notepad page text attributes of bold, italic, underline, or strike thru.

1. Go to the Notepad page you've created.
2. Select the text you want to customize.
3. Choose Text - Character.
4. Select the appropriate options.

{button ,AL(`H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TAB_SETTINGS_STEPS;H_CUSTOMIZINGFONTS_STEPS;H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS',0)} See related topics

Customizing with bulleted text

1. Go to the Notepad page you've created.
2. Select the text you want to bullet.
3. Choose Text - Bullet Style.

{button ,AL(`H_CUSTOMIZING_ALIGNMENT_STEPS;H_CUSTOMIZING_TEXT_ATTRIBUTES_STEPS;H_CUSTOMIZINGFONTS_STEPS;H_CUSTOMIZING_PARAGRAPH_SETTINGS_STEPS',0)} See related topics

Details: Deleting a Notepad page

Keyboard shortcuts

You can also press CTRL+X or press DEL to delete a Notepad page.

Deleting a Notepad page in other ways

You can also choose Edit - Cut or click to delete a Notepad page.

{button ,AL(`H_DELETING_A_NOTEPAD_PAGE_STEPS',1)} Go to procedure

Deleting a Notepad page

1. Select the Notepad page you want to delete.
2. Drag and drop the Notepad page to  in Toolbox.

Note To retrieve a deleted Notepad page, choose Edit - Undo Page Delete before you do any other action. You can undo only the last action.

{button ,AL(`H_DELETING_A_NOTEPAD_PAGE_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_EDITING_A_NOTEPAD_PAGE_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Details: Editing a Notepad page

Keyboard shortcuts
You can also press CTRL+E to edit a Notepad page you selected.

Editing Notepad pages in other ways
You can also choose Edit - Edit Page to edit a Notepad page you selected.

Editing information on your Notepad page
You can edit Notepad information in two ways: directly in the Notepad page or in the Edit Page dialog box.

Editing the existing text of your Notepad page
To edit the existing Notepad text, click the page to select it, click the text you want to edit, and make your changes.

To edit text font and paragraph attributes, tabs, bullets, alignment, and so on, select the text you want to change and choose Text and then choose the appropriate command. For example, Text - Fonts, Text - Paragraph, and so on.

When you are done editing, press F2 to confirm your changes.

Adding to fields you previously left blank and options you didn't select
If you want to add information to fields you left blank and select options you've not selected, you need to edit your Notepad page in the Edit Page dialog box. Choose Edit - Page. When the Edit - Page dialog box appears, you can make your changes and click OK to enter your changes.

{button ,AL(`H_EDITING_A_NOTEPAD_PAGE_STEPS',1)} Go to procedure

Editing a Notepad page

1. Double-click the Notepad entry.
2. Edit the Notepad entry.

   See details
3. Click OK.

{button ,AL(`H_EDITING_A_NOTEPAD_PAGE_DETAILS',1)} See details

{button ,AL(`H_ENTERING_TEXT_DIRECTLY_ON_A_NOTEPAD_PAGE_STEPS;H_CUSTOMIZING_ALIGNMENT_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Details: Folding Notepad pages

Using folding Notepad pages

Folded pages are pages you assign a double-width size to to accommodate large or landscape-oriented information, such as embedded OLE objects, spreadsheets, and graphics.

For example, let's say you need to track all costs related to an upcoming marketing event. You create a 1-2-3 spreadsheet and embed the OLE object for the spreadsheet on a folded Notepad page.

{button ,AL(`H_FOLDING_NOTEPAD_PAGES_STEPS',1)} Go to procedure

Folding Notepad pages

Create Folded Notepad pages to accommodate large or landscape-oriented information.

1. Create or edit a Notepad page.
2. Under Style, select Folded.

   See details
3. Click OK.

{button ,AL(`H_FOLDING_NOTEPAD_PAGES_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_LINKING_NOTEPAD_PAGES_STEPS;H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_STEPS;H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS',0)} See related topics

Details: Creating a Notepad page

Creating Notepad pages in other ways
You can also choose Create - Page or press INS to create a Notepad page when you are in the Notepad section.

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS',1)} Go to procedure

Creating a Notepad page

In Notepad, you can create pages and assign styles and colors to them. You can add text and objects to your Notepad pages.

Creating the page

1. Go to the Notepad section and double-click the Notepad page.

2. For Title, enter a title that describes what this Notepad page will contain.
3. Under Page number, select the appropriate option.
4. Under Style, select the appropriate styles.
5. Select the options to create a category and make a page confidential.
6. Click OK.

Tip To create additional Notepad pages, click Add before you click OK. When you finish entering your Notepad pages, click OK.

Adding text to the page

After you've entered a title for the Notepad page, and selected any of the styles and options above, you can add text to your page. Position your mouse pointer on the Notepad page and click. The I-beam pointer appears. Begin typing the text you want on the page. When you're finished entering text, press F2 to save it.

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_DETAILS',1)} See details

{button ,AL(`H_ENTERING_TEXT_DIRECTLY_ON_A_NOTEPAD_PAGE_STEPS;H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_STEPS;H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_CREATING_CHAPTERS_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS;H_LINKING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Linking Notepad pages

Using linked pages

It is helpful to link pages that contain related information. A Notepad Links page lists all the links made between Organizer entries and the Notepad Links page.

For example, let's say your upcoming marketing event will include keynote speakers. You can include the names of these speakers in your Event Materials chapter and add relevant information about them. To make contacting them easier, you can create links to their addresses in the Address section so you can quickly call them or locate their address to correspond with them.

{button ,AL(`H_LINKING_NOTEPAD_PAGES_STEPS',1)} Go to procedure

Creating links pages in Notepad

You can use a Notepad Links page to display a list of links you make to the Notepad page. For example, you can create a page with links to all the information for one project or to your most commonly used applications.

1. Create a Notepad page.
2. Under Style, select Links page.

   See details
3. Click OK.
4. Create links between Organizer entries and the Notepad Links page.

   As you add links to the Notepad Links page, Organizer enters the description of the entry you're linking to to the page.
5. (Optional) Click the entry on the page to go to that entry.

Note If you create multiple links to a Notepad page without making the page a Links page, Organizer displays only one link symbol for all the links you create to the Notepad page.

{button ,AL(`H_LINKING_NOTEPAD_PAGES_DETAILS',1)} See details

{button ,AL(`H_INSERTING_A_NOTEPAD_PAGE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS;H_ASSIGNING_COLOR_TO_NOTEPAD_PAGES_STEPS;H_CREATING_LINKS_STEPS;',0)} See related topics

Selecting page numbering options

Option	Result
Automatic	Establishes an automatic method of page numbering (default).
Manual	Establishes a manual method of page numbering.

Tip Renumber your pages manually to change the order in which they appear in your Notepad section. For example, let's say you want page 8 to become page 3. From the Edit Page dialog box under Page number, type the number 3 in the Manual text box and click OK.

Selecting paragraph settings options

Option	Results
Indentation Left	From the left, indents the selected paragraph the amount you specify.
Indentation Right	From the right, indents the selected paragraph the amount you specify.
Indentation First line	From the left, indents the first line only of the selected paragraph the amount you specify.
Alignment	Aligns the selected paragraph to the left, right, or center within the paragraph indentations you've specified.

Note The system of measurement - metric or inches - by which all indentation is set is specified in Regional Settings; it is not specified in Lotus Organizer 97.

Selecting text alignment options

Option	Results
Left (CTRL+L)	Selected text appears aligned along the left margin of the Notepad page.
Right (CTRL+R)	Selected text appears aligned along the right margin of the Notepad page.
Center (CTRL+N)	Selected text appears centered on the Notepad page.

Selecting text character options

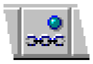
Option	Result
Normal text (CTRL+T)	Selected text appears normal on the Notepad page.
Bold (CTRL+B)	Selected text appears bold on the Notepad page.
Italic (CTRL+I)	Selected text appears italic on the Notepad page.
Underline (CTRL+U)	Selected text appears underlined on the Notepad page.
Strike Thru (CTRL+S)	Selected text appears with a strikethrough line on the Notepad page.

Using tab settings to customize your text

Option	Result
Set	Adds the specified tab stop position to the Tab stop position list for future use.
Clear	Removes the specified tab stop position from the Tab stop position list.
Clear All	Removes all tab stop positions from the Tab stop position list.

Breaking a linked object's link in Notepad

1. Select the linked object whose link you want to break.
2. Choose Edit - OLE Links.



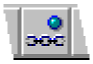
3. From the Link list, select the link you want to break.
4. Click Break Link.
5. Click Done.

Note When you break a link, the linked object still appears on your Notepad page, but the link to the original (source) application is now broken. To remove the linked object, delete it from the Notepad page after you have broken the link.

{button ,AL(`H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS',0)} See related topics

Changing how to update a linked object in Notepad

1. Select the linked object whose link update option you want to change.
2. Choose Edit - OLE Links.



3. From the Link list, select the link you want to change.
4. Select the update option you want.
5. Click Done.

{button ,AL(`H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_BREAKING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS',0)} See related topics

Creating an embedded object by using drag and drop in Notepad

Before you create an embedded object by using drag and drop, you must first name and save the original (source) application file; the original (source) application must fully support OLE.

1. Click the Notepad page on which you want to embed the object.
2. Click the page to place the cursor on the Notepad page.
3. Arrange the Organizer window and the original (source) application's window so that both are visible at the same time.
4. Select the information you want to embed.
5. Drag the selected information to the Notepad page.

   Note If you have trouble dragging and dropping, consult your original (source) application's documentation for information on how to use drag and drop in that application.
6. Release the mouse button to drop the information on the Notepad page.

   In a moment, your information appears on the page.
7. Click the Notepad page and press F2 to enter the changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_OVERVIEW_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Creating a linked object by using drag and drop in Notepad

Before you create a linked object by using drag and drop, you must first name and save the original (source) application file; the original (source) application must fully support OLE.

1. Click the Notepad page on which you want to create the linked object.
2. Click the page to place the cursor on the Notepad page.
3. Arrange the Organizer window and the original (source) application's window so that both are visible at the same time.
4. Select the information to which you want to link.
5. Press and hold CTRL+SHIFT while you drag the selected information to the Notepad page.

   Note If you have trouble dragging and dropping, consult your original (source) application's documentation for information on how to use drag and drop in that application.
6. Release the mouse button and the CTRL+SHIFT keys to drop the information on the Notepad page.

   In a moment, your information appears on the page.
7. Click the Notepad page and press F2 to enter the changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_BREAKING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS;H_CREATING_AN_EMBEDDED_OBJECT_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER',0)} See related topics

Details: Creating an OLE object in Notepad from an entire file

Entering the path and file name
You can enter the path and file name in the File text box or click Browse to locate the file you want to use as the source for the OLE object.

Selecting Link to file
Select the Link to file option to create a link to the contents of a source file rather than embedding a copy of the whole file.

Displaying the object as an icon
You can display any OLE object as an icon by selecting the Display as icon option. Displaying your object as an icon is more manageable than displaying the information associated with the linked or embedded object. When you select the Display as icon option, the OLE object appears as an icon. The default icon is the icon for the original (source) application.

Note If you decide to use an icon to represent the object, you must edit the object in a separate window; it can't be edited in place.

{button ,AL(`H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS',1)} Go to procedure

Creating an OLE object in Notepad from an entire file

1. Click the Notepad page on which you want to create an OLE object.
2. Click the page to place the cursor on the Notepad page.
3. Choose Create - Object.

4. Select the Create an object from a file option.
5. For File, enter the path and file name for the file you are using as the source for the OLE object.
   See details
6. To make a linked object, select Link to file.
   See details
   A description of the object is displayed in the Result box.
7. Select the Display as icon option to display an icon that represents the object.
   See details
8. To change the icon that represents the object, click Change Icon.
9. Select the appropriate option.
10. To change the text associated with the icon, enter the new text in the Label text box.
11. Click OK.
12. Click OK.
13. Click the Notepad page and press F2 to enter the changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Creating an OLE object in Notepad from part of a file

Selecting how to paste the object
Select the Paste option if you want to embed the object in your current file. To create a link to the object in the source file, select Paste link to source.

Displaying the OLE object as an icon
You can display any OLE object as an icon by selecting the Display as icon option. Displaying your object as an icon is more manageable than displaying the information associated with the linked or embedded object. When you select the Display as icon option, the OLE object appears as an icon. The default icon is the icon for the original (source) application.

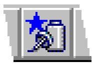
Note If you decide to use an icon to represent the object, you must edit the object in a separate window; it can't be edited in place.

{button ,AL(`H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS',1)} <u>Go to procedure</u>

Creating an OLE object in Notepad from part of a file

To create an OLE object in Notepad from part of a file, the original (source) application from which you'll copy information must support OLE. This procedure assumes you opened the original (source) application and the file from which you'll be copying information. The information must be in a saved file.

1. Select the information from the original (source) application that you want to use as the basis of your OLE object.
2. Choose Edit - Copy.
3. In Organizer, click the Notepad page on which you want the OLE object.
4. Click the page to place the cursor on the Notepad page.
5. Choose Edit - Paste Special.



6. Select the option you want.

   See details
7. Under As, select the object's type.

   A description of the object is displayed in the Result box.
8. Select the Display as icon option to display an icon that represents the object.

   See details
9. To change the icon that represents the object, click Change Icon.
10. Select the appropriate option.
11. To change the text associated with the icon, enter the new text in the Label text box.
12. Click OK.
13. Click OK.
14. Click the Notepad page and press F2 to enter your changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Creating a new OLE object in Notepad

Displaying the OLE object as an icon

You can display any OLE object as an icon by selecting the Display as icon option. Displaying your object as an icon is more manageable than displaying the information associated with the linked or embedded object. When you select the Display as icon option, the OLE object appears as an icon. The default icon is the icon for the original (source) application.

Note If you decide to use an icon to represent the object, you must edit the object in a separate window; it can't be edited in place.

{button ,AL(`H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS',1)} Go to procedure

Creating a new OLE object in Notepad

You can create a new worksheet, document, or other object from within Organizer by creating a new OLE object in Notepad. You create a new object to hold information that you're creating for the first time, not from information that already exists in a file. For example, if you're working in Organizer and need to create a new worksheet to store some numbers and calculations. You can create a worksheet object and embed it in Notepad.

1. Click the Notepad page on which you want to create an OLE object.
2. Click the page to place the cursor on the page.
3. Choose Create - Object.

4. From the Object type list box, select the type of OLE object you want to create.

   A description of the object is displayed in the Result box.
5. Select the Display as icon option to display an icon that represents the object.

   See details
6. To change the icon that represents the object, click Change Icon.
7. Select the appropriate option.
8. To change the text associated with the icon, enter the new text in the Label text box.
9. Click OK.
10. Click OK.
11. Click the Notepad page and press F2 to enter your changes to the Notepad page.

Tip To increase the area in which to display and edit your OLE object, create your OLE object on a folded Notepad page.

{button ,AL(`H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS;H_FOLDING_NOTEPAD_PAGES_STEPS',0)} See related topics

Details: Editing an embedded object in a separate window
Applications that don't support the in-place editing of embedded objects allow you to edit embedded objects in a separate window. When you double-click an embedded object to edit it in a separate window, Organizer starts the original (source) application for the embedded object.

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_AS_A_SEPARATE_FILE_IN_NOTEPAD_STEPS',1)} Go to procedure

Editing an embedded object in a separate window

If the object's source application fully supports OLE, you can edit the object "in place." Otherwise, follow the procedure given below.

1. Click the embedded object to select it in the Notepad page.
2. Double-click the object to open the object's application window.
3. Edit the embedded object.

   See details
4. In the object's application, choose File - Update (Lotus Organizer).
5. Depending on the object's application, choose File - Exit or File - Exit & Return to (Lotus Organizer).
6. Click the Notepad page and press F2 to enter your changes.

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_AS_A_SEPARATE_FILE_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_OVERVIEW_EDITING_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_EDITING_AN_EMBEDDED_OBJECT_INPLACE_IN_NOTEPAD_STEPS',0)} See related topics

Details: In-place editing an embedded object in Notepad

Understanding in-place editing

Applications that fully support OLE functionality let you edit embedded objects in-place. This means you edit the object inside the Organizer window. When you double-click an embedded object that can be edited in place, the following actions occur:

- The selected object looks as though it's still embedded in Organizer.
- The Organizer menus and tools change to match the original (source) application's menus (except for the Organizer File and Section menus).
- Part of the original (source) application's frame may appear in and around the embedded object. For example, spreadsheet rows, columns, and gridlines may appear if the embedded object is from a spreadsheet.

Check the documentation for the original (source) application to determine if it supports all OLE functionality.

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_INPLACE_IN_NOTEPAD_STEPS',1)} Go to procedure

In-place editing an embedded object in Notepad

Check the documentation for the original (source) application to make sure it supports the OLE in-place editing capability.

1. Click the embedded object to select it in the Notepad page.
2. Double-click the embedded object to edit.

   See details
3. Edit the embedded object.
4. Click the Notepad page outside the embedded object and press F2 to enter your changes.

Note You can't use in-place editing for linked objects or objects displayed as icons.

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_INPLACE_IN_NOTEPAD_DETAILS',1)} See details
{button ,AL(`H_OVERVIEW_EDITING_EMBEDDED_OLE_OBJECTS_IN_NOTEPAD_OVER;H_EDITING_AN_EMBEDDED_OBJECT_AS_A_SEPARATE_FILE_IN_NOTEPAD_STEPS',0)} See related topics

Details: Editing a linked object's link in Notepad
You can change the source for a link in the Edit Link dialog box. For example, if the directory of the original (source) file changes, or if the name of the original (source) file changes, you need to modify your links to reflect the changes.

Editing the linked object's link
You can click the Look in drop-down box to select the path where the original (source) file is located, for File name enter the name of the original (source) file, and/or click the Files of type drop-down box to select the type of file you want.

{button ,AL(`H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS',1)} <u>Go to procedure</u>

Editing a linked object's link in Notepad

1. Select the linked object whose link you want to edit.
2. Choose Edit - OLE Links.

3. In the Link box, select the link to edit.
4. Click Edit Link.
5. Edit the link.

   See details
6. Click OK.
7. Click Done.

Note If you move an original file, you must edit the link information for all links to that file.

{button ,AL(`H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_DETAILS',1)} See details

{button ,AL(`H_BREAKING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS;H_OVERVIEW_OBJECT_LINKS_IN_NOTEPAD_OVER',0)} See related topics

Overview: Editing embedded objects in Notepad

There are two ways that you can edit embedded objects in Notepad. You can edit the object "in place," or you can edit it in a separate window. The type of editing that's available depends on how the object's source application supports OLE and on the type of object you created.

Supporting OLE

All applications that support OLE let you edit embedded objects. Some applications require that you edit the object in the application's window; others let you edit the object in place. If the object's source application fully supports OLE functionality (if the Organizer menus change when you double-click the object), you can edit the object in place.

Editing in a separate window

When you create embedded objects in Notepad, you can create different types of objects, including embedded objects and embedded objects that are linked to a source file. You can choose to display the object's contents or to represent the object with an icon. The type of object affects the way you can edit. You must edit the following types of objects in a separate window:

- Objects whose source application doesn't support in-place editing
- Objects that are linked to a source file
- Objects that are displayed as an icon

When you edit one of the above types of object, a separate window for the object's application opens. You edit the object in that window, update your Organizer file from the application's window, and exit the application and return to Organizer.

Editing in place

When you edit an embedded object in place, you can still see the rest of the destination document (Notepad page) in a single window. The menus and other tools in the window all belong to the original (source) application for the embedded object you're editing except for the Organizer File and Section menus. You can edit in place the following types of objects:

- Objects whose source application supports in-place editing
- Embedded objects that aren't linked to a source file
- Objects that aren't represented by icons

{button ,AL(`H_EDITING_AN_EMBEDDED_OBJECT_AS_A_SEPARATE_FILE_IN_NOTEPAD_STEPS;H_EDITING_AN_EMBEDDED_OBJECT_INPLACE_IN_NOTEPAD_STEPS',0)} See related topics

Overview: Embedded objects in Notepad

You can embed objects in Notepad from any applications that support OLE.

Creating embedded objects in Notepad

You can create embedded objects from all or from part of an existing file, or you can create a new embedded object. You can display the contents of the embedded object you create, or you can choose to display the embedded object as an icon. When you display the embedded object as an icon, you can use the icon from the object's original (source) application or you can choose a different icon.

- **Creating embedded objects with commands**

  You embed objects using Edit - Paste Special or Create - Object. These commands are similar, but you use Edit - Paste Special to embed an object you have either copied or cut from the file of another application. You use Create - Object to embed an entire file or to create a new OLE object.

- **Creating embedded objects with drag and drop**

  Organizer supports the drag and drop features of OLE. If the application you're sharing information with also supports OLE drag and drop, you can create embedded objects by dragging the information from the application and dropping it in Notepad.

{button ,AL(`H_CREATING_AN_EMBEDDED_OBJECT_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS',0)} See related topics

Overview: Linked Objects in Notepad

A linked object lets you connect information from the original (source) file (for example, Lotus 1-2-3) with a destination file (for example, your Organizer Notepad). You can choose to update linked objects manually or automatically. When you create a linked object with automatic update, the destination file is automatically updated so that it reflects changes made in the original (source) file.

For example, let's say you want to use information from a Lotus 1-2-3 worksheet and see it in your Notepad section, and the Lotus 1-2-3 worksheet information changes weekly. You can embed the Lotus 1-2-3 worksheet and create a linked object so that whenever you open your Notepad section, the worksheet automatically appears with the latest updates.

Creating linked objects in Notepad

You can create linked objects from a Notepad page to other applications.

- **Creating linked objects with commands**

  You create object links using Edit - Paste Special or Create - Object. These commands are similar, but you use Edit - Paste Special to paste a link to specific information you copied in the file of another application. You use Create - Object to create a link to an entire file.

- **Creating linked objects with drag and drop**

  Organizer supports the drag and drop features of OLE. If the application you're sharing information with also supports OLE drag and drop, you can create a linked object by dragging the information (while pressing CTRL+SHIFT) from the application and dropping it in Notepad.

Managing linked object links

You can view, edit, update, and break linked object links by choosing Edit - OLE Links. For example, you can edit a link so that it refers to a different piece of information in the original (source) application, or you can change a link's update mode from automatic to manual.

{button ,AL(`H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_BREAKING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS;H_EDITING_AN_OBJECT_LINK_IN_NOTEPAD_STEPS',0)} See related topics

Overview: Sharing information using OLE in Notepad

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

Understanding when to use linked objects

A linked object lets you connect information from a source file (for example, a Lotus 1-2-3 worksheet) with a destination file (for example, your Organizer Notepad page). When you update linked objects, the latest information from the source file appears in the destination file.

Use linked objects when all of the following circumstances are true:

- You need to share information between Windows applications.
- You expect the shared information to change.
- You need to update the shared information whenever the source file's information changes.

For example, let's say you want to use information from a Lotus 1-2-3 worksheet and see it in your Notepad section, and the Lotus 1-2-3 worksheet information changes weekly. You can create a linked object so that whenever you open your Notepad section, the worksheet automatically appears with the latest updates.

You don't need to use linked objects when any one of the following circumstances is true:

- You use the information in only one application.
- You don't expect the information to change.
- You don't need to update the shared information when the original (source) information changes.

For example, let's say you created your company logo in Lotus Freelance Graphics and you want to use the logo on a Notepad page. In this example, you shouldn't use a link because it is unlikely the logo will change. Instead, you could simply copy the logo in Lotus Freelance Graphics and paste it on your Notepad page.

Understanding when to use embedded objects

An embedded object lets you create information in one application (for example, a Lotus Word Pro document) but store the information in a file in another application, called the container application (for example, Organizer).

Use embedded objects when both of the following circumstances are true:

- You use the information in the container application.
- You expect to edit or update the information.

For example, if you make a marketing presentation in a Word Pro document, you can embed the Word Pro document on a Notepad page. When you distribute it for others to review, if your reviewers want information from the Word Pro document, they can simply double-click the Word Pro icon to open the file that contains your information.

{button ,AL(`H_CREATING_AN_OBJECT_LINK_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CREATING_AN_EMBEDDED_OBJECT_USING_DRAG_AND_DROP_IN_NOTEPAD_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_AN_ENTIRE_FILE_STEPS;H_CREATING_AN_OLE_OBJECT_IN_NOTEPAD_FROM_PART_OF_A_FILE_STEPS;H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS;H_CHANGING_AN_OBJECT_LINKS_UPDATE_MODE_IN_NOTEPAD_STEPS;',0)} See related topics

Selecting icon options for OLE objects

Option	Result
Current	Uses the current icon to represent the object (default).
Default	Uses the application's default icon to represent the object.
From File	Uses the icon from the file specified to represent the object.

Selecting the type of OLE object you want

Option	Result
Paste	Pastes (default) the information from the original (source) application in the format you select, for example, Formatted Text (RTF), Unformatted Text, Enhanced metafile picture, and so on.
Paste link to source	Pastes a link to the information you selected in the original (source) application, for example, a link to a Word Pro document, a link to a 1-2-3 worksheet, and so on.

Selecting update options

Option	Result
Automatic	Updates the linked object automatically when you open the Notepad page that contains the link. Also updates the linked object whenever changes are made to the original file. Use automatic update to ensure your information is always current.
Manual	Updates the linked object only when you click Update Now in the OLE Links dialog box. Use Manual when you have many links, or the link is to a large file and automatically updating the linked object would be slow.

Canceling an alarm

You can cancel an alarm that you've set.

1. Edit the entry for which you've set the alarm.
2. Click Alarm.
3. Click Cancel Alarm.
4. Click OK.
5. Click OK.

{button ,AL(`H_RESPONDING_TO_AN_ALARM_STEPS;H_EDITING_A_REPEATING_ENTRY_DETAILS;H_DELETING_A_REPEATING_ENTRY_STEPS',0)} See related topics

Changing your repeating entries

When you change a repeating entry, the changes you make affect the repeating entry as it represents one specific group; the changes you make do not affect all repeating entries in Organizer.

Option	Result
Just this one	Changes the selected entry only; for example, your weekly Tuesday meeting is changed for one Tuesday.
All	Changes the repeating entry entirely; for example, all of your weekly Tuesday meetings are changed.
All previous	Changes the selected and all previous repeating entries for the specific group; for example, your weekly meeting is changed from the specified date and any previous dates.
All future	Changes the selected repeating entry and all future repeating entries for the specific group; for example, your weekly Tuesday meeting is changed from the specified date and any future dates.
All until	Changes the selected repeating entry and all future repeating entries for the specific group until the date you specify; for example, until two months from today, your weekly Tuesday meeting is changed.

Details: Creating an entry

Creating an entry from within a section
You can also press INS or click the Create icon to create an entry in the section you are in.

You can also choose the following commands from within the appropriate section. For example, you can choose Create - Appointment in the Calendar section; choose Create - Task in the To Do section; choose Create - Calls in the Calls section, and so on.

Command	Result
Create - Appointment	Displays the Create Appointment dialog box where you can insert a Calendar appointment.
Create - Task	Displays the Create Task dialog box where you can insert a To Do task.
Create - Address	Displays the Create Address dialog box where you can insert a business or home address.
Create - Call	Displays the Create Call dialog box where you can insert a call.
Create - Event	Displays the Create Event dialog box where you can insert a Planner event.
Create - Page	Displays the Create Page dialog box where you can insert a Notepad page.
Create - Anniversary	Displays the Create Anniversary dialog box where you can insert an anniversary.

Choosing any kind of entry from any other section
Let's say you are in the Calendar section, and you remember a task you must complete before you go to the appointment you've just scheduled. Choose Create - Entry In (Calendar, To Do, Address, Calls, Planner, Notepad, Anniversary) and select To Do. Even though you are still in the Calendar section, the Create Task dialog box appears where you can enter your task information without leaving the section you're in.

{button ,AL(`H_CREATING_AN_ENTRY_STEPS',1)} Go to procedure

Creating an entry

You can create entries in any section of Organizer without needing to go to the section where you want the entry to be created.

1. Choose Create - Entry In and choose the type of entry you want to create.

   See details

2. Select the options you want and enter information appropriate to the type of entry you are creating.
3. Click OK.

{button ,AL(`H_CREATING_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_REPEATING_ENTRY_STEPS;H_MAKING_AN_APPOINTMENT_STEPS;H_INSERTING_AN_ANNIVERSARY_STEPS;H_INSERTING_A_PLANNER_EVENT_STEPS;H_INSERTING_AN_ADDRESS_RECORD_STEPS;H_INSERTING_A_CALL_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_INSERTING_A_NOTEPAD_PAGE_STEPS',0)} See related topics

Details: Creating a repeating entry

Understanding Repeats
When you create a repeating entry you must select the type of repeating entry you want, such as Daily, Weekly, Custom, and so on; and you must also select the frequency with which you want your entries to repeat, such as Every day, each Tuesday and Thursday, and so on.

There are numerous Repeats options available to you. Click the drop-down boxes to see them.

Using Custom dates
You can make your entries repeat on dates you select through the Custom dates option. Select custom dates by clicking the Custom option from the Repeats drop-down box. Then click the Custom dates drop-down box and select the dates you want. Select one date at a time and click Add to add it to your Custom dates list. You can remove a date from your list by clicking the date and then clicking Remove.

Setting the duration for repeating entries
Under Duration, select the period of time during which your entries will repeat. Click the Until drop-down box to indicate through what date the entry will repeat; or go to the For field and select a specific number of days, weeks, months, or years for the entry to repeat.

Selecting weekend options
When you create a repeating entry, a date in the repeating series may fall on a Saturday or Sunday. You can set your repeating entry to occur on a weekend or not. Click the At weekends drop-down box to select the appropriate option.

- **Don't move**

  If a repeating entry occurs on a Saturday or Sunday and you don't want to change it, select Don't move (default).
- **Move to Friday**

  If a repeating entry occurs on a Saturday or Sunday and you want it to occur on the preceeding Friday, select Move to Friday.
- **Move to Monday**

  If a repeating entry occurs on a Saturday or Sunday and you want it to occur on the following Monday, select Move to Monday.
- **Move to nearest weekday**

  If a repeating entry occurs on a Saturday or Sunday and you want it to occur on either the preceeding Friday or the following Monday, select Move to nearest weekday.
- **Delete**

  If a repeating entry occurs on a Saturday or Sunday and you want to delete that entry rather than move it to a Friday or Monday, select Delete.

Tip To clear your selections without closing the Repeats dialog box, click Reset.

{button ,AL(`H_CREATING_A_REPEATING_ENTRY_STEPS',1)} Go to procedure

Creating a repeating entry

You can create any variation of repeating entries. For example, you could create weekly meetings in Calendar, bi-weekly tasks in To Do, daily phone calls in Calls, and so on.

1. Create or edit an entry.
2. Click Repeat.
3. Select the appropriate options.

   See details
4. Click OK.
5. Click OK.

{button ,AL(`H_CREATING_A_REPEATING_ENTRY_DETAILS',1)} See details

{button ,AL(`H_USING_TIME_TRACKER_STEPS;H_EDITING_A_REPEATING_ENTRY_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_RESPONDING_TO_AN_ALARM_STEPS',0)} See related topics

Deleting a repeating entry

1. Select the repeating entry you want to delete.
2. Drag and drop the entry to  in Toolbox.
3. Select the appropriate options.
4. Click OK.

{button ,AL(`H_CREATING_A_REPEATING_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_STEPS;H_UNDOING_YOUR_LAST_ACTION_STEPS',0)} See related topics

Deleting a repeating entry

When you delete a repeating entry, the deletion affects the repeating entry as it represents one specific group; the deletion doesn't affect all repeating entries in Organizer.

Option	Result
Just this one	Deletes the selected entry only; for example, your weekly Tuesday meeting is deleted for one Tuesday.
All	Deletes the repeating entry entirely; for example, your weekly Tuesday meeting is deleted completely.
All previous	Deletes the selected repeating entry and all previous repeating entries for the specific group; for example, your weekly Tuesday meeting is deleted from the specified date and any previous dates.
All future	Deletes the selected repeating entry and all future repeating entries for the specific group; for example, your weekly Tuesday meeting is deleted from this week and any future dates.
All until	Deletes the selected repeating entry and all future repeating entries for the specific group until the date you specify; for example, until two months from today, your weekly Tuesday meeting is deleted.

Details: Editing a repeating entry

Keyboard shortcuts
You can also press CTRL+E to edit a repeating entry you selected.

Understanding what information you can change in repeating entries
You can change information for a repeating entry, but you can't change the repeat pattern of repeating entries.

For example, if you have an appointment that repeats, you can change the appointment text, the appointment time, and any attributes you assigned to it, such as confidential, cost code, alarm, and so on.

You can also change the appointment date as long as the repeat pattern stays the same. For example, if you have a repeating weekly Monday appointment, you can change it to Tuesday because the repeat pattern is the same, that is, one appointment per week. Namely, only the day has changed.

If you need to change a weekly Monday appointment to every other Monday, you must the delete the repeating appointment and create a new repeating appointment.

{button ,AL(`H_EDITING_A_REPEATING_ENTRY_STEPS',1)} Go to procedure

Editing a repeating entry

You can edit specific information in repeating entries, but you can't edit the repeat pattern of repeating entries.

1. Double-click the repeating entry you want to edit.
2. Edit the entry.

   See details
3. Click OK.

   The Change Repeating Appointment dialog box appears.
4. Select the appropriate options.
5. Click OK.

Note If you make any change to a repeating appointment, Organizer automatically displays a dialog box asking if you want to change all the repeating appointments. The options for changing the repeating appointments are the same options as those listed in Step 4.

{button ,AL(`H_EDITING_A_REPEATING_ENTRY_DETAILS',1)} See details

{button ,AL(`H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_DETAILS;H_USING_TIME_TRACKER_STEPS',0)} See related topics

Overview: Alarms

You can set alarms in the Calendar, To Do, Calls, Planner, and Anniversary sections. Organizer can start an application automatically for you - such as a spreadsheet or a word processing application - if you set an alarm and specify what application you want to start. You can open a file, remind yourself of an appointment, or remind yourself to make an important phone call simply by setting an alarm. You can also display a message when your alarm goes off, for example, Bring financial forecasts to meeting!

{button ,AL(`H_LAUNCHING_ANOTHER_APPLICATION_FROM_ORGANIZER_STEPS;H_RESPONDING_TO_AN_ALARM_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS',0)} See related topics

Responding to alarms

Command button or option	Result
Start	Starts (default) or doesn't start an application when the alarm goes off.
Snooze for	Indicates the number of minutes the alarm is deferred.
Snooze	Defers the alarm for the number of minutes specified (this works in conjunction with Snooze for).
Turn to	Turns to the entry for which the alarm was set.

Details: Responding to an alarm

Closing the Alarm dialog box
You can click OK to close the Alarm dialog box.

Canceling starting an application
To cancel starting an application, click Start to deselect it, and click OK.

Using Snooze
You can reset the alarm to go off again at another time.

Let's say you set an alarm to start an application at a specific time, but when that alarm goes off, let's say you want more time to finish what you're working on before Organizer starts the other application. For Snooze for, press + (plus) to increase or - (minus) to decrease the time you want and click Snooze.

Using Turn to
You can click Turn to to see the entry for which you set the alarm and click OK.

{button ,AL(`H_RESPONDING_TO_AN_ALARM_STEPS',1)} Go to procedure

Responding to an alarm

You can respond to an alarm by choosing any of the Alarm options.

See details

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

{button ,AL(`H_RESPONDING_TO_AN_ALARM_DETAILS',1)} See details

{button ,AL(`H_CREATING_AN_ENTRY_STEPS;H_USING_TIME_TRACKER_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;',0)} See related topics

Selecting alarm options

Option	Result
Date	Represents the date the alarm will go off.
Time	Represents the time the alarm will go off.
00h 5 +/- (Number of minutes)	Sets the alarm to go off a specified number of minutes before or after the time that is set in the Time field. The default is 5 minutes. (This works in conjunction with Before and After.)
Before	Indicates that the alarm will go off a specified number of minutes before the time that is set in the Time field. (This works in conjunction with Number of minutes.)
After	Indicates that the alarm will go off a specified number of minutes after the time that is set in the Time field. (This works in conjunction with Number of minutes.)
Tune	Plays the selected tune when the alarm goes off.
Message	Displays a message when the alarm goes off.
Start	If an application was specified when the alarm was set, the application starts when the alarm goes off.
Display alarm	Displays (default) the Alarm dialog box when the alarm goes off.

Details: Setting alarms for an entry

Setting the alarm
In the Alarm dialog box, click the Date and Time drop-down boxes for when you want the alarm to go off. You can also set the alarm to go off minutes before or after the time you selected. To do this, select the number of minutes you want by clicking + (plus) to increase or - (minus) to decrease the time and then selecting Before or After.

For example, if you've set the alarm to go off on October 14 at 10:30 a.m. for a meeting you must attend, you can give yourself a few additional minutes to finish up what you'll be working on if you set the alarm to go off 10 minutes before the meeting time.

Selecting a tune for your alarm
You select the tune for your alarm by clicking the Tune drop-down box and selecting what you want. The default tune is the sound of an alarm clock, but you can select another tune. You can hear each tune by selecting a tune and then clicking Play.

Displaying a message with your alarm
If you want a message displayed when your alarm goes off, for Message, enter the message you want displayed. For example, Bring financial forecasts to meeting!

Starting an application with an alarm
You can start an application, open a file, and so on, in conjunction with setting an alarm. For Start, enter what you want to start. If necessary, click Browse for a listing of your files and applications.

What happens when the alarm goes off
When your alarm goes off, Organizer displays (default) the Alarm dialog box associated with the alarm you've set. The Alarm dialog box contains the information you entered when you set the alarm. If you don't want the Alarm dialog box to appear, click the Display alarm option to deselect it.

{button ,AL(`H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS',1)} Go to procedure

Setting alarms for an entry

You can set alarms in Calendar, To Do, Calls, Planner, and Anniversary.

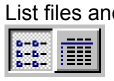
1. Create or edit an entry.
2. Click Alarm.
3. Select the appropriate options.

   See details
4. Click OK.
5. Click OK.

{button ,AL(`H_SETTING_ALARMS_FOR_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_USING_TIME_TRACKER_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_DETAILS;H_RESPONDING_TO_AN_ALARM_STEPS;H_LAUNCHING_ANOTHER_APPLICATION_FROM_ORGANIZER_STEPS',0)} See related topics

Using browse icons

Option	Results
Up one level 	Takes you up one level in the directory hierarchy.
Create new folder 	Lets you create a new folder.
List files and display details 	Lists the files in the selected folder or displays the file details, such as the file size, file type, and the last date the file was modified.

Details: Using time tracker

Changing the time in other ways

To change the start time or end time of an appointment with time tracker, press or ↓ .

To change the duration time of an appointment with time tracker, press and hold SHIFT while you press   or ↓ .

{button ,AL(`H_USING_TIME_TRACKER_STEPS',1)} Go to procedure

Using time tracker

You can use time tracker to change the start and end times of an appointment and to control an appointment's duration.

1. Create or edit an appointment in Calendar.
2. Click the Time drop-down box to display time tracker.
3. To change the start time of an appointment, drag the top clock on time tracker.
4. To change the end time of an appointment, drag the bottom clock on time tracker.
5. To move the entire appointment, drag time tracker using the duration time (the center bar) in the middle.
6. Click OK.

{button ,AL(`H_USING_TIME_TRACKER_DETAILS',1)} See details

{button ,AL(`H_CREATING_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_EDITING_A_REPEATING_ENTRY_STEPS;H_DELETING_A_REPEATING_ENTRY_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_RESPONDING_TO_AN_ALARM_STEPS',0)} See related topics

Details: Changing a password

Changing passwords

When you have Owner access, you can choose File - Save As and click Passwords to change the passwords. The password dialog box appears with the existing passwords for each type of access. Highlight the password you want to change and enter a new password. Press TAB to move between the password fields.

Changing passwords in other ways

You can also change passwords by choosing File - User Setup - Passwords and entering new passwords in the Passwords dialog box.

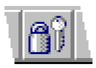
Removing passwords

You can remove passwords for a file by displaying the Passwords dialog box, highlighting the password you want to remove, and pressing BACKSPACE to delete the password. If you choose File - User Setup - Passwords to display the Passwords dialog box, you must be sure to save the file to remove the paswords.

{button ,AL(`H_CHANGING_A_PASSWORD_STEPS',1)} Go to procedure

Changing a password

1. Open the file whose password you want to change.
2. Choose File - Save As.
3. Click Passwords.



4. Enter a new password for Owner, Assistant, and Reader.

   See details
5. Click OK.
6. Confirm the password by entering it again.
7. Click OK to confirm the password.
8. Click OK.

{button ,AL(`H_CHANGING_A_PASSWORD_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_PASSWORD_STEPS;H_REMOVING_A_PASSWORD_STEPS;H_OPENING_AN_ORGANIZER_FILE_STEPS',0)} See related topics

Details: Creating a password

Creating a password in other ways
You can also enter passwords for a file by choosing File - User Setup - Passwords and entering passwords in the Passwords dialog box. You must be sure to save the file after you enter the passwords for the passwords to be added to the file.

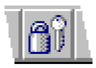
Entering passwords
When you enter a password for Owner access, you can also enter passwords for Assistant and Reader access. To enter a different password for Assistant and Reader access, enter a new password in both the Assistant password field and the Reader password field. Press TAB to go to the Assistant password field and enter a new password. Press TAB again to go to the Reader password field and type a new password.

{button ,AL(`H_CREATING_A_PASSWORD_STEPS',1)} Go to procedure

Creating a password

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

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



4. Enter a password for Owner, Assistant, and Reader.

   See details

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

{button ,AL(`H_CREATING_A_PASSWORD_DETAILS',1)} See details

{button ,AL(`H_CHANGING_A_PASSWORD_STEPS;H_REMOVING_A_PASSWORD_STEPS;H_OPENING_AN_ORGANIZER_FILE_STEPS;H_OVERVIEW_ACCESS_CONTROL_OVER',0)} See related topics

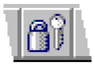
Details: Removing a password

Removing passwords in other ways
You can choose File - User Setup - Passwords to display the Passwords dialog box and remove passwords. Be sure to save the file to remove the paswords.

{button ,AL(`H_REMOVING_A_PASSWORD_STEPS',1)} Go to procedure

Removing a password

1. Open the file whose password you want to remove.
2. Choose File - Save As.
3. Click Passwords.



4. Go to the password you want to change.
5. Highlight the password you want to remove and press BACKSPACE.
   See details
6. Click OK to confirm that you want to remove the password.
7. Click OK.

{button ,AL(`H_REMOVING_A_PASSWORD_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_PASSWORD_STEPS;H_CHANGING_A_PASSWORD_STEPS;H_OPENING_AN_ORGANIZER_FILE_STEPS',0)} See related topics

Changing Connection properties for a Dialing Device

Option	Result
Data Bits	Lets you select the data bits for connections you make using the current dialing device and the COM port.
Parity	Lets you select the parity for connections you make using the dialing device and the COM port.
Stop Bits	Lets you select the stop bits for connections you make using the dialing device and the COM port.
Wait for dial tone before dialing	Waits (default) or doesn't wait for a dial tone before dialing, if your modem supports it. Deselect this option if your modem isn't recognizing the dial tone in your current location, or if you manually dial your phone.
Cancel the call if not connected within 60 secs	Cancels the call if the call isn't completed within the specified number of seconds, if your modem supports it. (The default is 60 seconds.)
Disconnect a call if idle for more than 30 mins	Hangs up the phone if there's no activity within the specified number of minutes. (The default is 30 minutes.)
Port Settings	Lets you specify port settings for ports from other manufacturers. See your port hardware documentation for more information about the available settings.
Advanced	Lets you specify types of error and flow control for the connection and other modem settings. These settings force error checking, but they may make your connection less reliable.

Details: Changing telephone dialing preferences

Selecting the dialing device

If you installed and setup more than one dialing device in the Windows 95 Control Panel, you can specify another dialing device you want Organizer to use to dial telephone numbers.

Selecting the device address

A device address indicates a particular telephone line that's available for your dialing device. A modem dialing device typically has only one telephone line available, so there will be only one entry in the list, Address 0.

Selecting the Organizer Address section

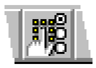
If you have more than one Address section in your Organizer file, you can specify the Address section you want Organizer to use when you select a contact name or company for a Calls entry. The default for the Search for name & companies in option is the Address section named Address. If you don't have an Address section named Address, the default is the first Address section that appears in your Organizer notebook. If you don't have an Address section in your Organizer notebook, the default is None.

{button ,AL(`H_CHANGING_DIALER_PREFERENCES_STEPS',1)} Go to procedure

Changing telephone dialing preferences

Telephone dialing preferences determine the device and settings Organizer uses to dial telephone numbers and the Address section Organizer uses to look for telephone numbers. Changing telephone dialing preferences is optional; if you don't change your telephone dialing preferences, Organizer uses the default preferences.

1. Choose File - User Setup -Telephone Dialing.



2. Under Dial using, click the Device drop-down box and select the dialing device you want.

   See details

3. If necessary, click the Address drop-down box and select the appropriate device address.

   See details

4. (Optional) Click Configure to change the properties of the device you selected in step 2.

   You can change general properties by clicking the General tab, connection properties by clicking the Connection tab, and options properties by clicking the Options tab.

5. Click OK when you finish configuring your dialing device.
6. Under Phone number lookup, click the Search for name & companies in drop-down box and select the Organizer Address section you want.

   See details

7. Click OK.

{button ,AL(`H_CHANGING_DIALER_PREFERENCES_DETAILS',1)} See details

{button ,AL(`H_DIALING_A_NUMBER_STEPS;H_DIALING_A_NUMBER_QUICKLY_STEPS;H_CHANGING_MODEM_SETTINGS_STEPS',0)} See related topics

Changing General properties of a dialing device

Option	Result
Port	Lets you select the port on your computer your dialing device is connected to, if your dialing device uses a different port.
Speaker volume	Lets you adjust the speaker volume for the dialing device, if it supports sound.
Maximum speed	Lets you select the speed the dialing device will use to connect, if your dialing device supports it.
Only connect at this speed	Lets you prevent your dialing device from connecting at lower speeds if it is unable to connect at the higher speed you selected in the Maximum speed drop-down box, if your dialing device supports it.

Changing Options for a dialing device

Option	Result
Bring up terminal window before dialing	Displays or doesn't display (default) a terminal window so that you can type commands directly to the dialing device before you dial.
Bring up terminal window after dialing	Displays or doesn't display (default) a terminal window so that you can type commands directly to the dialing device after you dial.
Operator assisted or manual dial	Disables dialing from the dialing device and lets you dial the phone number yourself.
Wait for credit card tone	Lets you specify how many seconds to wait for a credit card tone before continuing dialing. (The default is 8 seconds.)
Display modem status	Displays (default) of doesn't display a status window that shows the progress of the dialing device's connection.

Details: Dialing a number

Keyboard shortcut
You can also press CTRL+D to dial a number.

Dialing a number in other ways
You can dial the number of a Calls entry you created by clicking Dial in the Create Call or Edit Call dialog box.

Entering the contact name and company
If you entered names and addresses in the Address section, they appear in the name and company drop-down boxes.

Organizer attempts to match any part of the Address record you specify with the rest of the Address record. For example, if you click the Last name drop-down box and select a name from the list, Organizer supplies the person's company name and phone number.

Entering the contact phone number
After you select a contact name or company name, you can click the Phone at drop-down box to select any phone number associated with that name or company. If you don't use an Address record to specify information for your call, the Phone at drop-down box uses "The phone number entered below." In this case you must specify a phone number for the Phone number text box.

Note If you use a phone number from an Address record to dial a call, you must include ( ) (parentheses) around the phone number's area code in the Address record, for example, (508) 555-1234.

Specifying the dialing from location for a Calls entry
You can select the location you're dialing from if you set up more than one location.

Clicking Dialing Properties
When you click Dialing Properties, if your modem is installed and configured, you can add locations and change existing locations. Organizer displays the Windows 95 Dialing Properties dialog box, and you can make your changes. You can specify a particular telephone area code and country code to use. You can also specify numbers that let you access an outside line (such as 9), or use a calling card number. You can set dialing properties for different locations, for example, from home, work, or a hotel so that you can easily switch from one location to another.

You can also make these changes in the Windows 95 Control Panel, under Modems.

Note When you make changes to a location or choose a different location in the Dialing Properties dialog box, the changes you make affect all applications that use this information, not just Organizer.

Specifying the dial using device for a Calls entry
If you're dialing a telephone number from Organizer and you set up more than one telephone device for your system, you can choose another telephone device to dial a number. The default is whatever you specify when you choose File - User Setup - Telephone Dialing.

Configuring your dialing device
If you already configured your modem in the Windows 95 Control Panel, you can make changes to your modem setup. Click Configure; Organizer displays the Windows 95 Modem Properties dialog box, and you can make your changes. Changes you make to the configuration of a dialing device from Organizer are only in effect for the current Organizer session, and don't affect other applications. You can also make these changes in the Windows 95 Control Panel, under Modems.

Tracking Calls entries you dial
To create a Calls entry for the phone number you dial, under Log call in the Dialing dialog box, click Answered, No Answer, Left message, or Busy. Organizer displays the Create Call dialog box with information about the current Calls entry filled in.

{button ,AL(`H_DIALING_A_NUMBER_STEPS',1)} Go to procedure

Details: Dialing a number quickly

Keyboard shortcut

You can also dial a number by selecting an entry that includes the number and pressing CTRL+Q.

Dialing a number quickly in other ways

You can also dial a phone number quickly by dragging and dropping the entry that includes the number to  in Toolbox.

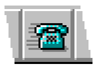
{button ,AL(`H_DIALING_A_NUMBER_QUICKLY_STEPS',1)} Go to procedure

Dialing a number quickly

Organizer can automatically dial any phone number that appears with an entry in your To Do, Address, Calls, or any other section. You must have a modem installed and connected to dial phone numbers.

Note The phone number you dial must include ( ) (parentheses) around the area code, for example, (508) 555-1234.

1. Select an entry that includes a phone number.
2. Choose Phone - Quick Dial.



The Dial dialog box appears with information from the entry you selected filled in the appropriate fields.

3. Click Dial.

   Organizer dials the phone number and then displays the Dialing dialog box.

4. Depending on the result of your call, click Hangup to end the call, click Redial to try dialing the phone number again, or click OK to leave the dialog box.

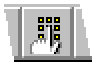
{button ,AL(`H_DIALING_A_NUMBER_QUICKLY_DETAILS',1)} See details

{button ,AL(`H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_STEPS;H_SELECTING_A_DIALING_FROM_LOCATION_AND_CONFIGURING_YOUR_MODEM_STEPS',0)} See related topics

Dialing a number

You must install and set up a modem to dial phone numbers.

1. Choose Phone - Dial.



2. Enter the contact's first name, last name, and company.

   See details
3. Click the Phone at drop-down box and select the telephone number you want to use.

   See details
4. Under Phone number, specify the appropriate options.
5. (Optional) Click the Dialing from drop-down box and make your selection.

   See details
6. (Optional) Click Dialing Properties and select the appropriate options for the location you're dialing from.

   See details
7. (Optional) Click the Dial using drop-down box and make your selection.

   See details
8. (Optional) Click Configure to change the properties of the device you selected in step 7.

   You can change general properties by clicking the General tab, connection properties by clicking the Connection tab, and options properties by clicking the Options tab.

   See details
9. Click Dial.

   Organizer dials the phone number and displays the Dialing dialog box.
10. Depending on the result of your call, click Hangup to end the call, click Redial to try dialing the phone number again, or click OK to leave the dialog box.

    See details

{button ,AL(`H_DIALING_A_NUMBER_DETAILS',1)} See details

{button ,AL(`H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_QUICKLY_STEPS;H_SELECTING_A_DIALING_FROM_LOCATION_AND_CONFIGURING_YOUR_MODEM_STEPS',0)} See related topics

Details: Selecting a dialing from location and configuring your modem

Specifying the dialing from location for a Calls entry
You can select the location you're dialing from if you set up more than one location.

Clicking Dialing Properties
When you click Dialing Properties, if your modem is installed and configured, you can add locations and change existing locations. Organizer displays the Windows 95 Dialing Properties dialog box, and you can make your changes. You can specify a particular telephone area code and country code to use. You can also specify numbers that let you access an outside line (such as 9), or use a calling card number. You can set dialing properties for different locations, for example, from home, work, or a hotel so that you can easily switch from one location to another.

You can also make these changes in the Windows 95 Control Panel, under Modems.

Note When you make changes to a location or choose a different location in the Dialing Properties dialog box, the changes you make affect all applications that use this information, not just Organizer.

Specifying the dial using device for a Calls entry
If you're dialing a telephone number from Organizer and you set up more than one telephone device for your system, you can choose another telephone device to dial a number. The default is whatever you specify when you choose File - User Setup - Telephone Dialing.

Configuring your dialing device
If you already configured your modem in the Windows 95 Control Panel, you can make changes to your modem setup. Click Configure; Organizer displays the Windows 95 Modem Properties dialog box, and you can make your changes. Changes you make to the configuration of a dialing device from Organizer are only in effect for the current Organizer session, and don't affect other applications. You can also make these changes in the Windows 95 Control Panel, under Modems.

{button ,AL(`H_SELECTING_A_DIALING_FROM_LOCATION_AND_CONFIGURING_YOUR_MODEM_STEPS',1)} Go to procedure

Selecting a dialing from location and configuring your modem

You must install and set up a modem and phone in the Windows Control Panel before you can do the steps below.

1. Choose Phone - Dial.
2. Enter the appropriate information for contact, company, and phone number.
3. Click the Dialing from drop-down box and make your selection.

   See details
4. Click Dialing Properties and select the appropriate options for the location you're dialing from.

   See details
5. Click the Dial using drop-down box and make your selection.

   See details
6. Click Configure to change the properties of the device you selected in step 5.

   You can change general properties by clicking the General tab, connection properties by clicking the Connection tab, and options properties by clicking the Options tab.

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{button ,AL(`H_SELECTING_A_DIALING_FROM_LOCATION_AND_CONFIGURING_YOUR_MODEM_DETAILS',1)} See details

{button ,AL(`;H_CHANGING_DIALER_PREFERENCES_STEPS;H_DIALING_A_NUMBER_QUICKLY_STEPS;H_DIALING_A_NUMBER_STEPS;H_INSERTING_A_CALL_STEPS',0)} See related topics

Selecting Dialing properties

Option	Results
I am dialing from	Lets you select the location you're dialing from. You can select from a list of locations that are currently set up. Click New to set up an additional location.
The area code is	Lets you specify the area code for the current location. If you're in a country other than the United States, enter your city code here, but don't include the leading 0. For example, if your city code is 071, just enter 71.
I am in	Lets you specify the country code for the current location.
To access an outside line, first dial	Lets you specify the number(s) required to access an outside line for local and long distance calls. Enter the number(s) to access an outside line for local calls in the for local text box, and the number(s) to access an outside line for long distance calls in the for long distance text box.
Dial using calling card	Displays or doesn't display (default) the calling card you want to use when you dial from this location. Click Change to select options for your calling card or to select a different calling card.
This location has call waiting	Disables (default) or doesn't disable call waiting for the current location. Call waiting should be turned off when you're dialing from your computer. Contact your telephone company for information on how to turn off call waiting.
To disable it, dial	Lets you specify the code to use to disable call waiting. Contact your telephone company for information on how to turn off call waiting.
The phone system at this location uses	Lets you specify which type of dialing to use. Specify pulse dialing only if you use a rotary type of dialing.

Changing mouse pointer preferences

You can change the way your mouse pointer appears and behaves.

1. Choose File - User Setup - Organizer Preferences.

2. Click the Environment tab.
3. Under Mouse pointer, select the appropriate option.
4. Click OK.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Changing sound preferences

Command button	Result
Play	Plays the selected sound.
Stop	Stops playback of the selected sound.
Sounds	Opens the Sounds Properties dialog box where you can change the association of sounds with events.

Changing sound preferences

You can associate sounds with events in Organizer.

1. Choose File - User Setup - Organizer Preferences.

2. Click the Environment tab.
3. Under Sound, select a sound event.
4. Click the appropriate command button.
5. Click OK.

Note To turn off Organizer sounds, select the Mute Organizer sounds option.

Changing Organizer display preferences

1. Choose File - User Setup - Organizer Preferences.

2. Click the Environment tab.
3. Under Display, select the appropriate options.
4. Click the Weeks start on drop-down box and select which day of the week your work week starts on.
5. Click OK.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_MOUSE_POINTER_PREFERENCES_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Changing the Organizer paths

Option	Contains	Default
Organizer files	Organizer files (*.ORG, *.OR2, and *.OR3)	Install directory and WORK\ORGANIZE; C:\LOTUS\WORK\ORGANIZE
Paper layouts	Organizer paper layouts and report files	Install directory and ORGANIZE\LAYOUTS; C:\LOTUS\ORGANIZE\LAYOUTS
Custom SmartIcons	Custom SmartIcons and customized (user defined) sets of SmartIcons	Install directory and ORGANIZE\ICONS; C:\LOTUS\ORGANIZE\ICONS
Backups	Organizer backup files	Install directory and BACKUP\ORGANIZE; C:\LOTUS\BACKUP\ORGANIZE

Changing the Organizer paths

Paths are used to specify the directories (folders) where you want to store similar kinds of Organizer information. For example, you can select one folder for your Organizer files, another for layouts, and another for icons.

1. Choose File - User Setup - Organizer Preferences.

2. Click the Folders tab.
3. Select the paths appropriate for you.

   If necessary, click Browse to select a different path.
4. Click OK.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_MOUSE_POINTER_PREFERENCES_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS',0)} See related topics

Changing automatic save and backup preferences

You can automatically save your files after each change or at the interval of time you specify.

1. Choose File - User Setup - Organizer Preferences.

2. Click the Save tab.
3. Select the appropriate options.
4. Click OK.

Note You can create an immediate backup at any time by clicking Make Backup Now.

{button ,AL(`H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_THE_FONT_SIZE_STEPS;H_CHANGING_MOUSE_POINTER_PREFERENCES_STEPS;H_CHANGING_SOUND_PREFERENCES_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;',0)} See related topics

Changing mouse pointer preferences

Option	Result
Plain	Displays (default) the various Organizer mouse pointers in black and white.
Color	Displays the various Organizer mouse pointers in color.
Animated	Animates the display of some Organizer mouse pointers; for example, stopwatch shows a turning second hand when animated.

Changing your display preferences

Option	Result
Clock & today's date	Displays (default) the clock and date calendar in Toolbox.
Animated page turn	Displays (default) an animated turning page when you turn the page.
Display missed alarms	Displays (default) any alarms that are passed. For example, if you set an alarm for 2:00 but closed Organizer, the alarm you missed displays when you re-open Organizer.

Changing automatic save and backup preferences

Option	Result
After each change	Automatically saves your changes after every edit or update you make (default for multiple-user access).
Every min	Lets you specify, in an interval of minutes, how often Organizer automatically saves your changes. For example, you might want to save after every 20 minutes.
Ask for confirmation first	Before your file is saved at the time interval you specified, you will be prompted to confirm each save.
Only when told	Saves your file only when you choose File - Save or File - Save As (default for single-user access); prompts you when you close a file without saving it.
Create backup when opened	Automatically creates (default) a backup file in the backup directory with the same file name and .OR3 extension, each time you open the file.

Overview: Organizer preferences

Organizer preferences are options you select that affect how Organizer opens and saves files and folders and how the Organizer environment appears and functions. You can change any of the defaults in Organizer for all of the following preferences:

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

{button ,AL(`H_CHANGING_THE_DISPLAY_OPTIONS_STEPS;H_CHANGING_THE_ORGANIZER_PATHS_STEPS;H_CHANGING_THE_SAVE_INTERVAL_STEPS;H_CHANGING_THE_STARTUP_OPTIONS_STEPS;H_CHANGING_YOUR_FONT_SIZES_DEF;H_CHANGING_YOUR_SAVE_INTERVAL_DEF;H_CHANGING_YOUR_STARTUP_OPTIONS_DEF',0)} See related topics

Overview: Changing section preferences

Section preferences are options you can select in Organizer that affect what Organizer displays in each section. Section preferences determine the following:

- The view or sort order of entries in a section.
- What information and symbols Organizer displays with each entry.
- Other options that are specific to each section, for example, start time for days in Calendar and whether to show completed tasks in To Do.

{button ,AL(`;H_CHANGING_PREFERENCES_IN_ADDRESS_STEPS;H_CHANGING_PREFERENCES_IN_ANNIVERSARY_STEPS;H_CHANGING_PREFERENCES_IN_CALENDAR_STEPS;H_CHANGING_PREFERENCES_IN_CALLS_STEPS;H_CHANGING_PREFERENCES_IN_NOTEPAD_STEPS;H_CHANGING_PREFERENCES_IN_PLANNER_STEPS;H_CHANGING_PREFERENCES_IN_TO_DO_STEPS;',0)} See related topics

Selecting an Organizer file to open automatically

Organizer can automatically open a specific file when you start Organizer.

1. Choose File - User Setup - Organizer Preferences.
2. Select the option to automatically open a file.
3. Enter the name of a file or click Browse to select a file.
4. Click OK.

Changing default file options

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

Details: Closing a file

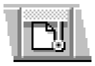
Saving an untitled current file
If you try to save the current file and you haven't named it yet, the Save As dialog box appears. You must enter a file name. Organizer lists a directory in the Save in drop-down box. If you want to select a different directory or drive, click the Save in drop-down box and select from the list that appears.

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

{button ,AL(`H_CLOSING_A_FILE_STEPS',1)} Go to procedure

Closing a file

1. Choose File - Close.



2. (Optional) If Organizer warns you that the current file contains changes you haven't saved, click the appropriate command button.

Note Be sure to make a note of the file name, extension, and directory location of the file to help you locate the file in the future.

{button ,AL(`H_CLOSING_A_FILE_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_SAVING_ORGANIZER_FILES_AUTOMATICALLY_STEPS;H_CREATING_A_BACKUP_FILE_STEPS;',0)} See related topics

Details: Creating a backup file automatically

Creating a backup when opened
By default this option is selected, and Organizer creates a backup of your file each time that you open it. The backup file has the same name and extension (.OR3) as your file, but it's saved in the backups directory.

Making a backup now
You can click Make Backup Now to create an immediate backup of your file.

Creating backup files on a network
If you are using Organizer from a network, your system administrator may have disabled the backup option. If so, you'll see an error message when you set up Organizer to create a backup file and then attempt to save a file.

{button ,AL(`H_CREATING_A_BACKUP_FILE_STEPS',1)} Go to procedure

Creating a backup file automatically

As a safeguard, you can specify that every time you open a file Organizer creates a backup file with the same file name and extension in a backup directory. If you create a backup file, you can restore the previous version of your Organizer file, if you accidentally save changes you don't want to the file.

1. Choose File - User Setup - Organizer Preferences.

2. Click the Save tab.
3. Select the Create backup when opened option.

   See details

4. (Optional) Click Make Backup Now to make an immediate backup of your file.

   See details

Note If you want to change the backup directory location, choose File - User Setup - Organizer Preferences. Click the Folders tab and enter the path for backup files in the Backups text box.

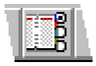
{button ,AL(`H_CREATING_A_BACKUP_FILE_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_SAVING_ORGANIZER_FILES_AUTOMATICALLY_STEPS;H_CLOSING_A_FILE_STEPS',0)} See related topics

Creating a backup file automatically

As a safeguard, you can specify that every time you open a file, Organizer creates a backup file with the same file name and extension in a backup directory. By creating a backup file, you can restore the previous version of your Organizer file, if you accidentally save changes you didn't want to the file.

1. Choose File - User Setup - Organizer Preferences.



2. Click the Save tab.
3. Select the Create backup when opened option.

   See details

4. Click OK.

Note If you want to change the backup directory location, choose File - User Setup - Organizer Setup. Click the Folders tab and edit the backup directory location in the Backups field. You can also click Browse for a listing of files and folders.

{button ,AL(`H_CREATING_A_BACKUP_FILE_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_SAVING_ORGANIZER_FILES_AUTOMATICALLY_STEPS;H_CLOSING_A_FILE_STEPS',0)} See related topics

Details: Creating a new Organizer file

Keyboard shortcut
You can also press CTRL+N to create a new Organizer file.

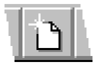
Saving an untitled active file
If you try to save the current file and you haven't named it yet, the Save As dialog box appears. You must enter a file name. Organizer lists a directory in the Save in drop-down box. If you want to select a different directory or drive, you can click the Save in drop-down box and select from the list that appears. Enter the appropriate information in the Save As dialog box and click Save to save the file.

Creating a new file based on an existing file
By default, Organizer always creates a new file when you choose File - New. In addition, you can base new Organizer files on an existing Organizer file whose sections and colors you've customize. Choose File - User Setup - Organizer Preferences and in the text box enter the name of the file to base new Organizer files on.

{button ,AL(`H_CREATING_A_NEW_ORGANIZER_FILE_STEPS',1)} Go to procedure

Creating a new Organizer file

1. Choose File - New.



2. (Optional) If Organizer warns you that another active file contains changes you didn't save, click the appropriate command button.

   See details

Note It is important that you make a note of the extension, path, and file name that you save a file to. This will help you locate the file for future use.

{button ,AL(`H_CREATING_A_NEW_ORGANIZER_FILE_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_SAVING_AN_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_SAVING_ORGANIZER_FILES_AUTOMATICALLY_STEPS;H_CREATING_A_BACKUP_FILE_STEPS;H_CLOSING_A_FILE_STEPS',0)} See related topics

Details: Opening an Organizer file

Keyboard shortcut
You can also press CTRL+O to open an Organizer file.

Selecting a file type
What you select in the Files of type drop-down box determines the type of files that Organizer displays. The default file type is Organizer Files (*.OR3). You can select Organizer 2.x (*.OR2) and Organizer 1.x (*.ORG) files or All Files (*.*) in the current path, which will show you every file in the directory, regardless of the file extension. When you try to open an Organizer 1.x or 2.x file, Organizer 97 will ask you if you want to convert the 1.x or 2.x file to an Organizer 97 file which can only be opened using Organizer 97.

Selecting a file to open
You can either enter the name of the file in the File name text box or select one from the files listed in the dialog box.

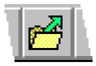
Opening a recently-used file
Organizer lists the five files you most recently used at the bottom of the File menu. To open one of these files, choose File and select a file from the bottom of the pull-down menu.

File passwords
You can assign a password to protect your file by restricting who can have access to it. There are three levels of access that you can assign passwords to: Owner, Assistant, and Reader.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS',1)} Go to procedure

Opening an Organizer file

1. Choose File - Open.



2. (Optional) Click the Files of type drop-down box to change the type of the file Organizer lists.
3. Click the Look in drop-down box to select the path and file name you want.

   See details
4. Select a file to open.

   See details
5. Click Open.
6. If the file you selected has a password assigned to it, enter the password and click OK.

   See details
7. (Optional) If you are opening a file from a previous release of Organizer, Organizer asks if you want to convert the file to an Organizer 97 file. Select the appropriate options.

   Organizer displays the file name of the open file in the title bar.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_SAVING_ORGANIZER_FILES_AUTOMATICALLY_STEPS;H_CREATING_A_BACKUP_FILE_STEPS;H_CLOSING_A_FILE_STEPS;H_CONVERTING_YOUR_ORGANIZER_RELEASE_1X_FILE_TO_ORGANIZER_2_OVER',0)} See related topics

Overview: Files

The new Organizer 97 extension is .OR3. You can open an Organizer 1.x (.ORG) file or an Organizer 2.x (.OR2) file in Organizer 97 but you can't open an .OR3 file in Organizer 1.x or Organizer 2.x. When you first start Organizer, unless you set Organizer to automatically open a specific file name, Organizer will open to an untitled window. You can create entries and do your Organizer work, but when you're finished working, you should save the file to a unique file name. If you don't save the file to a unique file name, you will lose the Organizer information you entered in the untitled window.

With Organizer files, you can do the following:

- Set a specific Organizer file to open automatically whenever you start Organizer.
- Create a backup Organizer file automatically every time you open your Organizer file.
- Combine and consolidate entries by merging one Organizer file with another Organizer file. For example, you can use your original Organizer file created on a networked PC and copy it to a notebook computer. You can continue working on the file on your notebook and then when you return to your networked PC in the office, you can merge the notebook file with your network file.
- Compact your files on a periodic basis to ensure they remain the smallest size possible in order to save hard-disk space.
- Archive information you don't need on a day-to-day basis in order to keep Organizer files manageable.

{button ,AL(`;H_ARCHIVING_INFORMATION_STEPS;H_CLOSING_A_FILE_STEPS;H_COMPACTING_A_FILE_STEPS;H_CONVERTING_AN_ORGANIZER_97_FILE_FROM_A_PREVIOUS_RELEASE_STEPS;H_CONVERTING_YOUR_ORGANIZER_RELEASE_1X_FILE_TO_ORGANIZER_2_OVER;H_OPENING_AN_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_STEPS',0)} See related topics

Details: Saving an Organizer file

Keyboard shortcut
You can also press CTRL+S to save a file.

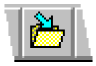
Saving an untitled current file
If you try to save a current file you haven't named yet, the Save As dialog box appears. You must enter a file name. If you want to select a different directory or drive, you can click the Save in drop-down box and make a selection from the list that appears.

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

{button ,AL(`H_SAVING_AN_ORGANIZER_FILE_STEPS',1)} Go to procedure

Saving an Organizer file

1. Choose File - Save.



   See details

2. If necessary, enter a file name.

   See details

3. (Optional) Select a file type in the Save as type list box.
4. (Optional) Click Passwords, enter a password for access to your file, and click OK.
5. Click Save.

Organizer saves the file with the.OR3 extension.

Note Be sure to make a note of the file name, extension, and directory location of the file to help you locate the file in the future.

{button ,AL(`H_SAVING_AN_ORGANIZER_FILE_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_SAVING_ORGANIZER_FILES_AUTOMATICALLY_STEPS;H_CREATING_A_BACKUP_FILE_STEPS;H_CLOSING_A_FILE_STEPS',0)} See related topics

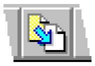
Details: Saving an Organizer file with a different name

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

{button ,AL(`H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS',1)} Go to procedure

Saving an Organizer file with a different name

1. Choose File - Save As.



2. In the File name text box, enter a different file name.

   See details

3. (Optional) To save the file to a different location, click the Save in drop-down box and select a new folder or directory.
4. (Optional) Select a file type in the Save as type list box.
5. Click Save.
6. (Optional) If you enter a file name that already exists, click No to cancel saving the file or click Yes to save your changes in the current file.

Organizer saves the file under the name you specified with the .OR3 extension.

Note Be sure to make a note of the file name, extension, and directory location of the file to help you locate the file in the future.

{button ,AL(`H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_DETAILS',1)} See details

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_SAVING_ORGANIZER_FILES_AUTOMATICALLY_STEPS;H_CREATING_A_BACKUP_FILE_STEPS;H_CLOSING_A_FILE_STEPS',0)} See related topics

Saving Organizer files automatically

You can set up Organizer to save your file automatically, either after every change or at intervals you specify. This can help prevent losing information in case of power loss or other accident.

1. Choose File - User Setup - Organizer Preferences.

2. Click the Save tab.
3. Under Save, select the appropriate options.
4. Click OK.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_CREATING_A_NEW_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_STEPS;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_CREATING_A_BACKUP_FILE_STEPS;H_CLOSING_A_FILE_STEPS',0)} See related topics

Selecting access options

Option	Result
Single-user access Lotus Organizer 97 (*.OR3)	If you use Organizer on a network where other users can access your files, lets you specify that only one user can open the file at one time. The default is Single-user access.
Multi-user access Lotus Organizer 97 (*.OR3)	If you use Organizer on a network where other users can access your files, lets you specify that more than one user can open the file at one time.

Selecting an option for saving active files

Command button	Result
Yes	Saves your changes to the file, closes the active file, and then opens the new file.
No	Closes the active file without saving your changes and opens a new file.
Cancel	Returns to the active file without opening the new file or saving changes.

Selecting an option for saving files

Option	Result
After each change	Automatically saves your changes after every edit or update you make (default for multi-user access).
Every min	Lets you specify, in an interval of minutes, how often Organizer automatically saves your changes. For example, you might want to save after every 20 minutes.
Ask for confirmation first	Before your file is saved at the time interval you specified, you will be prompted to confirm each save.
Only when told	Saves your file only when you choose File - Save or File - Save As (default for single-user access); prompts you when you close a file without saving it.

Selecting an option for saving the current file

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

Selecting an option to convert a file

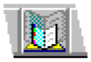
Option	Result
Yes	Converts the file to an Organizer 97 file.
No	Returns to the active file without opening the new file.

Compacting a file

You can compact your files on a periodic basis to ensure they remain the smallest size possible.

Note You cannot compact an open file.

1. Choose File - Compact.



2. Click the Look in drop-down box and select the path Organizer must use to select the file you want to compact.
3. Click the Files of type drop-down box and select the type of file you want to compact.
4. For File name, enter the name of the file you want to compact.
5. Click Compact.

   Organizer tells you that Organizer will create a backup file before compacting your file.
6. Click Yes to make a backup file.
7. Click OK when Organizer successfully compacts your file.

   The Lotus Organizer 97 File Compact dialog box reappears.
8. (Optional) To compact additional files, follow steps 2 - 7.
9. Click Exit when you're finished compacting files.

   You won't leave Organizer, you'll close only the Lotus Organizer 97 File Compact dialog box.

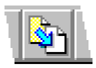
{button ,AL(`H_ARCHIVING_INFORMATION_STEPS;H_MERGING_FILES_STEPS;H_CONVERTING_AN_ORGANIZER_97_FILE_FROM_A_PREVIOUS_RELEASE_STEPS',0)} See related topics

Controlling how many users can access your files at one time

If you use Organizer on a network, you can control how many users can access your file at the same time.

When you save a file, you can specify if you want only one user to access your file at a time (called single-user access) or if you want to let more than one person access your file (called multiple-user access) at the same time. Single-user access is the default.

1. Choose File - Save As.



2. If necessary, enter the appropriate information to save the file, including the file name and path.
3. Click the Save as type drop-down box and select whether one user or more may access your file at the same time.
4. Click Save.

{button ,AL(`H_OVERVIEW_ACCESS_CONTROL_OVER;H_SAVING_AN_ORGANIZER_FILE_WITH_A_DIFFERENT_NAME_STEPS;H_SELECTING_THE_TYPE_OF_ACCESS_STEPS;H_SHARING_SECTIONS_STEPS',0)} See related topics

Overview: Sharing your files

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

Selecting the type of access to give someone

You can set three different types of access: Owner, Assistant, and Reader. Each access type requires a password. You must give the password you assigned to a particular access to those you want to be able to access your file with the particular access right. Choose File - Save As and click Passwords to select the access type and to assign a password to that right for your file. The following access types are defined.

Owner

Owner access gives a user full access to your file. Anyone with Owner access can make changes to any entry in your file and make changes to any preferences you selected for the file. Owner access lets users access entries that are confidential and change the passwords for all types of access to the file.

Note If you don't enter an Owner password, the file isn't protected by a password and anyone who either gets a copy of your file or accesses it from a network can view your file and make changes to it. If you give someone else Owner access along with you (by assigning Owner access and giving that user the Owner password), that user can view all the contents of your file, make changes to your file, as well as change all passwords. It's not recommended that you give anyone else Owner access to your file.

Assistant

Assistant access lets users make changes to entries that aren't marked confidential. Users with Assistant access can schedule appointments and change preferences, but they can't view or change entries that are confidential.

Reader

Reader access lets users read entries in your file that aren't confidential. Reader access doesn't allow users to make any changes to your file.

Controlling how many users can access your file at one time.

If you share your files on a network server, you can control how many users can access your file at one time. When you save the file for the first time or if you choose File - Save As, click the Save as type drop-down box, and select single-user or multiple-user access.

If you save a file with single-user access, only one person can open and change the file at a time. If you save a file with multiple-user access, more than one user can open and change the file at one time. If two users work on the file at the same time, Organizer saves any changes made after each change is made to the file.

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

{button ,AL(`H_OVERVIEW_ASSISTANTS_OVER;H_SELECTING_THE_TYPE_OF_ACCESS_STEPS;H_CREATING_A_PASSWORD_STEPS;;H_CONTROLLING_HOW_MANY_USERS_CAN_ACCESS_YOUR_FILES_AT_ONE_TIME_STEPS;H_SHARING_SECTIONS_STEPS;H_TROUBLESHOOTING_FILES_OVER',0)} <u>See related topics</u>

Overview: Sharing and merging files

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

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

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

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

{button ,AL(`H_TROUBLESHOOTING_FILES_OVER;H_SELECTING_THE_TYPE_OF_ACCESS_STEPS;H_CONTROLLING_HOW_MANY_USERS_CAN_ACCESS_YOUR_FILES_AT_ONE_TIME_STEPS;H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_STEPS;H_OVERVIEW_ACCESS_CONTROL_OVER;H_SCHEDULING_A_MEETING_AS_AN_ASSISTANT_STEPS;H_SELECTING_PASSWORD_AND_ACCESS_OPTIONS_DEF;H_SPECIFYING_WHO_CAN_ACCESS_YOUR_FILES_STEPS;',0)} See related topics

Selecting the type of access

Option	Result
Owner	Lets you see and change all entries (including entries marked confidential) and preferences in a file. Users with Owner access can also set the type of access and passwords for other users.
Assistant	Lets you see and change entries (except entries marked confidential) and preferences in a file. Users with Assistant access can schedule appointments and change preferences but can't view or change entries that are confidential.
Reader	Lets you see (but not change) entries in a file that aren't confidential.

Note If you're entering passwords for the first time, you must enter them in order; that is, Owner before Assistant, and Assistant before Reader.

Details: Selecting the type of access to give someone

Setting passwords

You can set three types of passwords to control the type of access to your file: Owner, Assistant, or Reader. Owner access lets you make changes to any entry (including confidential entries), lets you change any preferences selected for the file, and lets you set the type of access and passwords for other users. Assistant access lets you make changes to any entry (except confidential entries) in a file, for example, lets you schedule appointments and change preferences. Assistant access won't let you view or change entries that are confidential. Reader access lets you read any entries in a file that aren't confidential.

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

Changing a password

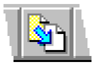
If you have Owner access, you can change the access types and passwords. With Assistant or Reader access, you can't change access types or passwords for the file.

{button ,AL(`H_SELECTING_THE_TYPE_OF_ACCESS_STEPS',1)} Go to procedure

Selecting the type of access to give someone

You can set an access for three types of access: Owner, Assistant, and Reader.

1. Choose File - Save As.



2. Click Passwords.

   See details

3. Enter a password for each type of access you want to allow.
4. Click OK.

{button ,AL(`H_SELECTING_THE_TYPE_OF_ACCESS_DETAILS',1)} See details

{button ,AL(`H_CONTROLLING_HOW_MANY_USERS_CAN_ACCESS_YOUR_FILES_STEPS;H_SHARING_SECTIONS_STEPS;H_CREATING_A_PASSWORD_STEPS;H_OVERVIEW_ACCESS_CONTROL_OVER',0)} See related topics

Details: Allowing your sections to be included in other Organizer files

Allowing changes to a section
If you want to share a section with another user and you want that user to be able to make changes to your section, you must save the file with the type of access that lets others make changes to the file. To save the file with Assistant access, set an Assistant password and save the file with multiple-user access so you can both access the file at the same time.

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

{button ,AL(`H_SHARING_SECTIONS_STEPS',1)} Go to procedure

Allowing your sections to be included in other Organizer files

You can make sections from your Organizer file available so that other users can include them in their Organizer files. To do so, you must save your Organizer files in the same location on a network server and save them with multiple-user access.

1. Choose File - Save As.

2. If necessary, enter the appropriate information to save the file, including the file name and path.
3. Click the Save as type drop-down box and select multiple-user access.
4. Click Passwords and assign the level of access for the file.
5. Click Save.

Caution If you make your file multiple-user access and don't assign passwords, any user can include sections from your file and make changes to them.

{button ,AL(`H_SHARING_SECTIONS_DETAILS',1)} See details

{button ,AL(`;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_STEPS;H_OVERVIEW_ACCESS_CONTROL_OVER;H_OVERVIEW_ASSISTANTS_OVER;H_CONTROLLING_HOW_MANY_USERS_CAN_ACCESS_YOUR_FILES_STEP;H_CHANGING_THE_NAME_OF_A_SECTION_STEPS;H_OPENING_THE_FILE_OF_SOMEONE_ELSE_ON_THE_NETWORK_STEPS;H_SPECIFYING_WHO_CAN_ACCESS_YOUR_FILES_STEPS;',0)} See related topics

Converting an Organizer file from a previous release

1. Start Organizer 97.
2. Choose File - Open.

   Note By default, Organizer 97 displays Organizer 97 (.OR3) in the Files of type drop down box. Click the Files of type drop-down box and select Organizer 1.x (.ORG) or Organizer 2.x (.OR2), depending on which release of Organizer you're upgrading from, to display your file in the list box. Select the path and file name, if necessary.
3. Select your file.
4. Click OK to open the file.
5. Click Yes to confirm that you want to convert the file.
6. Click OK when you see the message saying that the Upgrade is complete.
7. Click Yes if you want to open this file automatically every time you start Organizer. Click No if you don't want to open this file automatically.

   Your Organizer 1.x or Organizer 2.x file is now an Organizer 97 file with the same name, but with the new extension .OR3.

{button ,AL(`;H_CONVERTING_YOUR_ORGANIZER_RELEASE_1X_FILE_TO_ORGANIZER_2_OVER;H_OPENING_AN_ORGANIZER_FILE_STEPS',0)} See related topics

Overview: Converting files

To convert your current Organizer 1.x or 2.x file to use in Organizer 97, open the Organizer 1.x or 2.x file and follow the screen prompts.

Note After you convert your 1.x or 2.x file to Organizer 97, the new Organizer 97 file will be larger than your original file. This is due to the many new features in Organizer 97. You can archive your file to delete information that's no longer needed on a daily basis. You can also compact your Organizer 97 file to reduce its size. For more information, see Archiving information and Compacting a file.

When you convert a file, Organizer changes the file extension from the 1.x extension (.ORG) or 2.x extension (.OR2) to the Organizer 97 extension (.OR3). You can't use an .OR3 file with Organizer 1.x or Organizer 2.x. Your Organizer 1.x or Organizer 2.x file still exists in its original format and location.

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

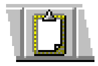
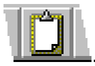
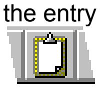
- Address section information is converted into the Street, City, State, and Country fields in Organizer 97 if the Organizer Release 1.x information was entered in a standard format for US business addresses (for example, 55 Cambridge Parkway, Cambridge, MA 02142).
- All addresses without company names are converted to the home template (H tab) in Organizer 97. Addresses with company names are converted to the business template (B tab).
- Address section information in the Organizer 1.x Type field is converted into the Categories field.
- Calls information from Organizer 1.x is converted and inserted into the Calls section.
- Organizer preferences (for example, Show Through settings) aren't converted, with the exception of the Planner key in the Planner section (for Organizer 1.x files only).
- Repeating entries are converted as single, rather than repeating, entries (for Organizer 1.x files only).
- Anniversary entries are set to repeat annually on the same date.
- Included sections from Organizer 1.x files aren't automatically included in the new Organizer 97 file. Only Organizer 97 sections can be included in an Organizer 97 file.

{button ,AL(`H_OPENING_AN_ORGANIZER_FILE_STEPS;H_ARCHIVING_INFORMATION_STEPS',0)} See related topics

Details: Copying a single entry

Keyboard shortcuts
You can also press CTRL+C to copy and CTRL+V to paste an entry where you want it copied.

Copying a single entry in other ways
To copy an entry, press and hold CTRL as you drag and drop the entry to its new location.

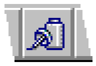
You can also copy an entry using  in Toolbox. To do so, drag and drop the entry to . Your newly copied entry writes over anything that is currently on Clipboard. Go to where you want to copy the entry and drag and drop your entry  to copy it there.

{button ,AL(`H_COPYING_A_SINGLE_ENTRY_STEPS',1)} Go to procedure

Copying a single entry

1. Select the information you want to copy.
2. Choose Edit - Copy.

3. Click where you want the information copied to: another date and time, another page, another section, and so on.
4. Choose Edit - Paste.



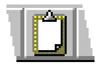
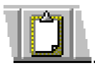
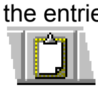
{button ,AL(`H_COPYING_A_SINGLE_ENTRY_DETAILS',1)} See details

{button ,AL(`H_COPYING_MULTIPLE_ENTRIES_STEPS;H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_SELECTING_A_SINGLE_ENTRY_STEPS;H_SELECTING_MULTIPLE_ENTRIES_STEPS;H_MOVING_A_SINGLE_ENTRY_STEPS;H_MOVING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Details: Copying multiple entries

Keyboard shortcuts
You can also press CTRL+C to copy and CTRL+V to paste selected entries where you want them copied.

Copying multiple entries in other ways
To copy selected entries to another place, press and hold CTRL as you drag and drop the multiple entries to their new location.

You can also copy multiple entries using  in Toolbox. To do so, drag and drop the entries to . Your newly copied entries write over anything that is currently on Clipboard. Go to where you want to copy the entries and drag and drop  to copy them there.

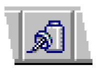
{button ,AL(`H_COPYING_MULTIPLE_ENTRIES_STEPS',1)} Go to procedure

Copying multiple entries

You can copy multiple entries that are and aren't in sequence.

1. Go to the first of the multiple entries you want to copy.
2. Select the entry.
   - If the multiple entries you're selecting are in sequence: press and hold SHIFT, move to the last entry, and click the entry.
   - If the multiple entries you're selecting aren't in sequence: press and hold CTRL, move to each entry, and click the entry.
3. Choose Edit - Copy.

4. Click where you want the information copied to: another area, another page, another section, and so on.
5. Choose Edit - Paste.



{button ,AL(`H_COPYING_MULTIPLE_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_SELECTING_A_SINGLE_ENTRY_STEPS;H_SELECTING_MULTIPLE_ENTRIES_STEPS;H_MOVING_A_SINGLE_ENTRY_STEPS;H_MOVING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Details: Moving a single entry

Keyboard shortcuts
You can also press CTRL+X to cut and CTRL+V to paste an entry where you want it moved.

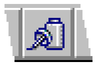
Moving a single entry in other ways
To move an entry, drag and drop the entry to its new location.

{button ,AL(`H_MOVING_A_SINGLE_ENTRY_STEPS',1)} Go to procedure

Moving a single entry

1. Select the information you want to move.
2. Choose Edit - Cut.

3. Click where you want the information moved to: another date and time, another page, another section, and so on.
4. Choose Edit - Paste.



{button ,AL(`H_MOVING_A_SINGLE_ENTRY_DETAILS',1)} See details

{button ,AL(`;H_MOVING_MULTIPLE_ENTRIES_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_SELECTING_A_SINGLE_ENTRY_STEPS;H_SELECTING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Details: Moving multiple entries

Keyboard shortcuts
You can also press CTRL+X to cut and CTRL+V to paste selected entries where you want them moved.

Copying multiple entries in other ways
To move selected entries to another place, drag and drop the multiple entries to their new location.

{button ,AL(`H_MOVING_MULTIPLE_ENTRIES_STEPS',1)} Go to procedure

Moving multiple entries

You can move multiple entries that are and aren't in sequence.

1. Go to the first of the multiple entries you want to move.
2. Select the entry.
   - If the multiple entries you're selecting are in sequence: press and hold SHIFT, move to the last entry, and click the entry.
   - If the multiple entries you're selecting are not in sequence: press and hold CTRL, move to each entry, and click the entry.
3. Choose Edit - Cut.

4. Click where you want the information move to: another area, another page, another section, and so on.
5. Choose Edit - Paste.

{button ,AL(`H_MOVING_MULTIPLE_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_MOVING_A_SINGLE_ENTRY_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_SELECTING_A_SINGLE_ENTRY_STEPS;H_SELECTING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Details: Copying Organizer field information to use in other applications

Selecting Organizer field information to copy

To select information to copy, go to the information and click.

For example, to copy information from an Address record, click the Address record to select it. To copy an appointment, a task, an event, a page, a call, or an anniversary, click the entry you want to copy. To copy information from a Notepad page, click the Notepad page you want to copy.

Using the Fields drop-down box

The fields listed in the Fields drop-down box reflect the type of Organizer information you selected.

For example, if you selected an Address record, you'll get a listing of Address record fields whose specific information you can copy; if you selected a To Do task, you'll get a listing of To Do fields, and so on.

Switching between Organizer and other Windows applications

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

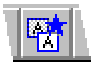
{button ,AL(`H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS', 1)} Go to procedure

Copying Organizer field information to use in other applications

You can use Copy - Special to copy specific Organizer field information from any section of Organizer. You can then paste that field information in other applications.

1. Go to the Organizer section whose field information you want to copy.
2. Select the information you want to copy.

   See details
3. Choose Edit - Copy Special.



4. Click the Fields drop-down box and select the field information you want to copy.

   See details
5. Click OK.
6. Switch to the application where you want to paste the copied field information.

   See details
7. Choose Edit - Paste.

{button ,AL(`H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_DETAILS',1)} See details

{button ,AL(`H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;H_COPYING_TEXT_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS',0)} See related topics

Details: Copying text

Keyboard shortcuts
You can also press CTRL+C to copy and CTRL+V to paste text where you want it copied.

Selecting text in an entry
To select text in an entry, press and hold the left mouse button while you drag across the text to highlight it.

{button ,AL(`H_COPYING_TEXT_STEPS',1)} Go to procedure

Copying text

You can copy text in any Organizer entry. For example, you can copy some of the text on a Notepad page rather than the entire page. You copy and paste in conjunction. When you copy information, you must paste it to see it.

1. Select the entry containing the text you want to copy.

   When you move the pointer over the selected entry, it changes to the , I-beam.
2. Click where you want to begin copying the text.

   The pointer changes to a , vertical cursor.
3. Select the text you want to copy.

   See details
4. Choose Edit - Copy.

5. Go to the page where you want your copied text to appear.
6. Click the page to select it.

   The pointer changes to the , I-beam.
7. Click where you want to begin pasting the text.

   The pointer changes to a , vertical cursor.
8. Choose Edit - Paste.

{button ,AL(`H_COPYING_TEXT_DETAILS',1)} See details

{button ,AL(`H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS',0)} See related topics

Deleting the contents of Clipboard

You can delete Clipboard contents at any time. Deleting Clipboard contents means that any information you copied to Clipboard will be cleared from Clipboard. To delete the contents of Clipboard, drag and drop  to  in Toolbox.

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

{button ,AL(`H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;',0)} See related topics

Overview: Clipboard

You can use Clipboard to quickly copy Organizer information containing text, links, a metafile, or a bitmap. Additionally, you can copy text or other information to Organizer from other Windows applications. For example, you can include a spreadsheet graph on a Notepad page or information from your word processing application.

You can also use the Copy - Special command to copy specific field information from within any section of Organizer, and then paste that field information in other applications.

Note You copy and paste in conjunction. When you copy information, you must paste it to see it.

{button ,AL(`H_PASTING_TEXT_FROM_OTHER_APPLICATIONS_IN_ORGANIZER_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS;H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS',0)} See related topics

Paste Special options

Option	Result
Paste	Pastes (default) the information from the original (source) application in the format you select, for example, Formatted Text (RTF), Unformatted Text, Enhanced metafile picture, and so.
Paste link to source	Pastes a link to the information you selected in the original (source) application, for example, a link to a Word Pro document object, a link to a 1-2-3 worksheet object, and so on.

Pasting text from other applications in Organizer

You can copy text or other information to Organizer from other Windows applications. For example, you can include a spreadsheet graph on a Notepad page or information from your word processing application.

1. From another Windows application, select and copy to Clipboard the information you want to appear in Notepad.
2. Go to the Notepad section.
3. Click the Notepad page once to select it.
4. Click the Notepad page again to place the cursor in the page.
5. Choose Edit - Paste Special.

Source: identifies where the information on Clipboard comes from.

6. Select an option.
7. Under As, select the appropriate format for the type of information you copied from your Windows application to Clipboard.

   For example, if you are displaying a graph whose size is fixed, select Bitmap. If you are displaying text select Formatted Text (RTF) or Unformatted Text, and so on.
8. Click OK.

{button ,AL(`H_COPYING_TEXT_STEPS;H_COPYING_ORGANIZER_FIELD_INFORMATION_FOR_USE_IN_OTHER_APPLICATIONS_STEPS;H_DELETING_THE_CONTENTS_OF_CLIPBOARD_STEPS;H_INSERTING_A_NOTEPAD_PAGE_STEPS',0)} See related topics

Details: Customizing layout styles

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Customizing layout styles in other ways
You can choose File - Print, select the section and layout, click Layouts, click Styles, and then select the elements you want to customize.

Customizing layout elements
Just as the list of available layouts is specific to the section you selected, the list of layout elements is specific to the layout you selected. For example, if you select Calendar as the section and Calendar List as the layout, Calendar room meeting text is available; if you select Address as the section and Address Card as the layout, Card separators is available.

Adding codes to text elements
For text elements, you can select a code that formats and adds information in text elements. For example, there are codes that format dates and times; align text; add page numbers; and add the file name, section name, and/or the report heading.

To include a code in a text element, move the mouse pointer to where you want the code in the Text text box and click. This positions the insertion pointer, . Then, click the Codes drop-down box and select a code. Organizer adds the code at the location of the insertion pointer. If you know the command for a code, you can also type the command in the Text text box where you want it.

The following table lists the code names and commands (in parentheses), and the action each code performs.

Code	Action
Day as 1,2,3 (&d)	Displays the current day as a single digit, where appropriate.
Day as 01,02,03 (&dd)	Displays the current day as two digits.
Month as 1,2,3 (&M)	Displays the current month as a single digit, where appropriate.
Month as 01,02,03 (&MM)	Displays the current month as two digits.
Month as Jan, Feb (&MMM)	Displays the current month as a three-letter abbreviation.
Month as January, February (&MMMM)	Displays the full name of the current month.
Year as 96, 97 (&yy)	Displays the current year as a two-digit number.
Year as 1996,1997 (&yyyy)	Displays all digits of the current year.
First shown data (&e)	Displays the first item printed (depending on the layout, either a heading or data).
Last shown data (&q)	Displays the last item printed (depending on the layout, either a heading or data).
Hour as 1,2,3 (&h)	Displays the current hour as a single digit, where appropriate.
Hour as 01,02,03 (&hh)	Displays the current hour as two digits.
Minutes as 1,2,3 (&m)	Displays the current minute as a single digit, where appropriate.
Minutes as 01,02,03 (&mm)	Displays the current minute as two digits.
AM or PM suffix (&a)	Displays an AM or PM suffix based on the current time.
Align left (&l)	Left aligns all text that follows.
Align center (&c)	Centers all text that follows.
Align right (&r)	Right aligns all text that follows.
Page number (&p)	Displays page numbers.
File name (&f)	Displays the name of the current file.
Registered user name (&t)	Displays the name entered at installation of the current copy of Organizer.
Organizer release number (&v)	Displays the Organizer release number.

Section name (&s)	Displays the section name.
Layout name (&k)	Displays the name of the layout you're using.
Paper name (&z)	Displays the name of the paper type you're using.
Report heading (&H)	Displays the report heading of the current layout (for example, Quarterly Planner).
Page date range long (&D)	Displays the date range for the current printing in words (for example, February 9 - 13, 1997), or when you're using one of the Daily layouts, the day name and date (for example, Monday, February 10, 1997).
Page date range short (&J)	Displays the full date range in numeric format for the current printing (for example, 2/3/97 - 2/7/97).
Page date range short (&X)	Displays the date range for the current printing in numeric format (for example, 2/9 — 2/13).
Time (&T)	Displays the time for the current printing in numeric format (for example, 12:33 PM).
Today's date (&E)	Displays the date for the current printing in numeric format (for example,10/8/96).

If OK is dimmed

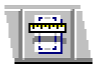
If, after you've made your selections in the Layout dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_CUSTOMIZING_LAYOUT_STYLES_STEPS',1)} Go to procedure

Customizing layout styles

You can determine what elements you use and how they appear in a layout, such as the header, footer, title, grid lines, borders, and so on. Organizer uses default settings for these elements, but you can change them. For example, you can change the font and color of a title, add a patterned background to column titles, or include a code that prints the current date in the footer.

1. Choose Edit - Layouts.



2. Click the Section drop-down box and select the section for which you want to customize the layout.
3. Click the Layout drop-down box and select the layout you want to customize.
4. Click Styles.
5. Click the Element drop-down box and select the layout element you want to customize.

   See details
6. If necessary, under Text, enter changes to a text element.

   Text elements include titles, headers, and footers.
7. If necessary, click the Codes drop-down box and select a code for the text element.

   See details
8. Click the Background drop-down box and select a background color for the element you selected.
9. Click the Pattern drop-down box and select a hatch pattern for the element you selected.
10. Repeat steps 5 through 9 for any other elements of the layout you want to customize.
11. Click OK.
12. Click OK.

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

{button ,AL(`H_CUSTOMIZING_LAYOUT_STYLES_DETAILS',1)} See details

{button ,AL(`H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS;H_SELECTING_FONTS_STEPS',0)} See related topics

Details: Customizing paper sizes, margins, and columns and rows sizes

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Customizing the paper type in other ways
You can choose File - Print, select the paper type you want to customize, click Layouts, and then click Paper to change the paper type settings.

Setting the scale elements
Organizer scales all fonts and bitmaps on the printed page by the percentage you enter. For example, if you enter 80% for the scaling, all 10-point fonts appear in 8 point.

You can use scaling to help fit information on a single sheet of paper without changing the layout.

Specifying the layout for columns and rows
You can specify the number of rows and columns for a paper type. Organizer automatically adjusts the column width and row height based on the number of rows and columns you enter and the margin settings. You can, however, customize the width and height. For example, entering a smaller measurement for the column width decreases the column size and increases the amount of space between columns.

You can also change the column width and row height by directly manipulating the illustration of the paper type (on the left side of the dialog box). Drag an edge of the gray print area and the column or row line left, right, up, or down to change the width and height. The pointer changes to as you drag the columns and rows, and the values in the Width and Height fields change. If the paper type you're changing has many rows and columns, and you want a closer view of a row or column, click the row or column and Organizer will zoom in on the area you clicked. Click the area again to go back to the original size.

Setting margins
The margins determine the print area. The print area is where Organizer prints information, and the margins are the amount of space around the outside of the print area.

You can enter specific values for the margins, or you can directly manipulate the graphical representation of the paper type. Drag the margin guides, which appear as red lines, to change the margins. The pointer changes to as you drag the margins, and the values in the margin fields change. The print area appears in gray.

Setting internal margins
Internal margins create additional space between the paper's margins and the actual print area. You might want to set internal margins to avoid printing over prepunched holes or preprinted information. The values for internal margins are typically small values; for example, an internal margin of 0.15 inches would create a small gap between the edge of a label and its printed text.

You can also set internal margins by directly manipulating the graphical representation of the paper type. Click and drag an edge of the gray print area to change the internal margins. The pointer becomes a white two-headed arrow as you drag, and the values in the internal margins fields change.

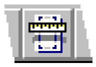
{button ,AL(`H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS',1)} Go to procedure

Customizing paper sizes, margins, and columns and rows sizes

Organizer comes with a number of predefined paper types that in most cases you won't need to customize. You can customize aspects of a paper type; for example, the margin size or paper size. Changing paper type settings is optional; if you don't change the settings, Organizer uses the default settings.

Caution If you make changes to a default paper type and save it without giving it another name different from the name it was called, you will lose the original default settings for that paper type.

1. Choose Edit - Layouts.



2. Click the Paper drop-down box and select the paper type you want to customize.
3. Click Paper.
4. (Optional) Under Name, enter a new name for the paper type.
5. For the Scale elements by option, enter the scaling percentage: 50 - 200.

   Click + (plus) to increase or - (minus) to decrease the scaling percentage. You can also highlight the number in the text box and type another number.

   See details
6. Under Page, specify any changes to the page dimensions, and select Centimeters or Inches to specify the unit of measurement for those dimensions.
7. Under Layout, specify the options for the number and size of columns and rows, as well as the column height and row width.

   See details
8. Under Margins, specify the appropriate margins.

   See details
9. Under Internal margins, specify any internal margins you want to create between the paper's margins and the actual print area.

   See details
10. Click Add to add or Remove to delete the new paper definition to the list of available paper types.

    Note The Add button is dimmed if you didn't enter a new name in step 4.

    See details
11. Click OK.
12. Click OK.

Organizer saves the paper type as a new .PLT file in your \ORGANIZE\LAYOUTS directory.

{button ,AL(`H_CUSTOMIZING_THE_PAPER_SETTINGS_DETAILS',1)} See details

{button ,AL(`H_SELECTING_LAYOUT_OPTIONS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS;H_SELECTING_FONTS_STEPS',0)} See related topics

Details: Customizing the size of a printed image

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Customizing the size of the printed image in other ways
You can choose File - Print, select the paper type to customize, then click Layouts, and then click Paper to customize the size of the printed image.

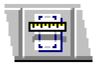
Setting the scale elements
Organizer scales all fonts and bitmaps in the printout by the amount you enter. For example, if you enter 80% for the scaling factor all 10-point fonts print in 8 point. You can use a scaling factor to help fit information on a single sheet of paper without changing the layout options.

{button ,AL(`H_CUSTOMIZING_THE_SIZE_OF_YOUR_PRINTED_IMAGE_STEPS',1)} Go to procedure

Customizing the size of a printed image

You can customize the size of a printed Organizer image by changing the scaling percentage of the print image. You can increase the size to create a larger print image or decrease the size for a smaller print image. To do this you change the scaling percentage for the paper type you're using.

1. Choose Edit - Layouts.



2. Click the Paper drop-down box and select the paper type you want to customize.
3. Click Paper.
4. For the Scale elements by option, enter the scaling percentage you want: 50 - 200.

   Click + (plus) to increase or - (minus) to decrease the scaling percentage. You can also highlight the number in the text box and type another number.

   See details
5. Click OK.
6. Click OK.

{button ,AL(`H_CUSTOMIZING_THE_SIZE_OF_YOUR_PRINTED_IMAGE_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ADDRESS_RECORDS_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SELECTING_DIFFERENT_LAYOUTS_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Overview: Customizing print layouts, paper types, and layout elements

You can customize what you want to see printed (by selecting a print layout) and select the paper size (by selecting a paper type) to which you'll print your information. You can also customize specific layout elements, such as the header, footer, page numbers, columns headings, and grid lines. Organizer uses default settings for all layout settings, but you can change them as needed.

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

{button ,AL(`;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_INCLUDING_SECTIONS_FROM_OTHER_ORGANIZER_FILES_DETAILS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_SELECTING_LAYOUT_OPTIONS_STEPS;H_SETTING_LAYOUT_PREFERENCES_DEF',0)} See related topics

Details: Selecting fonts for printing

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Selecting fonts in other ways
You can choose File - Print, select the section and layout to customize, click Layouts, and then click Styles to select text elements and change the fonts for text elements.

{button ,AL(`H_SELECTING_FONTS_STEPS',1)} Go to procedure

Selecting fonts for printing

You can select a font for any text element of a layout; for example, a header or footer.

1. Choose Edit - Layouts.

2. Click the Section drop-down box and select the section for which you want to customize the layout.
3. Click the Layouts drop-down box and select the layout you want to customize.
4. Click Styles.
5. Click the Element drop-down box and select the text element, such as a header or footer, for which you want to change the font.
6. Click Font.
7. Under Font, Font Style, and Size, select the appropriate options you want for the font.
8. (Optional) Under Effects, select Strikeout to include a line through the text or select Underline to underline the text.
9. (Optional) Under Effects, click the Color drop-down box and select a different color for the text. (The default color is black.)
10. Click OK.
11. Click OK.
12. Click OK.

{button ,AL(`H_SELECTING_FONTS_DETAILS',1)} See details

{button ,AL(`H_SELECTING_DIFFERENT_LAYOUTS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS;',0)} See related topics

Details: Customizing layouts

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Customizing a layout in other ways
You can choose File - Print, select the section and layout, click Layouts, and then customize the layout.

If OK is dimmed
If, after you've made your selections in the Layout dialog box, OK is dimmed, it may be because you selected a trifold layout, but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

{button ,AL(`H_SELECTING_INDIVIDUAL_LAYOUT_OPTIONS_STEPS',1)} Go to procedure

Customizing layouts

You customize a layout to change its orientation on the printed page and to specify what or how much information you want to print.

1. Choose Edit - Layouts.

2. Click the Section drop-down box and select the section for which you want to customize a layout.
3. Click the Layout drop-down box and select the layout you want to customize.
4. Select the printing orientation: Portrait or Landscape.
5. Under Preferences, select the options you want.
6. Click OK to save your changes.

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

{button ,AL(`H_SELECTING_INDIVIDUAL_LAYOUT_OPTIONS_DETAILS',1)} See details

{button ,AL(`H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS;H_SELECTING_FONTS_STEPS',0)} See related topics

Setting layout preferences

Option	Result
Print first line only	Prints only the first line of the description for each entry. (The default is to print the full description.)
Print icons	Prints (default) or doesn't print any icons that appear with entries — for example, the alarm icon or repeating entry icon.
Print month calendars	Prints (default) or doesn't print the monthly calendars for layouts that include monthly calendars.
Address	Specifies whether to print the Home address record, Business address record, Both home and business address records, or the Current address record when you're printing Address records.
	If you select Current, Organizer prints the the Address record you selected before choosing File - Print.

Setting the print orientation

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

Details: Setting up headers, footers, and titles

Keyboard shortcut
You can also press CTRL+Y to display the Layouts dialog box.

Adding codes to text elements
For text elements, you can select a code that formats and adds information in text elements. For example, there are codes that format dates and times; align text; add page numbers; and add the file name, section name, and/or the report heading.

To include a code in a text element, move the mouse pointer to where you want the code in the Text text box and click. This positions the insertion pointer, . Then, click the Codes drop-down box and select a code. Organizer adds the code at the location of the insertion pointer. If you know the command for a code, you can also type the command in the Text text box where you want it.

The following table lists the code names and commands (in parentheses), and the action each code performs.

Code	Action
Day as 1,2,3 (&d)	Displays the current day as a single digit, where appropriate.
Day as 01,02,03 (&dd)	Displays the current day as two digits.
Month as 1,2,3 (&M)	Displays the current month as a single digit, where appropriate.
Month as 01,02,03 (&MM)	Displays the current month as two digits.
Month as Jan, Feb (&MMM)	Displays the current month as a three-letter abbreviation.
Month as January, February (&MMMM)	Displays the full name of the current month.
Year as 96, 97 (&yy)	Displays the current year as a two-digit number.
Year as 1996,1997 (&yyyy)	Displays all digits of the current year.
First shown data (&e)	Displays the first item printed (depending on the layout, either a heading or data).
Last shown data (&q)	Displays the last item printed (depending on the layout, either a heading or data).
Hour as 1,2,3 (&h)	Displays the current hour as a single digit, where appropriate.
Hour as 01,02,03 (&hh)	Displays the current hour as two digits.
Minutes as 1,2,3 (&m)	Displays the current minute as a single digit, where appropriate.
Minutes as 01,02,03 (&mm)	Displays the current minute as two digits.
AM or PM suffix (&a)	Displays an AM or PM suffix based on the current time.
Align left (&l)	Left aligns all text that follows.
Align center (&c)	Centers all text that follows.
Align right (&r)	Right aligns all text that follows.
Page number (&p)	Displays page numbers.
File name (&f)	Displays the name of the current file.
Registered user name (&t)	Displays the name entered at installation of the current copy of Organizer.
Organizer release number (&v)	Displays the Organizer release number.
Section name (&s)	Displays the section name.
Layout name (&k)	Displays the name of the layout you're using.
Paper name (&z)	Displays the name of the paper type you're using.
Report heading (&H)	Displays the report heading of the current layout (for example, Quarterly Planner).
Page date range long (&D)	Displays the date range for the current printing in words (for example, February 9 - February 13, 1997), or for a range of one day, displays the day name and date (for example, Monday, February 10, 1997).

Page date range short (&j)	Displays the full date range in numeric format for the current printing (for example, 2/3/97 - 2/7/97).
Page date range short (&X)	Displays the date range for the current printing in numeric format (for example, 2/3 - 2/7/97).
Time (&T)	Displays the time for the current printing in numeric format (for example, 12:33 PM).
Today's date (&E)	Displays the date for the current printing in numeric format (for example, 10/8/96).

{button ,AL(`H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_STEPS',1)} Go to procedure
{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',0)} See related topics

Setting up headers, footers, and titles

You can customize text elements of a layout, such as the headers, footers, and titles; you can enter text as well as include Organizer codes. Organizer codes format and/or add information in text elements. For example, there are codes that format dates and times; align text; add page numbers; and add the file name, section name, and/or a report heading.

1. Choose Edit - Layout.

2. Click the Section drop-down box and select the section for which you want to customize the layout.
3. Click the Layout drop-down box and select the layout you want to customize.
4. Click Styles.
5. Click the Element drop-down box and select the text element you want to customize.
6. For Text, enter the text you want printed.
7. If necessary, click the Codes drop-down box and select a code for the text element.
   See details
8. Click the Background drop-down box and select a background color for the text element you selected.
9. Click the Pattern drop-down box and select a hatch pattern for the text element you selected.
10. Click OK.
11. Click OK.

{button ,AL(`H_SETTING_UP_HEADERS_FOOTERS_AND_TITLES_DETAILS',1)} See details

{button ,AL(`H_SELECTING_DIFFERENT_LAYOUTS_STEPS;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_CUSTOMIZING_THE_PAPER_SETTINGS_STEPS;H_SELECTING_FONTS_STEPS',0)} See related topics

Specifying codes (continued)

Code	Action
Align left (&l)	Left aligns all text that follows.
Align center (&c)	Centers all text that follows.
Align right (&r)	Right aligns all text that follows.
Page number (&p)	Displays page numbers.
Filename (&f)	Displays the name of the current file.
Registered user name (&t)	Displays the name entered at installation of the current copy of Organizer.
Organizer release number (&v)	Displays the Organizer release number.
Section name (&s)	Displays the section name.
Layout name (&k)	Displays the name of the layout you're using.
Paper name (&z)	Displays the name of the paper type you're using.
Report heading (&H)	Displays the report heading of the current layout (for example, Quarterly Planner).
Page date range long (&D)	Displays the date range for the current printing in words (for example, February 9 - 13, 1997), or when you're using one of the Daily layouts, the day name and date (for example, Monday, February 10, 1997).
Page date range short (&J)	Displays the full date range in numeric format for the current printing (for example, 2/3/97 - 2/7/97).
Page date range short (&X)	Displays the date range for the current printing in numeric format (for example, 2/3 - 2/7/97).
Time (&T)	Displays the time for the current printing in numeric format (for example, 12:33 PM).
Today's date (&E)	Displays the date for the current printing in numeric format (for example, 10/8/96).

Back

Specifying codes

Organizer inserts a text string command for each code. This command is in parentheses after the name of the code in this table.

Code	Action
Day as 1,2,3 (&d)	Displays the current day as a single digit, where appropriate.
Day as 01,02,03 (&dd)	Displays the current day as two digits.
Month as 1,2,3 (&M)	Displays the current month as a single digit, where appropriate.
Month as 01,02,03 (&MM)	Displays the current month as two digits.
Month as Jan, Feb (&MMM)	Displays the current month as a three-letter abbreviation.
Month as January, February (&MMMM)	Displays the full name of the current month.
Year as 96, 97 (&yy)	Displays the current year as a two-digit number.
Year as 1996,1997 (&yyyy)	Displays all digits of the current year.
First shown data (&e)	Displays the first item printed (depending on the layout, either a heading or data).
Last shown data (&q)	Displays the last item printed (depending on the layout, either a heading or data).
Hour as 1,2,3 (&h)	Displays the current hour as a single digit, where appropriate.
Hour as 01,02,03 (&hh)	Displays the current hour as two digits.
Minutes as 1,2,3 (&m)	Displays the current minute as a single digit, where appropriate.
Minutes as 01,02,03 (&mm)	Displays the current minute as two digits.
AM or PM suffix (&a)	Displays an AM or PM suffix based on the current time.

Continued

Specifying internal margins

Option	Result
Top	Lets you specify the amount of space to leave between the top of the print area and the first line of printed information.
Left	Lets you specify the amount of space to leave between the left edge of the print area and the left margin of the printed information. This setting indents printed information from the left edge of the print area.
Right	Lets you specify the amount of space to leave between the right edge of the print area and the right margin of the printed information. This setting indents printed information from the right edge of the print area.
Bottom	Lets you specify the amount of space to leave between the bottom edge of the print area and the last line of printed information.

Specifying layout options

Option	Result
Columns	Lets you specify a number of columns.
Width	Lets you enter a width for columns. By default, Organizer automatically adjust the width of columns based on the number of columns you specified and the margin settings.
Rows	Lets you specify a number of rows.
Height	Lets you enter a height for rows. By default, Organizer automatically adjusts the height of rows based on the number of rows you specified and the margin settings.

Specifying margins

Option	Result
Top	Lets you enter a margin from the top of the paper to the top of the print area.
Left	Lets you enter a margin from the left edge of the paper to the left of the print area.
Right	Lets you enter a margin from the right edge of the paper to the right of the print area.
Bottom	Lets you enter a margin from the bottom of the paper to the bottom of the print area.

Details: Deleting an appointment

Keyboard shortcuts
You can also select an appointment and press CTRL+X or press DEL to delete an appointment.

Deleting an appointment in other ways
You can also select an appointment and choose Edit - Cut or click to delete an appointment.

{button ,AL(`H_DELETING_AN_APPOINTMENT_STEPS',1)} Go to procedure
{button ,AL(`H_PASTING_AN_ORGANIZER_ENTRY_FROM_CLIPBOARD_STEPS;',0)} See related topics

Deleting an appointment

1. Select the appointment in Calendar you want to delete.
2. Drag and drop the appointment to  in Toolbox.

{button ,AL(`H_DELETING_AN_APPOINTMENT_DETAILS',1)} See details

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;H_FINDING_TIME_STEPS',0)} See related topics

Details: Editing an appointment

Editing an appointment in other ways
You can also select the appointment, and choose Edit - Edit Appointment or press CTRL+E to edit the appointment.

To change just the date of an appointment, drag and drop the appointment to the new date. To edit the time, duration, or description of an appointment, select the appointment, then click the description. The insertion pointer  appears in the description and Time Tracker appears over the Organizer rings.

When you are working with time slots in the Day per page view, you can also position the mouse pointer on the appointment and click to edit the description, change the start time by dragging the appointment to another time, or change the duration by dragging the appointment's top or bottom border.

Editing the date, time, and duration of the appointment
To change the date, you can click the Date drop-down box to display a monthly calendar, then click a date in the calendar. To move to the previous or next month, click the arrows at the top of the calendar. You can also click the Date text box, then press and ↓ to change to the previous or next day, or enter a date in the Date text box.

To change the start time and duration, you can click the Time drop-down box to display Time Tracker and specify a time and duration, or, in the Duration box, click the + (plus) to increase and - (minus) to decrease the duration. You can also click in the Time or Duration text box and press and ↓ to change the time and duration or enter a time or duration.

Editing the description
Position the mouse pointer over the description, then click and enter the changes.

Editing the options
Click the Categories drop-down box and select a category for the appointment.

Select or deselect the options Warn of conflicts, Pencil in, or Confidential to change the options.

Editing the existing text of an appointment
To edit the existing appointment text, click the appointment to select it, click the text you want to edit, and make the changes. When you're done, press F2 to enter the changes.

{button ,AL(`H_EDITING_AN_APPOINTMENT_STEPS',1)} Go to procedure

{button ,AL(`H_USING_TIME_TRACKER_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_SCHEDULING_A_MEETING_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER',0)} See related topics

Editing an appointment

1. Double-click the appointment.
2. Edit the appointment.

   See details
3. Click OK.

{button ,AL(`H_EDITING_AN_APPOINTMENT_DETAILS',1)} See details

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;H_FINDING_TIME_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Details: Finding time

Changing start-of-day and end-of-day default settings
When finding available time, Organizer uses the default start-of-day and end-of-day settings in your Calendar. To change the time your days in Calendar start or end, you must change the setting with another procedure. Choose View - Calendar Preferences and click the Days start at or Days end at drop-down boxes to select new times, and then return to this procedure.

Including weekends
If you want Organizer to include weekends when it looks for an appointment time, you must change the settings with another procedure. Choose View - Calendar Preferences and select the Include weekends in Find time search option, and then return to this procedure.

{button ,AL(`H_FINDING_TIME_STEPS',1)} Go to procedure

Finding time

There are occasions when you need to schedule an appointment for whenever you are next available. You specify the duration for the appointment, and let Organizer find the next available time slot in your schedule. Organizer searches through each day, looking for an opening for the specified duration.

1. Go to the Calendar section and choose Create - Appointment.

2. If necessary, specify the Date on which you want Organizer to begin the search for free time.
3. Click the Duration + (plus) to increase or - (minus) to decrease the duration for the appointment.
4. Click Find Time.

   The Date and Time settings in the dialog box change to show the next available time for the appointment.

   See details.
5. If necessary, repeat step 4 to search for another available time.
6. Enter any other information for the appointment.
7. Click OK.

{button ,AL(`H_FINDING_TIME_DETAILS',1)} See details

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;',0)} See related topics

Details: Making an appointment

Creating an appointment in other ways
When you are in the Calendar section, you can also choose Create - Appointment or press INS to create an appointment.

Note In the Day per page view, if the appointment time slots are displayed, you can click an appointment time or a time slot and start entering your information for that time. Press F2 or click outside the appointment to enter it. If you then want to change the duration of the appointment, drag the top and/or bottom border to the appropriate time.

Specifying the date of an appointment
You can click the Date drop-down box to display a monthly calendar, then click a date in the calendar. To move to the previous or next month, click the arrows at the top of the calendar. You can also click the Date text box, then press and ↓ to change to the previous or next day, or enter a date in the Date text box.

You can also drag and drop  (in Toolbox) to the date on the Calendar page you want. The date you drag to appears in the Create appointment dialog box.

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS',1)} Go to procedure

{button ,AL(`H_USING_TIME_TRACKER_STEPS;H_WORKING_WITH_TIME_SLOTS_IN_DAY_PER_PAGE_VIEW_OVER;',0)} See related topics

Making an appointment

1. Go to Calendar and double-click the Calendar page on the date of the appointment.

2. If necessary, click the Date drop-down box and select a date for the appointment.

   See details

3. Click the Time drop-down box to use Time Tracker to select a time for the appointment to start and end.
4. If necessary, click the Duration + (plus) to increase or - (minus) to decrease the duration of the appointment.
5. Under Description, enter a description of the appointment.
6. (Optional) You can select the following options for the appointment: Categories, Warn of conflicts, Pencil in, and Confidential.
7. Click OK.

Tip To create additional appointments, click Add before you click OK. When you finish entering appointments, click OK.

{button ,AL(`H_MAKING_AN_APPOINTMENT_DETAILS',1)} See details

{button ,AL(`H_EDITING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;H_FINDING_TIME_STEPS;H_USING_TIME_TRACKER_STEPS;H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_CREATING_A_REPEATING_ENTRY_STEPS;H_ASSIGNING_A_COST_CODE_TO_AN_ENTRY_STEPS;H_SCHEDULING_A_MEETING_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;',0)} See related topics

Moving an appointment to a different day

When you move an appointment to another day, the appointment keeps the same start time and duration.

1. Go to the appointment in Calendar you want to move.
2. Click  in Toolbox.
3. Select the appointment you want to move by clicking it.

   The mouse pointer changes to 
4. Go to the day you want to move the appointment to.
5. Click that day to move the appointment.

Tip To move an appointment to a day that already appears on the screen, drag and drop the appointment to the new day. To move an appointment to a different Calendar section but keeping the same date and time of the appointment, drag and drop the appointment to the section tab for the different Calendar section.

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS;H_FINDING_TIME_STEPS;H_COPYING_A_SINGLE_ENTRY_STEPS;H_COPYING_MULTIPLE_ENTRIES_STEPS;H_MOVING_AROUND_IN_CALENDAR_STEPS;',0)} See related topics

Details: Resolving conflicting appointments

Changing the date, time, and duration

To change the date, you can click the Date drop-down box to display a monthly calendar, then click a date in the calendar. To move to the previous or next month, click the arrows at the top of the calendar. You can also click the Date text box, then press and ↓ to change to the previous or next day, or enter a date in the Date text box.

To change the start time and duration, you can click the Time drop-down box to display Time Tracker and specify a time and duration, or, in the Duration box, click the + (plus) to increase and - (minus) to decrease the duration. You can also click in the Time or Duration text box and press and ↓ to change the time and duration or enter a time or duration.

Displaying conflicting appointments

Organizer displays a red line to the left of conflicting appointments. The exception to this is when you are working with time slots in the Day per page view. In this view, Organizer displays the conflicting appointments side-by-side.

Turning the alert on and off

The default setting is to alert you when you are creating a schedule conflict. If you prefer not to be alerted, choose View - Calendar Preferences and deselect the option to Show conflicts.

Note In the Day per page view, if you are working with time slots and click either a time slot or a time in the time ruler to create an appointment, Organizer doesn't notify you of an appointment conflict. Because you can view the conflict, it's assumed you are scheduling it intentionally.

{button ,AL(`H_RESOLVING_CONFLICTING_APPOINTMENTS_STEPS',1)} Go to procedure
{button ,AL(`H_USING_TIME_TRACKER_STEPS;',0)} See related topics

Resolving conflicting appointments

When you are about to create a conflicting appointment, Organizer displays the Conflicting Appointment dialog box. You can either schedule the appointment as a conflict, or resolve the conflict. To schedule the appointment as a conflict, click OK. To resolve the conflict, perform the following steps.

1. Do one of the following:
   - Change the date, time, or duration of the appointment.

     See details
   - Click Find Time and Organizer will automatically find the next available time after the conflicting appointment.
   - Click Turn To to display the date of the conflicting appointment to see other appointments and available times.
2. Click OK to accept the changes and schedule the appointment or click Cancel to leave the dialog box without scheduling the appointment.

{button ,AL(`H_RESOLVING_CONFLICTING_APPOINTMENTS_DETAILS',1)} See details

{button ,AL(`H_MAKING_AN_APPOINTMENT_STEPS;H_EDITING_AN_APPOINTMENT_STEPS;H_MOVING_AN_APPOINTMENT_TO_A_DIFFERENT_DAY_OR_TIME_STEPS;H_DELETING_AN_APPOINTMENT_STEPS;H_FINDING_TIME_STEPS;',0)} See related topics

Selecting appointment options

Option	Result
Categories	Lets you establish one or more categories for the appointment.
Warn of conflicts	Alerts (default) or doesn't alert you when there is a conflict with the appointment and another appointment or meeting.
Pencil in	Tentatively enters the appointment.
Confidential	Makes or doesn't make (default) the appointment confidential, so others who have access to your file cannot view the appointment.

Details: Displaying entries in more than one section

Selecting a color to represent Calendar information in Planner

You can show Calendar information (which appears as a color band) in the Planner section so that you can see your commitments grouped in one place. To help you quickly identify Calendar information in Planner, you may want to color code the Calendar information (band). For example, you may want to represent Calendar information (the color band) by using text in the same color that the Calendar section tab uses.

To select a color, click the Shown through appointment color drop-down box.

{button ,AL(`H_DISPLAYING_ENTRIES_IN_MORE_THAN_ONE_SECTION_STEPS',1)} Go to procedure

Displaying entries in more than one section

You can show To Do tasks, Calls entries, Planner events, and Anniversary entries in the Calendar section, and you can show Calendar entries in the Planner section.

1. From any Organizer section, choose Section - Show Through.

2. Click the Show into drop-down box and select either Calendar or Planner.
3. Under From, select the section(s) whose information you want to appear in Calendar or Planner.
4. Click Preferences.

   If you are showing information into Calendar, the Calendar Show Through Preferences dialog box appears.

   If you are showing information into Planner, the Planner Show Through Preferences dialog box appears.
5. Depending on your selection in step 4, do the appropriate step, below.
   - For Calendar Preferences, select the appropriate options for the way in which you want your information from other sections to appear in Calendar and click OK.
   - For Planner Preferences, select the color you want to represent your Calendar information and click OK.

     See details
6. Click OK.

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

{button ,AL(`H_DISPLAYING_ENTRIES_IN_MORE_THAN_ONE_SECTION_DETAILS',1)} See details

{button ,AL(`;H_CREATING_AN_ENTRY_STEPS;H_INSERTING_A_CALL_STEPS;H_INSERTING_A_PLANNER_EVENT_STEPS;H_INSERTING_A_TO_DO_TASK_STEPS;H_INSERTING_AN_ANNIVERSARY_STEPS',0)} See related topics

Specifying the display of show through entries in Calendar

Option	Results
Above appointments	Displays information from other sections above Calendar appointments (default).
Below appointments	Displays information from other sections below Calendar appointments.
First line only	Displays only the first line of information from other sections above or below Calendar appointments.

Note Planner events appear in Calendar as labeled strips of color. For example, a red strip labeled Vacation, a yellow strip labeled Meeting, and so on.

Details: Ending Organizer

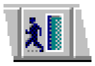
Ending Organizer in other ways

You can also press ALT+F4, click  to leave Organizer.

{button ,AL(`H_ENDING_ORGANIZER_STEPS',1)} Go to procedure

Ending Organizer

1. Choose File - Exit Organizer.



2. If Organizer warns you that the current file contains changes you haven't saved, click the appropriate command button.

{button ,AL(`H_ENDING_ORGANIZER_DETAILS',1)} See details
{button ,AL(`H_STARTING_ORGANIZER_STEPS;',0)} See related topics

Overview: Introducing Organizer

Organizer 97 integrates an on-screen calendar, to do list, address book, phone call manager, planner, notepad, and anniversary reminder. Organizer lets you stay on top of your schedule, manage your contacts, organize your ideas and information, and more.

With Organizer you can do the following:

- Use the Calendar section to book and set alarms for your appointments.
- Use the To Do section to create and prioritize task lists.
- Use the Address section to keep track of home and business addresses and phone numbers.
- Use the Calls section to keep track of incoming and outgoing calls.
- Use the Planner section to monitor long-term events or projects, such as conferences or vacations.
- Use the Notepad section to jot down ideas or import files (including text, numbers, graphics or, if you have a World Wide Web browser, home pages).
- Use the Anniversary section to enter and set alarms for important birthdays, anniversaries, or special occasions.
- Print your work in 33 different print layouts, including monthly calendars and trifolds, or customize a layout to fit in your day planner.
- Work with Organizer away from your network on a notebook computer and later merge your changes back into your PC or network at work.
- Create categories for entries and assign them customer and cost codes.
- Archive information from any section to streamline your Organizer file.

{button ,AL(`H_STARTING_ORGANIZER_STEPS;H_ABOUT_NOTEPAD_OVER;H_ABOUT_CALLS_OVER;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_SAVING_AN_ORGANIZER_FILE_STEPS;H_OPENING_AN_ORGANIZER_FILE_AUTOMATICALLY_STEPS;H_ENDING_ORGANIZER_STEPS;H_ABOUT_ADDRESS_OVER;H_ABOUT_ANNIVERSARY_OVER;H_ABOUT_CALENDAR_OVER;H_ABOUT_PLANNER_OVER;H_ABOUT_THE_ORGANIZER_WORKSPACE_OVER;H_USING_HELP_TO_LEARN_ABOUT_ORGANIZER_OVER',0)} See related topics

Starting Organizer

1. Start Windows 95.
2. Click the Start button and go to where you installed Organizer 97.

   For example, you may have installed Organizer 97 in the Lotus Applications folder. If not, go to the place where you installed it.
3. If you are using TeamMail, start your mail system, enter your user ID or login name, and, if necessary, your password and path, or post office information.

{button ,AL(`H_ENDING_ORGANIZER_STEPS',0)} See related topics

Saving changes

Command Button	Result
Yes	Saves your changes before ending Organizer.
No	Discards your changes and ends Organizer.
Cancel	Removes the dialog box and lets you continue to work in Organizer.

Details: Exporting an entry

Selecting from the Field mapping drop-down box
The Organizer default for exporting files is to map all fields from the Organizer file to fields in the export file. The Field mapping drop-down box contains the Organizer default field-mapping selection All fields. The Field mapping drop-down box also contains the names of any field-mapping selections that you created, named, and saved. To select an existing field mapping, click the Field mapping drop-down box and select the name you want.

Understanding field mapping
When you export information, you're copying from an Organizer file to a file for use in another application. When you map fields, you're selecting which fields from the Organizer file to copy to which locations in the export file. For example, if you're exporting information from Calendar, you may want to export only Start Date Time, End Date Time, and Description. You would map these fields to Field 1, Field 2, and Field 3 in the export file.

Mapping fields for exporting
To map fields, select a field in the Fields in Organizer section information box and then select a field in the Fields in export file information box. A line between the fields appears, showing where the Organizer section information will appear in the export file.

Note If you map to the wrong export file field, select the correct field before you map the next field. If you map the wrong Organizer section field, click the Organizer section field to break the mapping, and then resume the mapping process.

Saving field-mapping selections
When you map fields, you can save the field-mapping selections you created for future use -- without needing to repeat the actual field mapping. If you export the same type of information to the same applications on a frequent basis, saving the field-mapping selections you create is very useful. For example, if you export Calendar information to a word processing application where you keep weekly meeting agendas and notes, the fields you map from and to are always the same. Save the field-mapping selections to use each time you export that information.

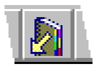
To save field-mapping selections and add the name to the Field mapping drop-down box, select All fields and enter a new name for the field mapping selections you want to save (because All fields is the default, entering a new name won't delete that mapping option). Map the fields you want and then click Add.

{button ,AL(`H_EXPORTING_AN_ENTRY_STEPS',1)} Go to procedure

Exporting an entry

You can export Organizer information for use in another application. If you want to export information, you must export it in a format that the other application understands. Organizer provides several formats, including ASCII text and dBASE files, that many applications support.

1. Choose File - Export.



2. Click the Look in drop-down box and select the path Organizer must use to export the information.
3. For File name, enter the name of the file you want to export.
4. Click the Files of type drop-down box and select the type of file you want to export.
5. Click the From section drop-down box and select the section from which you want to export information.
6. Click the Field mapping drop-down box and select the field mapping you want to use.
   See details
7. Click Mapping to map specific fields and save your field-mapping selections.
   See details
8. Click the appropriate command buttons to modify field-mapping selections.
9. Click OK.
10. Click Options to select additional export options.
11. Click OK.
12. Click Export.

Note To export a subset of information, apply a filter to the section before you export the information.

{button ,AL(`H_EXPORTING_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_FILTER_STEPS;H_FILTERING_SELECTED_NAMES_AND_ADDRESSES_STEPS;H_MAPPING_FIELDS_WHILE_IMPORTING_OR_EXPORTING_ENTRIES_STEPS;H_IMPORTING_AN_ENTRY_STEPS;',0)} See related topics

Details: Importing an entry

Selecting from the Field mapping drop-down box
The Organizer default for importing files is to map all fields from the import file to fields in the Organizer section. The Field mapping drop-down box contains the Organizer default field-mapping selection All fields. The Field mapping drop-down box also contains the names of any field-mapping selections that you created, named, and saved. To select an existing field mapping, click the Field mapping drop-down box and select the name you want.

Understanding field mapping
When you import information, you're copying from a file created in another application to a section in an Organizer file. When you map fields, you're selecting which fields from the import file to copy to which fields in the Organizer section. For example, if you're importing name and address information into Address, you'll want to map the fields in the import file to the matching fields in the Organizer Address section. You can map specific fields rather than all fields. For example, you can import a file from an application whose fields are named differently from the fields in Organizer, or you can import only a portion of the information contained in the import file, such as name and telephone number.

Mapping fields for importing
To map fields, select a field in the Fields in import file information box and then select a field in the Fields in Organizer section information box. A line between the fields appears, showing where the import file information will appear in the Organizer section.

Note If you map to the wrong Organizer section field, select the correct field before you map the next field. If you map the wrong import file field, click the import file field to break the mapping, and then resume the mapping process.

Saving field-mapping selections
When you map fields, you can save the field-mapping selections you created for future use -- without needing to repeat the actual field mapping. If you import the same type of information to the same sections on a frequent basis, saving the field-mapping selections you create is very useful. For example, if you import weekly meeting agendas and notes to Notepad, the fields you map from and to are always the same. Save the field-mapping selections to use each time you import that information.

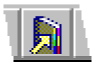
To save field-mapping selections and add the name to the Field mapping drop-down box, select All fields and enter a new name for the field mapping selections you want to save (because All fields is the default, entering a new name won't delete that mapping option). Map the fields you want and then click Add.

{button ,AL(`H_IMPORTING_AN_ENTRY_STEPS',1)} Go to procedure

Importing an entry

You can import entries from ASCII text files, dBASE, and FoxPro. Most databases, word processors, and spreadsheets export data in one of these formats.

1. Choose File - Import.



2. Click the Look in drop-down box and select the path Organizer must use to import the information you want.
3. For File name, enter the name of the file you want to import.
4. Click the Files of type drop-down box and select the type of file you want to import.
5. Click the Into section drop-down box and select the section into which you want to import information.
6. Click the Field mapping drop-down box and select the field mapping you want to use.
   See details
7. Click Mapping to map specific fields and save your field-mapping selections.
   See details
8. Click the appropriate command buttons to modify field-mapping selections.
9. Click OK.
10. Click Options to select additional import options.
11. Click OK.
12. Click Import.

{button ,AL(`H_IMPORTING_AN_ENTRY_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_FILTER_STEPS;H_FILTERING_SELECTED_NAMES_AND_ADDRESSES_STEPS;H_EXPORTING_ADDRESS_RECORDS_FROM_THE_ADDRESS_SECTION_STEPS;H_MAPPING_FIELDS_WHILE_IMPORTING_OR_EXPORTING_ENTRIES_STEPS;H_EXPORTING_AN_ENTRY_STEPS;H_IMPORTING_ADDRESS_RECORDS_INTO_THE_ADDRESS_SECTION_STEPS',0)} See related topics

Details: Changing field-mapping selections for import or export

Selecting from the Field mapping name drop-down box

The Field mapping name drop-down box contains the Organizer default field-mapping selection All fields. It also contains the names of those field-mapping selections that you created, named, and saved. To select a field map, click the Field mapping name drop-down box and select the name you want.

Adding field-mapping selections

When you map fields, you can save the field-mapping selections you create for future use -- without needing to repeat the actual field map. If you import or export the same type of information to the same applications on a frequent basis, saving the field-mapping selections you create is very useful.

To add any field-mapping selections to the Field mapping name drop-down box, select All fields and enter a new name for the field-mapping selections you want to save (because All fields is the default, entering a new name won't delete that mapping option). Map the fields you want and then click Add. The field map you saved is added to the Field mapping name drop-down box.

Removing field-mapping selections

To remove any field-mapping selections you added to the Field mapping name drop-down box, select the name you want to remove and click Remove.

Changing field-mapping selections using Update, Clear All, and Map All

To update any field-mapping selections you added to the Field mapping name drop-down box, select the name you want to update. Make changes to the field mappings and then click Update.

While updating field-mapping selections, you may find it easier to clear all existing mappings. To clear all field-mapping selections, click Clear All. If you want to map all fields from one file, in sequence, to all fields in the other file, click Map All.

{button ,AL(`H_MAPPING_FIELDS_WHILE_IMPORTING_OR_EXPORTING_ENTRIES_STEPS',1)} Go to procedure

Changing field-mapping selections for import or export

1. Choose File - Import or choose File - Export.
2. Complete all steps necessary for importing or exporting an entry except for mapping fields.
3. Click Mapping to create or change field-mapping selections.

   See details
4. Click OK.

{button ,AL(`H_MAPPING_FIELDS_WHILE_IMPORTING_OR_EXPORTING_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_EXPORTING_AN_ENTRY_STEPS;H_IMPORTING_AN_ENTRY_STEPS;H_CREATING_A_FILTER_STEPS;H_FILTERING_SELECTED_NAMES_AND_ADDRESSES_STEPS;',0)} See related topics

Using export file options

Option	Results
Translate CR/LF to	Translates or doesn't translate (default) the CR/LF (or carriage return/line feed) character in Organizer files to any of the following characters the target application can interpret: CR, LF, LF/CR, SPACE, or TAB.
Delete exported records	Automatically deletes or doesn't delete (default) the record from Organizer after you have exported it.
Field names as first record	Exports or doesn't export (default) field names as the first line in the exported file. This option is available if you're exporting in ASCII Text file format only.

Using export mapping command buttons

Command button	Result
Map All	Connects, in sequence, all fields in the Organizer section to all fields in the export file, exactly as you see the fields listed side-by-side in the Export Mapping dialog box.
Clear All	Clears all field mappings for the specified field-mapping name.
Add	Adds the specified field-mapping name you created to the list of available mappings in the Field mapping drop-down box.
Remove	Removes the specified field-mapping name from the list of available mappings in the Field mapping drop-down box.
Update	Updates the specified field-mapping name with current field mappings.

Using import file options

Option	Results
File translation	Translates the file you're importing with a format Organizer can accept. (Windows (ANSI) is the default translation.)
Ignore duplicate records	Ignores or doesn't ignore (default) any existing records in Organizer that are duplicates of the record you are importing.
Field names as first record	Imports or doesn't import (default) field names first. This option is available if you're importing in ASCII Text file format only and the field names are at the beginning of the file.

Using import mapping command buttons

Command button	Result
Map All	Connects, in sequence, all fields in the import file to all fields in the Organizer section, exactly as you see the fields listed side-by-side in the Import Mapping dialog box.
Clear All	Clears all field mappings for the specified field-mapping name.
Add	Adds the specified field-mapping name you created to the list of available mappings in the Field mapping drop-down box.
Remove	Removes the specified field-mapping name from the list of available mappings in the Field mapping drop-down box.
Update	Updates the specified field-mapping name with current field mappings.

Finding text command buttons

Command button	Result
Find Next	Finds the next entry within which the specified text appears.
Find All	Finds all entries within which the specified text appears.
Close	Closes the Find dialog box.
Turn To	Turns to the entry you select.

Details: Finding text

Keyboard shortcuts
You can also press CTRL+F to find and move to a specific text entry.

Using the Case sensitive and Whole word options
Depending on what you're looking for, you can enter a few characters, a word, or a phrase to find. The Case sensitive option searches for text that matches exactly with the case in the text you enter. For example, if you're looking for "Principal," you might enter Principal with an uppercase P and select the Case sensitive option. That way, you wouldn't find any lowercase occurrences of principal. The Whole word option searches for text that matches what you enter in whole words specifically, not just part of a word. For example, if you enter the word bank and you select the Whole word option, you will find only bank as a whole word; that is, you won't find banks, banking, or Bankston. If you don't select either option, the default is to search for any text you enter, regardless of case sensitivity or whole word status.

Finding text in a section or all sections
You can find text from any section of Organizer. If you go to the section in which you want to look for text, the default will be to look in that section. For example, if you know that you want to look for a name in the Address section, you can go to Address to begin your find. Alternatively, you can begin from any section and then select the section you wish to search or select all sections.

Understanding how the Occurrences box works
Entries that match your text search appear in the Occurrences box. Occurrences displays your matches in either of two ways: one text match at a time or all text matches in a list. For example, if you search for the word Bank, Organizer finds all entries containing the word Bank. You can use the word Bank as a last name in one entry, as the name of a company in the next entry, and as the name of a street address in another entry. Under Occurrences, select the entry you want to see, click Turn To, and Organizer goes to the entry you selected.

After a find, you can select to clear the list of occurrences are append any newly found matches to the list. For example, if you have found 3 matches for bank, and you'd like to also find entries containing savings, you can select the Append to list option to add the new matches to the 3 in the Occurrences box.

Using the Find Next and Find All command buttons
When you click Find Next, Organizer finds one entry at a time for you and turns to that entry. If you want Organizer to find all matches and display them for you as a list, click Find All. All matching entries will appear in Occurrences. If no match is found, Organizer displays a message saying the text you're searching for can't be found.

Finding information with filters
You can also find information in Organizer sections with filters. A filter is a tool that allows you to display a subset of your Organizer entries based on criteria you specify. You can create filters based on text, numbers, dates, Organizer attributes (such as cost code or category) or any combination of these.

{button ,AL(`H_FINDING_TEXT_STEPS',1)} Go to procedure

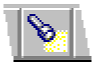
Finding text in Organizer

Option	Result
Find	Uses the text you enter to locate the specific entry.
Case sensitive	Searches for an exact text match, including capitalization you use.
Whole word	Searches for whole words specifically, not just a part of a word.
Section	Searches for text within the Organizer section you specify.
All sections	Searches for text within all sections of Organizer.
Occurrences	Lists the entries within which the text match was found.
Clear list	Clears the list after each text search is completed (default).
Append to list	Maintains a list of all text search matches.

Finding text

You can find specific text in any entry in any Organizer section by entering the same text contained in the entry you want to find.

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



2. For Find, enter the text you want to find.

   See details

3. Select the appropriate options.
4. Click the appropriate command button.

Note You can also use Filters to find entries containing text or matching other criteria that you specify.

{button ,AL(`H_FINDING_TEXT_DETAILS',1)} See details
{button ,AL(`H_CREATING_A_FILTER_STEPS;H_APPLYING_A_FILTER_STEPS;',0)} See related topics

Overview: New features in Organizer

Organizer offers a Windows 95 look and feel, with features such as common dialogs, long file names, and registry support. Organizer also offers enhancements to its personal information management (PIM) features.

This release includes the following enhancements:

Calendar

- A new Day per Page view using time slots and a time ruler that lets you graphically display and block time for your appointments. See Overview: Working with time slots in Day per page view.

Address

- Improved features for entering and editing addresses.
- Address label and envelope printing for International address formats. See Changing the address envelope and/or label format.

Calls

- Support for TAPI dialing, which means more streamlined automatic number dialing capabilities in both the Calls and the Address sections. See Dialing a number.

Notepad

- Rich text formating, such as bold, italic, underlining, and font size, type, and color.
- Support for linking and embedding OLE objects (such as spreadsheets, metafiles, word processing documents, presentations, and, if you have a World Wide Web browser (Web), Web sites and home pages) on Notepad pages. See Overview: Sharing information using OLE in Notepad.

General

- An Organizer Tour that gives you an overview of the product.
- Easy conversion process of Organizer 1.x and Organizer 2.x files to Organizer 97 files (with the new .OR3 extension. See Overview: Converting an Organizer file from a previous release.
- Support for sending mail without leaving Organizer by using TeamMail and your electronic mail system.
- New shortcut menus that you display by clicking the right mouse button. The menus display context-sensitive shortcuts specific to the location of the mouse pointer and to the Organizer section that is open. See Shortcut menus.
- New ways to set access rights to your file using passwords. See Overview: Sharing your files.
- Professional-looking printout that combines information from several sections. For example, print your Calendar appointments and To Do tasks in a trifold printout.
- Features such as animated mouse pointers and sounds.

Starting another application from Organizer

You can start an application from the Calendar, To Do, Calls, Planner, and Anniversary sections. Starting an application works in conjunction with setting an alarm.

1. Create or edit an entry.
2. Click Alarm.
3. In the Start text box, enter the path and file name of the application you want to start.

   If necessary, click Browse to see a listing of available applications to select one, and then click Open.
4. Click OK.
5. Click OK.

{button ,AL(`H_SETTING_ALARMS_FOR_AN_ENTRY_STEPS;H_ATTACHING_A_SCRIPT_TO_AN_ICON_STEPS;H_LINKING_TO_A_FILE_OR_APPLICATION_STEPS',0)} See related topics

Details: Moving between entries

Moving between entries in other ways

To move between Organizer entries, press , ↓, →, or ← , click , and/or press TAB.

{button ,AL(`H_MOVING_BETWEEN_ENTRIES_STEPS',1)} Go to procedure

Moving between entries

You can move to any entry you want by positioning your mouse pointer on the entry and clicking.

{button ,AL(`H_MOVING_BETWEEN_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_STEPS;H_MOVING_TO_A_SPECIFIC_DATE_STEPS;H_MOVING_TO_A_SPECIFIC_ENTRY_STEPS;H_ABOUT_KEYBOARD_SHORTCUTS_OVER;H_ABOUT_MOUSE_SHORTCUTS_OVER',0)} See related topics

Details: Moving between sections

Keyboard shortcuts
You can also press CTRL+G and make a selection to move between Organizer sections.

Selecting date, status, name, year, and page
When you choose Edit - Go To and select a section, you can specify where within the section you want to go to. Specify Date for the Calendar and Anniversary sections, Status for the To Do section, Last name or Name for the Address or Calls sections, Year for the Planner section, and Page for the Notepad section.

Using the Turn To command button
When you're in the Go To dialog box, click Turn To when you want to go to a specific section without closing the dialog box.

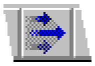
Note When you are in the To Do section and choose Edit - Go To, Status is the default, but you can also specify Priority, Start date, Category, Due date, or Completion date because Edit - Go To in the To Do section works in conjunction with how your To Do tasks are sorted.

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_STEPS',1)} Go to procedure

Moving between sections

The quickest way to move to a section is to click the section tab. You can use Edit - Go To to move to a specific section, status, name, or page in a section.

1. Choose Edit - Go To.



2. Click the Section drop-down box and select the section you want to go to.
3. Select the date, status, name, year, or page you want to go to.

   See details
4. Click OK.

Tip You can also move between sections by choosing Section - Turn To and selecting a section from the menu that appears. If there are more sections than can fit in the menu, Organizer displays a dialog box that lists all sections. Select a section and click OK to move to the section.

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_DETAILS',1)} See details

{button ,AL(`H_MOVING_BETWEEN_ENTRIES_STEPS;H_MOVING_TO_A_SPECIFIC_DATE_STEPS;H_MOVING_TO_A_SPECIFIC_ENTRY_STEPS',0)} See related topics

Moving to a specific date

1. Click the Calendar section tab.

   The calendar for the current year appears with today's date outlined.

2. Double-click the date you want to turn to.

Note To display the calendar for a different year, click the year tab along the left or right side of the current year calendar.

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_STEPS;H_MOVING_BETWEEN_ENTRIES_STEPS;H_MOVING_TO_A_SPECIFIC_ENTRY_STEPS',0)} See related topics

Details: Moving to a specific entry

Keyboard shortcuts
You can also press CTRL+F to find and move to a specific text entry.

Using the Case sensitive and Whole word options
Depending on what you're looking for, you can enter a few characters, a word, or a phrase to find. The Case sensitive option searches for text that matches exactly with the case in the text you enter. For example, if you're looking for "Principal," you might enter Principal with an uppercase P and select the Case sensitive option. That way, you wouldn't find any lowercase occurrences of principal. The Whole word option searches for text that matches what you enter in whole words specifically, not just part of a word. For example, if you enter the word bank and you select the Whole word option, you will find only bank as a whole word; that is, you won't find banks, banking, or Bankston. If you don't select either option, the default is to search for any text you enter, regardless of case sensitivity or whole word status.

Finding text in a section or all sections
You can find text from any section of Organizer. If you go to the section in which you want to look for text, the default will be to look in that section. For example, if you know that you want to look for a name in the Address section, you can go to Address to begin your find. Alternatively, you can begin from any section and then select the section you wish to search or select all sections.

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When you click Find Next, Organizer finds one entry at a time for you and turns to that entry. If you want Organizer to find all matches and display them for you as a list, click Find All. All matching entries will appear in Occurrences. If no match is found, Organizer displays a message saying the text you're searching for can't be found.

{button ,AL(`H_MOVING_TO_A_SPECIFIC_ENTRY_STEPS',1)} Go to procedure

Moving to a specific entry

You can move to a specific entry of any Organizer section by entering the same text that is in the entry you want to go to. The text can come from within any field of the entry.

1. Choose Edit - Find.
2. For Find, enter the text that you want to find.

   See details
3. Select the appropriate options.
4. Click the appropriate command button.

{button ,AL(`H_MOVING_TO_A_SPECIFIC_ENTRY_DETAILS',1)} See details

{button ,AL(`H_MOVING_BETWEEN_SECTIONS_STEPS;H_MOVING_BETWEEN_ENTRIES_STEPS;H_MOVING_TO_A_SPECIFIC_DATE_STEPS;',0)} See related topics

Moving to specific entries

Option	Result
Find	Uses the text you enter to locate the specific entry.
Case sensitive	Searches for an exact text match, including capitalization you use.
Whole word	Searches for whole words specifically, not just a part of a word.
Section	Searches for text within the Organizer section you specify.
All sections	Searches for text within all sections of Organizer.
Occurrences	Lists the entries within which the text match was found.
Clear list	Clears the list after each text search is completed (default).
Append to list	Maintains a list of all text search matches.

Using commands to move to specific entries

Command button	Result
Find next	Finds the next entry within which the specified text appears.
Find all	Finds all entries within which the specified text appears.
Close	Closes the Find dialog box.
Turn To	Turns to the entry you select.

Overview: Organizer and the Internet

In Organizer, if you have one of the supported World Wide Web (the Web) browsers on your computer, you can go to the Lotus home pages on the Web without leaving Organizer. The supported browsers are Netscape and the Microsoft Internet Explorer. Organizer includes Internet menu items (on the Help menu) that let you go quickly to the Lotus home page, the Lotus Customer Support home page, and the Lotus Customer Support FTP site. Organizer also includes Internet SmartIcons that you can add to your SmartIcon set.

You can also embed a Lotus home page (or any other home page) on a Notepad page, providing you easy access to Internet resources and information from within Organizer. For more information about embedding an OLE object, see Creating a new OLE object in Notepad.

Lotus home page

The Lotus home page provides a place where you can learn more about Lotus and Lotus products. From the Lotus home page you can do the following activities:

- Search the Lotus Web site for topics and areas of interest to you.
- Learn what's new at Lotus, including product information, press releases, and world-wide events.
- Browse through purchasing information to help you buy Lotus products more easily.
- Go to the Lotus Customer Support home page.
- Learn more about Lotus educational services, such as educational course descriptions and schedules at Lotus Authorized Education Centers (LAEC), and certification options and exams descriptions for Certified Lotus Professional (CLP) programs.
- Learn how you can develop or market products or services based on Lotus technology as a Lotus Business Partner.
- Browse through job opportunities at Lotus.
- Go to the IBM software home page.

Lotus Customer Support home page

The Lotus Customer Support home page provides access to information about all Lotus world-wide suport services.

From the Lotus Customer Support home page you can do the following activities:

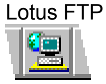
- Learn about all Lotus world-wide support services.
- Go to Product Support home pages for specific information about Lotus products and to ask technical questions of Lotus product support specialists.
- Browse through frequently asked questions in the Lotus Knowledge Base.
- Go to the Lotus Customer Support FTP site to receive Lotus product updates.

Lotus Customer Support FTP site

The Lotus Customer Support FTP site provides a list of products that you can upgrade.

{button ,AL(`H_CREATING_A_NEW_OLE_OBJECT_IN_NOTEPAD_STEPS;H_OVERVIEW_SHARING_INFORMATION_USING_OLE_IN_NOTEPAD_OVER;H_USING_LOTUS_INTERNET_SUPPORT_STEPS;',0)} See related topics

Selecting Internet Support

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

Using Lotus Internet Support

In Organizer, if you have a Web browser on your computer, you can go to Lotus home pages and FTP site.

1. Choose Help - Lotus Internet Support.
2. Choose the command for where to go on the Web.

Overview: Using TeamMail

TeamMail works with your current electronic mail system to send and receive mail messages from within Organizer. Using TeamMail you can:

- Send a message and distribute it to one or more users.
- Send selected entries as the text of your message.
- Save a distribution list and use it to quickly send messages to frequently-used names, addresses, and mailing lists.
- Specify that you receive notification when your message is delivered.

Selecting Send options in TeamMail

Option	Result
Message only	Sends a text-only message to one or more people.
Message with selected entries as message body.	Sends a message with selected entries as contents of message to one or more people.

Selecting To options in TeamMail

Option	Result
People I select from mail directory	Selects people from the mail directory.
People from selected addresses	Selects people from specified address entries.

Sending mail using TeamMail

1. Choose File - TeamMail

   Organizer displays the TeamMail dialog box.
2. Specify a Send option .
3. Specify a To option.
4. (Optional)   Check the Don't include address in message check box if you do not want address information in your message.
5. Click OK.
6. Enter your password and any other information that your e-mail system requires.
7. Click OK.

   TeamMail displays the TeamMail tabbed dialog box.

{button ,AL(`;H_OVERVIEW_USING_TEAMMAIL_OVER',0)} See related topics

Details: Printing in black and white

Keyboard shortcut
You can also press CTRL+P to select the black-and-white printing option.

{button ,AL(`H_PRINTING_IN_BLACK_AND_WHITE_ONLY_STEPS',1)} Go to procedure

Printing in black and white

By default, Organizer prints in color if you use a color printer; however, you can print in black and white only.

1. Choose File - Print.

2. Click Options.
3. Under Preferences, select Print in black & white.
4. Click OK.
5. Click OK to start printing.

{button ,AL(`H_PRINTING_IN_BLACK_AND_WHITE_ONLY_DETAILS',1)} See details

{button ,AL(`;H_CUSTOMIZING_LAYOUT_STYLES_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_INFORMATION_FOR_DIFFERENT_DATEBOOKS_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Printing in portrait or landscape orientation

Keyboard shortcut
You can also press CTRL+P to select the printing orientation.

{button ,AL(`H_PRINTING_IN_PORTRAIT_OR_LANDSCAPE_ORIENTATION_STEPS',1)} Go to procedure

Printing in portrait or landscape orientation

How your information is printed is determined by the orientation you select.

1. Choose File - Print.

2. Click Setup.
3. Select the Portrait or Landscape option.
4. Click OK.
5. Click OK to start printing.

{button ,AL(`H_PRINTING_IN_PORTRAIT_OR_LANDSCAPE_ORIENTATION_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting double-sided printing

Keyboard shortcut
You can also press CTRL+P to select double-sided printing.

{button ,AL(`H_SELECTING_DOUBLE_SIDED_PRINT_OPTIONS_STEPS',1)} <u>Go to procedure</u>

Selecting double-sided printing

You can print your Organizer information on one side of your paper (single sided), or both sides of your paper (double sided). The default is single sided.

1. Choose File - Print.

2. Select Double sided.
3. Click Options to select additional double-sided options.
4. Under Double sided, select an option.
5. Click OK.
6. Click OK to start printing.

{button ,AL(`H_SELECTING_DOUBLE_SIDED_PRINT_OPTIONS_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting printer setup options

Keyboard shortcut
You can also press CTRL+P to select printer setup options.

{button ,AL(`H_SELECTING_PRINTER_SETUP_OPTIONS_STEPS',1)} Go to procedure

Selecting printer setup options

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

1. Choose File - Print.

2. Click Setup.

   To display Help for an option in this dialog box, click the , in the top-right corner of the dialog box, then click the option. You can also refer to your printer documentation for more information on your printer.

See details

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

{button ,AL(`H_SELECTING_PRINTER_SETUP_OPTIONS_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Selecting the number of copies to print

By default, Organizer prints one copy of any section that you select for printing. You can print up to 99 copies of what you're printing in a single printing.

1. Choose File - Print.

2. For Copies, select the number of copies you want to print.
3. Click OK to start printing.

{button ,AL(`H_SELECTING_THE_NUMBER_OF_COPIES_TO_PRINT_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting the number of copies to print

Keyboard shortcut
You can also press CTRL+P to change the number of copies.

Selecting the number of copies
Click the + (plus) to increase or - (minus) to decrease the number of copies. You can also highlight the number in the Copies text box and then enter another number for the copies you want.

{button ,AL(`H_SELECTING_THE_NUMBER_OF_COPIES_YOU_WANT_TO_PRINT_STEPS',1)} Go to procedure

Details: Selecting what order to print your information in

Keyboard shortcut
You can also press CTRL+P to select the order in which to print your information.

{button ,AL(`H_SELECTING_WHAT_ORDER_TO_PRINT_YOUR_INFORMATION_IN_STEPS',1)} Go to procedure

Selecting what order to print your information in

Organizer prints section information first across and then down for paper types that include multiple rows and columns, such as labels. You can change the print order so that Organizer prints section information down, then across.

1. Choose File - Print.

2. Click Options.
3. Under Print order, select an option.
4. Click OK.
5. Click OK to start printing.

{button ,AL(`H_SELECTING_WHAT_ORDER_TO_PRINT_YOUR_INFORMATION_IN_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting whether to skip blank entries

Keyboard shortcut

You can also press CTRL+P to select whether or not to skip blank entries.

{button ,AL(`H_SELECTING_WHETHER_TO_SKIP_BLANK_PAGES_STEPS',1)} Go to procedure

Selecting whether to skip blank entries

By default, Organizer includes blank entries (or spaces or pages) where they exist in Organizer sections. You can change it so that Organizer doesn't print blank entries.

1. Choose File - Print.

2. Click Options.
3. Under Preferences, select Skip blank entries.
4. Click OK.
5. Click OK to start printing.

{button ,AL(`H_SELECTING_WHETHER_TO_SKIP_BLANK_PAGES_DETAILS',1)} See details

{button ,AL(`;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS;H_PRINTING_YOUR_SCHEDULE_STEPS;H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;H_TROUBLESHOOTING_PRINTING_OVER',0)} See related topics

Details: Selecting a printer

Selecting a printer in other ways
You can also choose File - Print and click Setup to select a printer.

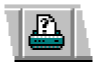
Selecting a specific printer
Organizer lists only installed printers. To add additional printers, you must install them in Windows.

{button ,AL(`H_SELECTING_A_PRINTER_STEPS',1)} Go to procedure

Selecting a printer

Organizer uses the default printer specified in the Printers folder in the Windows Control Panel unless you select another printer. The printer that you select determines which fonts are available when you print.

1. Choose File - User Setup - Printer Setup.



2. Under Printer, click the Name drop-down box and select a printer.

   See details

   Note The remaining options in this dialog box depend on the type of printer you've selected. Although the options include selecting a paper size and orientation, the paper size and orientation that you select in the Layouts dialog box take precedence over the settings in this dialog box.

3. Click OK.

Organizer uses the printer you select for the remainder of the current session.

{button ,AL(`H_SELECTING_A_PRINTER_DETAILS',1)} See details

{button ,AL(`H_SETTING_UP_YOUR_PRINTER_STEPS;H_SELECTING_PRINTING_OPTIONS_STEPS;H_PRINTING_ANY_ORGANIZER_SECTION_STEPS',0)} See related topics

Selecting options for double-sided printing

Option	Result
Full page	Prints on two sides of a regular (non-perforated) sheet of paper (default).
Perforated paper	Prints the pages sequentially on perforated paper.

Details: Selecting printing options

Printing in color or in black and white
By default, Organizer prints in color if you use a color printer. To print in black and white on a color printer, select Print in black & white.

Setting the print order
For paper types that include multiple rows and columns, such as labels, Organizer prints information across the first row, then across the next row, and so on. You can change the order so that information prints down the first column, then down the next column, and so on.

The Print order options are available only when both the selected layout and paper type have multiple rows and columns.

Specifying label options
You can print up to 1,000 copies of each label in a single printing. For example, if you need 25 labels for the same address, you would select the address, select a label layout, then specify 25 copies to print. You can enter a specific number or click + (plus) to increase or - (minus) to decrease the number of labels to print.

If you are printing labels in a multiple row or column format, you can also enter a number that corresponds to the position of the first label on the first page. This is particularly useful if you have a partially used label sheet. Rather than waste the partial sheet, specify the position of the first remaining label as the location at which to begin printing.

Tip Make sure to check the selected Print order when you're counting the "used" labels to determine the position of the first remaining label; that is, count either across then down or down then across.

The Labels options are available only for label paper types.

Specifying double-sided printing
The Double side printing options are available only if you selected Double sided in the Print dialog box.

{button ,AL(`H_SELECTING_PRINTING_OPTIONS_STEPS',1)} Go to procedure

Selecting printing options

1. Choose File - Print.

2. Click Options.
3. Select the Preferences you want.

   See details
4. Under Print order, select the order in which you want Organizer to print pages with multiple columns or rows.

   See details
5. Under Labels, enter the number of times to print each label and a starting label number.

   See details
6. Under Double-Sided, select whether you want Organizer to print double-sided information for regular paper or perforated paper.

   See details
7. Click OK.

{button ,AL(`H_SELECTING_PRINTING_OPTIONS_DETAILS',1)} See details

{button ,AL(`H_SELECTING_A_PRINTER_STEPS;H_SETTING_UP_YOUR_PRINTER_STEPS;',0)} See related topics

Selecting printing preferences

Option	Result
Skip blank entries	Prints (default) or doesn't print entries and pages that don't contain information.
Print in black & white	Prints in color (default) or prints in black and white only.

Selecting the print order

Option	Result
Across then down	Prints information in multiple rows or columns from left to right, and then from top to bottom (default).
Down then across	Prints information in multiple rows or columns from top to bottom, and then from left to right.

Selecting a single entry

1. Go to the entry you want to select.
2. Click the entry to select it.

{button ,AL(`H_COPYING_SINGLE_ENTRIES_STEPS;H_MOVING_SINGLE_ENTRIES_STEPS',0)} See related topics

Details: Selecting multiple entries

Keyboard shortcuts

To select multiple entries that are in sequence, select the first entry, then press and hold SHIFT while you press , ↓, →, or ←.

{button ,AL(`H_SELECTING_MULTIPLE_ENTRIES_STEPS',1)} Go to procedure

Selecting multiple entries

You can select multiple entries that are and aren't in sequence.

1. Go to the first of the multiple entries you want to select.
2. Select the entry.

- If the multiple entries you're selecting are in sequence: move to the last entry, press and hold SHIFT, and click the last entry.
- If the multiple entries you're selecting are not in sequence: move to each entry, press and hold CTRL, and click the entry.

Note When you have selected your multiple entries, you can perform the same operation with them as you can with selected single entries, such as deleting, reordering, and so on.

{button ,AL(`H_SELECTING_MULTIPLE_ENTRIES_DETAILS',1)} See details

{button ,AL(`H_COPYING_MULTIPLE_ENTRIES_STEPS;H_MOVING_MULTIPLE_ENTRIES_STEPS',0)} See related topics

Selecting view and print options for merged Address records

Option	Result
View on-screen before printing	Displays the merged document so that it can be reviewed prior to printing.
Send directly to the printer	Sends the merged document to the printer without first displaying it.

Details: Merging Address records with Word Pro

Switching between Organizer and other Windows applications
To switch between Organizer and any open Windows application, press ALT+TAB.

Using the Section field
If you created more than one Address section in your Organizer file, use the Section field in the Merge Assistant dialog box to specify the name of the Address section you want to use when you merge information.

Inserting merge fields
When you insert merge fields, you must specify where -- within your merge document -- you want Address record information to appear, for example, name, address, city, and so on.

If your Word Pro document already contains fields from another merge, you may need to take out those fields before you can proceed with the Organizer information merge. This is necessary if the field names contained in the Word Pro document aren't the same as the field names in Organizer.

Using Limit to Selected Records
You can include or exclude specific Organizer Address records in the merge document by specifying conditions on particular fields or by specifying particular records.

Note For information about performing specific Word Pro merge steps, refer to the Word Pro Help or printed documentation.

{button ,AL(`H_USING_MAIL_MERGE_WITH_AMI_PRO_3.0_STEPS',1)} Go to procedure

Merging Address records with Word Pro

You can merge Organizer Address records with a Word Pro document (such as a letter). Before you merge information, create the Merge document in Word Pro 96 for Windows 3.1 or Word Pro for Windows 95. Make sure that both Word Pro and Organizer are active at the same time.

1. Open the Organizer file containing the information you want to merge.
2. Switch to Word Pro, and open the document you want to merge the Organizer file information with.

   See details
3. Choose Edit - Script & Macros - Run.
4. Click Browse.
5. For File name, enter ORGMERGE.LWP and click Open.

   If ORGMERGE.LWP doesn't appear in the C:\Wordpro\Scripts subdirectory, go to the C:\Lotus\Organize directory for the file, or the directory (or subdirectory) where you installed Organizer, to get the file.
6. Click OK in the Run Script dialog box.

   The Lotus Organizer Merge Assistant dialog box appears.
7. For Section, enter the name of the Address section in which the information you want to merge appears.

   See details
8. Click OK.

   There is a short wait while your information is converted.
9. Under Document in which to merge data, select the Use the current document option.
10. Click Insert Merge Fields.
11. To insert fields in the document, select an Organizer field from the list that appears in the center.

    See details
12. Position the cursor in the document where you want the field information to appear and click Insert Field.

    The Address field appears in your Word Pro document.
13. Repeat steps 10 and 11 for each field you want to merge.
14. When you finish inserting merge fields, click Done.
15. From the Merge Assistant dialog box, click the Step 3: View and Print tab to select how to view your results.
16. (Optional) Click Limit to Selected Records and select the field conditions or particular records you want to be used in the Word Pro merge document.

    See details
17. Select the appropriate option.
18. (Optional) Click Print Options for Results and select how you want your printed Word Pro document(s) to appear.
19. Click Done.

    The Organizer Address information appears in your Word Pro document.

Note When you merge information, multiple copies of the same document are printed. The copies are identical except for a few special fields that contain the specific names and addresses of the recipients.

{button ,AL(`H_USING_MAIL_MERGE_WITH_AMI_PRO_3.0_DETAILS',1)} See details

{button ,AL(`H_CREATING_A_FILTER_STEPS;H_FILTERING_SELECTED_NAMES_AND_ADDRESSES_STEPS;H_APPLYING_A_FILTER_STEPS;',0)} See related topics

Troubleshooting files

The following are troubleshooting tips about files.

File sharing

My assistant tried to open my file to make an appointment for me, and couldn't open the file. Why would this happen?

Your assistant can open your file and make an appointment for you. But first, if you assigned an Assistant access for your assistant, you must give your assistant the password to access the file.

To do this, assign a password level of access you want to give your assistant and save the file with the password. If you assigned the Owner access to the file, you must assign an access for the assistant (Assistant access or Reader access) so the assistant can open the file. Then, you must give your assistant the Assistant password. When your assistant opens your file and enters the Assistant password, your assistant can read or write changes to the file. For example, your assistant can create appointments for you, set up Planner events for you, and so on.

File merge

I changed my password while I was working on a file and disconnected from the network. When I merged the local file back into my network file, I lost my new password. What happened to my new password?

You can merge edits, additions, and changes to entries into an original network file. You cannot, however, create or edit passwords, change preferences, or change the information on the front page of your Organizer notebook. You can change the password to your original network file when you are connected to the network again. For more information about merging files, see Merging files.

Passwords

My password doesn't work. I know I entered the correct password. Why won't Organizer accept my password?

Organizer passwords are case-sensitive. If you enter the correct password with the wrong case-sensitivity, your password won't work. For example, if your password is Augusta and you type augusta, Organizer can't recognize what you've entered as the correct password.

Troubleshooting printing

The following are troubleshooting tips about printing.

In my Calendar section, I have show-through entries from other sections. Can I print these show-through entries when I print the Calendar information?

When printing the Calendar section you can select one of the following layouts to print both appointments and show-through entries.

- The Monthly Calendar layout prints a month.
- The Daily Page layout prints a day per page.
- The Weekly 2-Page layout prints an entire week on two pages.

I want to print a weekly view of my appointments, but I don't see that print option. What should I use?

Use the Weekly 2-Page, Weekly Timeline, or Weekly Work Timeline layout. These layouts print the week and show what time is booked and what time is available for the week.

When I print a home Address record, only the name prints. The rest of the Address record doesn't print. What can I do to fix this?

You need to change the Preference option that tells Organizer to print only the first line of each entry. See Customizing layouts.

Troubleshooting tips for Organizer sections

The following troubleshooting tips are about how to manage your information and how to perform tasks in all Organizer sections.

Anniversary

Can I set up a repeating anniversary for something that doesn't occur on the same day every year, such as a birthday that occurs on Leap Year?
Yes. See Details: Creating an Anniversary for that information.

Calendar

I manage my boss's calendar. Is there a way to look at my boss's Calendar section and my Calendar section without having to open two files?
Yes, you can include your boss's Calendar section in your Organizer file. See Including sections from other Organizer files.

Calls

In Calls, I tried to create an entry by selecting the name I wanted from the Last name drop-down box in the Create Call dialog box. The name I wanted wasn't in the list. I know I entered it. Why doesn't it appear in my list?
Organizer displays information in the Last name drop-down box from the first Address section in your Organizer book. If you created multiple Address sections in your notebook, Organizer goes to the first Address section that appears in your notebook.

General questions

I tried to import an ASCII text file into my Organizer Address section. When I went to map the fields, only one field was listed as an option. I know my file had many fields. Why did this happen and what can I do?
Your ASCII text file contains a blank line at the top of the file, or you're trying to import a fixed-length ASCII text file.

If your file contains a blank line at the top, open the file in a text editor, such as Windows Notepad or the DOS Editor, and remove the blank line from the top of the file.

If your file has a fixed length, convert it to Delimited ASCII file format to import it to Organizer.

I set up my modem under Windows 95, but I can't make a telephone call from Organizer. What can I do?
If you can't make telephone calls from Organizer, and your modem is already set up, you can verify that the dialing properties for the location you're dialing from, and the configuration of the modem you're using, are set up correctly. To check the dialing properties and the configuration of your modem, see Selecting a dialing from location and configuring your modem. Have your modem documentation nearby while you check these settings.

You can verify the COM port settings in the Windows 95 Control Panel. Go to the Windows 95 taskbar, click Start and choose Settings and then choose Control Panel. Double-click the Modem icon. Click the Diagnostics tab and check the COM port settings for your modem. Under Modems, you can also verify the dialing properties and modem configuration in the Windows 95 Control Panel.

Who can I call to order printed documentation for Organizer 97?
Call Lotus Customer Service and Information. In the U.S., call (800) 343-5414; in Canada, call (800) GO-LOTUS (800) 465-6887.

Details: Undoing your last action

Keyboard shortcuts
You can also press CTRL+Z to undo your last action.

Caution You can't undo the deletion of included sections, repeating appointments, categories, cost codes, or customer codes.

{button ,AL(`H_UNDOING_YOUR_LAST_ACTION_STEPS',1)} Go to procedure

Undoing your last action

Many actions in Organizer can be undone. The Undo feature affects only the last action you performed.

To undo your last action, choose Edit - Undo.

Note When the Undo command is dimmed, you cannot undo your last action.

{button ,AL(`H_UNDOING_YOUR_LAST_ACTION_DETAILS',1)} See details

Details: Using Clean Screeen

Keyboard Shortcuts
You can clear or redisplay windows controls by pressing F11.   You can also press ALT+V and deselect Show Clean Screen to redisplay the Windows controls.

With a clean screen, you can continue to work in any Organizer section using both the mouse and keyboard. For example, you can access the File commands on the menu by pressing ALT+F.

Clearing the screen in other ways
You can also clear or redisplay windows controls by pressing the right mouse button and selecting or deselecting Show Clean Screen.

{button ,AL(`H_USING_CLEAN_SCREEN_STEPS',1)} Go to procedure

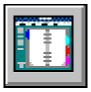
Using Clean Screen

Clean Screen gives you a quick way to maximize your Organizer desktop by hiding the Windows controls from the screen. When you use Clean Screen, Organizer removes the title bar, menu, SmartIcons, and vertical and horizontal scroll bars so that you have the whole screen in which to view and edit your Organizer desktop.

1. Choose View - Show Clean Screen.

   See details

   The clean screen icon appears in the center of the screen.



2. Click this icon to redisplay the Windows controls.
3. (Optional) You can drag the icon to change its location on the screen.

{button ,AL(`H_USING_CLEAN_SCREEN_DETAILS',1)} See details

Page dialog box

Use the Page dialog box to set style attributes for Notepad pages.

Linking Notepad pages

Folding Notepad pages

Assigning color to Notepad pages

Customize dialog box

Use the Customize dialog box to customize sections, for example, to add, remove, or rename sections, include sections from other Organizer files, to change the color and texture of the binder, change the name and appearance of section tabs, place pictures on section-tab pages, change the font size, and open to specific sections in Organizer.

Adding a section

Removing a section

Including sections from other Organizer files

Changing the appearance of your binder

Changing the order of sections

Changing the name of a section

Changing the size or width of section tabs

Changing the color of a section tab

Placing a picture on a section-tab page

Changing the font size for all Organizer sections

Opening your binder to a section

Organizer Preferences dialog box

Use the Organizer Preferences dialog box to set up Organizer preferences that will be in effect each time you start Organizer.

Selecting an Organizer file to open automatically

Changing Organizer display preferences

Changing mouse pointer preferences

Changing alarm preferences

Changing sound preferences

Changing the Organizer paths

Changing automatic save and backup preferences

Categories dialog box

Use the Categories dialog box to create, rename, or delete categories.

Overview: Categories

Creating a new category

Assigning a category to an entry

Renaming a category

Deleting a category

Displaying categories with entries

Displaying entries in a particular category

Cost Codes dialog box

Use the Cost Codes dialog box to create, rename, or delete cost codes.

Overview: Creating a cost code

Creating a customer and cost code

Assigning a customer and cost code to an entry

Renaming a customer and cost code

Displaying customer and cost codes with entries

Deleting a customer and cost code for an entry

Filters dialog box

Use the Filters dialog box to create, edit, copy, apply, clear, or delete filters.

Overview: Filters

Creating a filter

Editing a filter

Copying a filter

Applying a filter

Clearing a filter

Removing a filter

SmartIcons Setup dialog box

Use the SmartIcons Setup dialog box to customize a set of SmartIcons and to edit individual icons.

Adding an icon to the default set of SmartIcons
Changing the set of SmartIcons you want to display
Editing an existing icon
Changing the size of an icon
Creating a set of SmartIcons
Deleting a set of SmartIcons
Attaching a script to an icon