

Overview Guide

Lotus®

Organizer⁹⁷ EDITION

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Introducing Lotus Organizer 97

The Best Time Management Software for Today's Connected World.

Time management is unquestionably a critical component of productivity in today's competitive business world. Busy users need a time management system that is full-featured, and friendly enough to encourage daily use. They require a system that is completely intuitive, as spending time training personnel on how to use a time management system would be counter-productive. Lotus Organizer™ has always met these requirements, and delivers again with Lotus Organizer 97.

Lotus Organizer is the leading time management software for Windows, with more than 10 million people worldwide depending on it to help them stay on top of business. Organizer 97 is a new release of this award-winning product designed to complement new ways of working in today's connected world, through unmatched Internet integration and a range of new group collaboration tools. Organizer 97 is a full 32-bit application, supporting Windows 95 and Windows NT. And, as with earlier versions, Organizer 97 is fast to learn and fun to use. New users immediately understand its intuitive notebook metaphor, complete with tabbed sections and pages that turn.

Organizer 97 seamlessly integrates seven keys to successful time management: Calendar, To Do List, Address Book, Call Manager, Planner, Notepad and Anniversary Reminder, to give time-starved business users everything they need to plan their days efficiently and be more productive. Each Organizer section is designed to help users maximize their time and stay on top of constantly shifting tasks, deadlines, contact information, as well as important events and dates.

Organizer 97 is packed with intelligent features in five key areas:

- ✧ **Productivity:** To meet users' top requirement for software that simply help them get the job done fast, Organizer offers a complete set of easy-to-use, powerful tools that help with all of their time management tasks.
- ✧ **Internet/Intranet:** Today's users are looking for new and better ways to access and integrate Internet and intranet information with their desktop software. Organizer 97 gives users a complete set of tools for exploiting the Internet directly from within the product.
- ✧ **Collaboration:** Because teamwork is so integral to working efficiently in business today, Organizer provides sharing capabilities that enhance group collaboration and eliminate duplication of effort.
- ✧ **Information Access:** Organizer meets users' requirements for access to information from a wide variety of sources and formats. It delivers fast, seamless connections to information residing in PC applications, corporate databases, or even the Internet and intranets.
- ✧ **Customization:** Organizer gives users the flexibility to easily create a time management system that maps to their preferences, because one size does not fit all.

This overview guide provides more detail on the highlights of Organizer 97 within each of these areas.

Lotus Organizer 97 Highlights

Productivity

The Seven Keys to Successful Time Management

- ❖ **Calendar:** Manage your day by entering appointments; displaying your calendar in day, week, two-week, or month views; creating “pencil in” tentative commitments; setting reminder alarms and messages; and rescheduling and canceling appointments using drag and drop.
- ❖ **To Do List:** Manage tasks by setting priority levels and alarms; assigning categories; sorting tasks by priority, status, date, or category; and checking off completed tasks. Overdue entries are automatically carried forward.
- ❖ **Address Book:** Keep track of contact and personal information by entering address information, categorizing by many criteria, performing searches, and attaching notes.
- ❖ **Call Manager:** Track contacts by automatically logging incoming and outgoing calls, displaying call records over multiple criteria, logging call information, retrieving information from the Address section, and creating follow-up call records.
- ❖ **Planner:** Manage your events and long-term schedules by defining up to 15 different events, booking overlapping events of varying duration, blocking off event time from your Calendar, and displaying quarterly or yearly views.
- ❖ **Notepad:** Manage freeform notes, graphics, and/or charts by entering them in the Notepad section; categorizing entries and sorting pages; creating a table of contents automatically whenever you make an entry; and navigating to a specific page from the table of contents.
- ❖ **Anniversary Reminder:** Manage important events such as birthdays and anniversaries by setting reminder alarms; displaying recurring events by year, month, category, or zodiac sign; and including variable (some holidays) as well as fixed dates. Use Organizer’s event icons for a quick visual look at coming events.

Ease of Use and Performance Features

- ❖ **Merge Capabilities:** Merge your local Organizer file with your Organizer file on the LAN.
- ❖ **Show Through Capabilities:** View To Do, Planner, Calls and Anniversary entries in your Calendar.
- ❖ **International Address Support:** Choose from 26 different “culture-friendly” envelope and label printing formats.
- ❖ **Filtering:** View only the information you need in any of the seven sections, by performing searches and sorts based on multiple criteria.
- ❖ **TAPI Support:** Set up Telephony API preferences in Windows 95 for dialing within Lotus Organizer.
- ❖ **On-Line Tour:** Get up to speed on Lotus Organizer in a quick and simple manner, and discover new features and functionality.

- ✧ **Print Layouts:** Choose from over two dozen print layouts, including monthly calendars and trifolds. Print on standard or customized paper sizes, and in formats to fit Avery, DayRunner, Day-Timer, Deluxe, Filofax, and Franklin Day Planner pages.
- ✧ **Archiving and Compacting:** Easily delete old entries and compress your files to save disk space.
- ✧ **Working Together with Windows 95:** Enjoy full exploitation of Windows 95, including the use of long file names, tabbed dialog boxes, and multi-threading.
- ✧ **Working Together with SmartSuite® 97:** Perform cross-application tasks with ease; SmartSuite applications work together as one.
- ✧ **Backward Integration:** Automatically convert Lotus Organizer 1.0, 1.1, 2.0, and 2.1 files.

The Internet

- ✧ **View and Edit via the Web:** View and change your appointments and tasks, from wherever you are. With Organizer 97's new Web Calendar feature you can keep your calendar, or your team's calendar, up-to-date using a Web browser.
- ✧ **Easy Web Access and Storage:** Embed links to Web pages and URLs in the Notepad section. Link these to other sections in Organizer. For example: Link a meeting in your Calendar section with a Web page link you've embedded in the Notepad section as a reminder to discuss the page during the meeting. You'll have quick access to the page, without having to retype the URL or remember where you've stored it.
- ✧ **Quick Access to Lotus Pages:** Use Internet SmartIcons® to quickly access Lotus Customer Support, FTP site and Home Page. You'll have the latest Lotus news and support information right at your fingertips.

Collaboration

- ✧ **Section Sharing:** Share Organizer sections with other members of your workgroup to eliminate duplication of effort and boost productivity. Create special team sections, like team to do lists, team Address books, and team calendars to keep everyone on track. Then, store them on the network so that anyone with the proper access can edit or view them. Organizer files can be shared and edited simultaneously; files are saved after each revision. Or, set up access to your Organizer file for an Assistant. Users with Assistant access can schedule your appointments, while entries you've marked as confidential cannot be viewed or changed.
- ✧ **TeamMail:** Send and receive electronic mail via cc:Mail™, Lotus Notes®, or other VIM- or MAPI-compliant e-mail system directly from within Organizer. Use the option to send selected Organizer entries as the text of your message to avoid retyping existing data.
- ✧ **Security:** Control access to your Lotus Organizer files with up to three levels of security.

Information Access

- ❖ **Linking Capabilities:** Link information across sections with point-and-click ease and move instantly among linked entries. For example: Link a meeting in your Calendar section with an agenda in the Notepad section, and switch between these two items with a single mouse click.
- ❖ **File Format Support:** Quickly integrate Organizer with information in other files through import/export capabilities using .TXT and .DBF formats.
- ❖ **OLE 2 Support:** Link and embed objects from spreadsheets, databases, word processors, and other applications in your Notepad section, and edit them from within Organizer. Any changes made in the source application made within Organizer will be reflected within Organizer.
- ❖ **Easily Add New Entries:** Add new entries to any section, directly from the section you're currently working in.
- ❖ **Addressing Capabilities:** Mail merge with Word Pro® to quickly and easily address form letters with addresses stored in Organizer. Or, easily copy address information to another word processor.

Customization

- ❖ **Personalized Datebook:** Add, rename, and reorder sections. Change tab colors and personalize covers to give Organizer the look you prefer.
- ❖ **View Selections:** View information in the format you prefer. Sort Address entries by individual name, company name, category, or zip code. Change from one view selection to the next with one click.

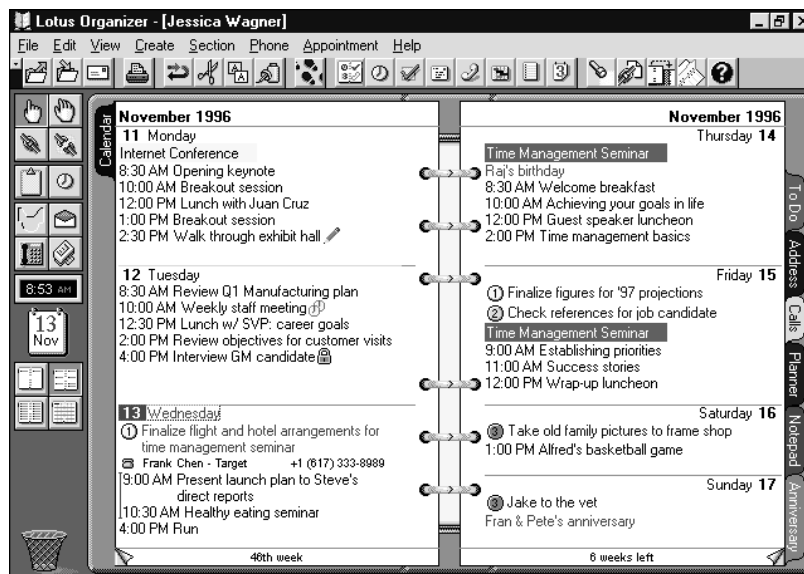
Productivity: Getting Work Done Quickly and Easily

Whatever the task, users' number one requirement is for easy-to-use tools that help them get the job done fast. When it comes to time management tools, Organizer offers a complete set of such tools that help users manage their time efficiently. For everything from scheduling meetings and appointments; to creating to do lists; to tracking contact information, phone calls, and important dates and events; to typing, storing, and retrieving notes, Organizer helps keep users on top of day-to-day business.

Seven Time Management Keys

Calendar

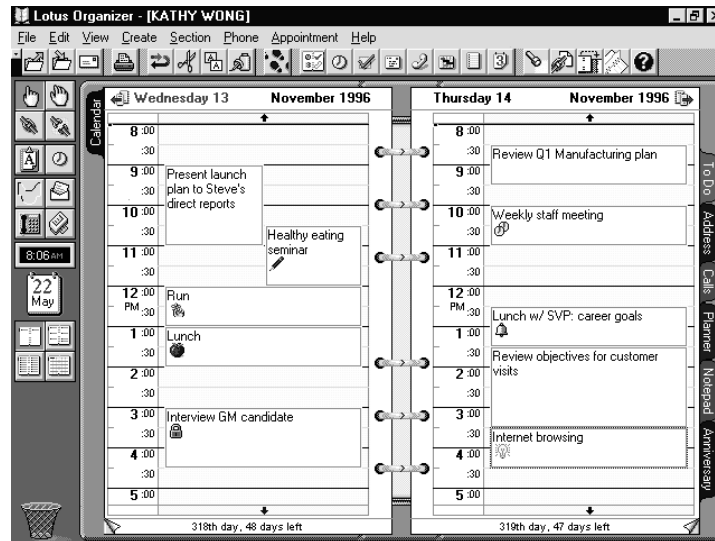
Organizer 97's Calendar gives users all the easy-to-use tools they need to manage their day. With Calendar, users can:



Manage your day in the Calendar with easy-to-use tools and useful viewing options.

- ❖ Display their calendar in day, week, two-week, or month views.
- ❖ Book overlapping appointments.
- ❖ "Pencil in" tentative commitments.
- ❖ Set recurring appointments by day, week, month, year, or variable dates.
- ❖ Share calendars with other members of their workgroup or team.
- ❖ Include other users' calendars in their own Organizer files.
- ❖ Display To Do, Planner, Calls, and Anniversary entries in their own calendar.

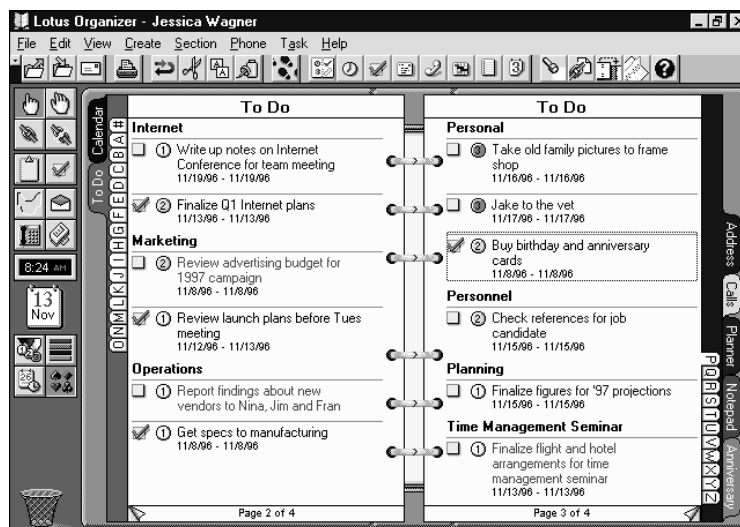
- ❖ Automatically merge calendar changes made on the road with the calendar back at the office.
- ❖ Set alarms and display messages to provide reminders of meetings or to run an application at a preset time.
- ❖ Reschedule and cancel appointments using drag and drop.
- ❖ Take advantage of Organizer's new Daily View for graphical displays of daily appointments in block format to get an immediate grasp of schedules and overlapping appointments.



For a quick look at how your day's shaping up — and eliminate any schedule conflicts — use Organizer's new daily view.

To Do

Organizer's To Do section provides users with all the tools they need to manage tasks efficiently, with plenty of automation to take the hassle out of staying on top of outstanding tasks and issues. To Do is where users:

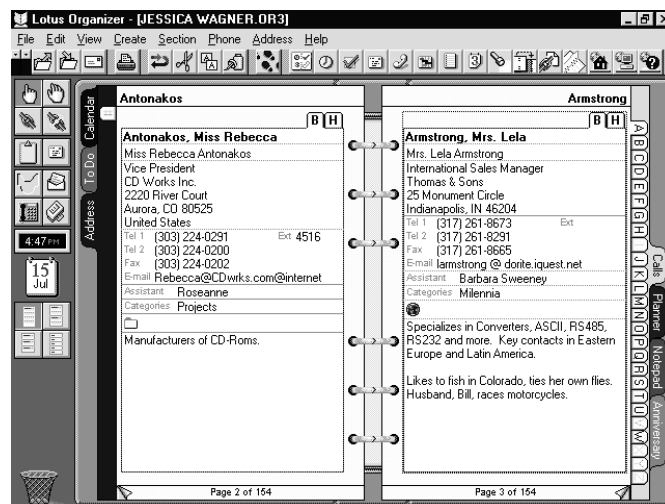


Stay on top of outstanding projects and issues in Organizer's automated, color-coded To Do section

- ❖ Set priority levels on tasks.
- ❖ See color-coded status for current, future, or overdue tasks.
- ❖ Set alarms on tasks.
- ❖ Assign categories to group tasks by project, person, or other criterion.
- ❖ Sort tasks by priority, status, date, or category.
- ❖ List recurring tasks.
- ❖ Check off completed tasks, specify a completion date, and optionally display completed tasks.
- ❖ Automatically carry forward overdue entries.

Address

The Address section gives users a host of easy-to-use options for managing contact and personal information. It also lets users quickly execute mail merges with Word Pro and other word processors. With Address, users can:

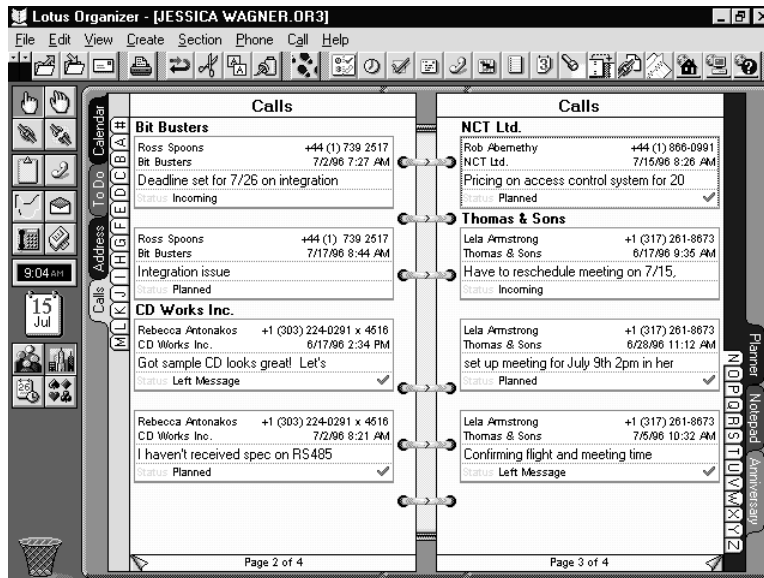


Simply keep track of all your business and personal contacts, or use powerful filtering capabilities to create targeted lists and mailings.

- ❖ Enter both business and home addresses for each person.
- ❖ View records in any of four formats.
- ❖ Categorize and sort by name, company, category, or zip code.
- ❖ Enter e-mail addresses, multiple telephone numbers, and more.
- ❖ Attach notes to any contact name.
- ❖ Import/Export information from database formats, including .TXT and .DBF.
- ❖ Merge address information easily into Lotus Word Pro.
- ❖ Cut and paste address information to other word processors.
- ❖ Filter the Address book on specific criteria.
- ❖ Customize field names.

Calls

Organizer's Calls section provides a powerful way for users to easily manage their phone contacts. It lets users:

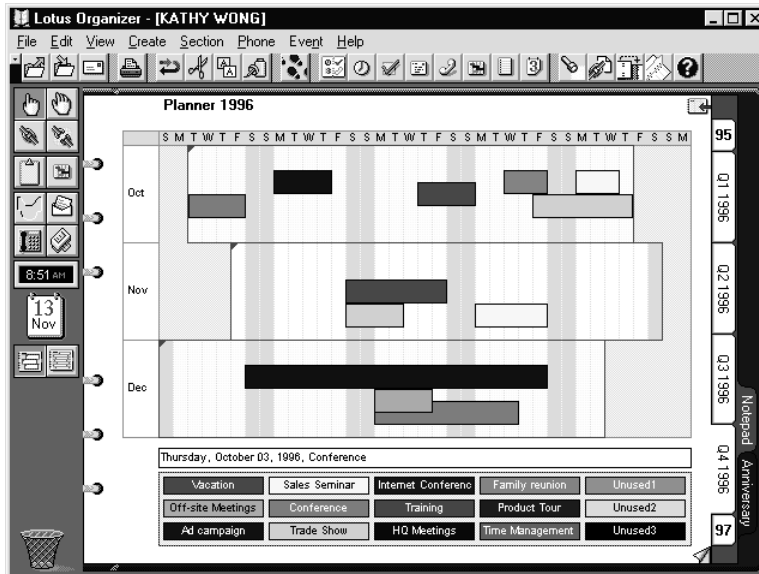


Manage all of your phone contacts easily. Organizer automatically tracks calls, dials, and keeps track of any unmade calls.

- ❖ Manage contacts by tracking incoming and outgoing calls.
- ❖ Display call records by individual status, company, date, or category.
- ❖ Log call date, time, duration, company, number, and notes in tabbed notes dialog boxes.
- ❖ Access name and company information from the Address section when entering calls.
- ❖ Create follow-up call records.
- ❖ Automatically carry forward uncompleted calls.
- ❖ Dial and re-dial numbers automatically via modem. Organizer now includes TAPI support, allowing telephony API preference set up in Windows 95.

Planner

Users can take advantage of Organizer's Planner to track events and do their long-term scheduling. Planner lets users:

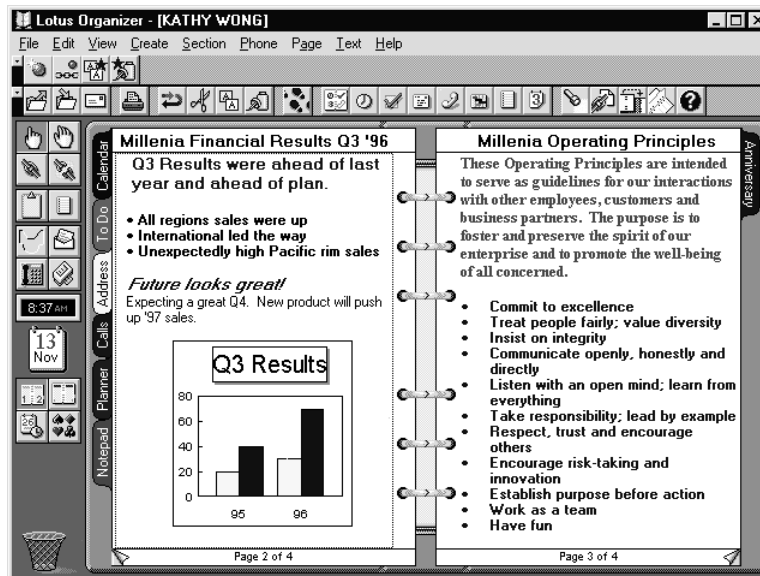


Do all of your long-term planning with drag and drop ease.

- ❖ Book overlapping events of varying duration.
- ❖ Change event duration and move events with drag and drop.
- ❖ Display quarterly or yearly views.
- ❖ Define up to 15 different events.
- ❖ Display 12-month charts to the year 2100.

Notepad

In Organizer's Notepad section, users manage their freeform notes, graphics, and charts, as well as links to favorite Web sites. Powerful, easy-to-use functionality lets users quickly:

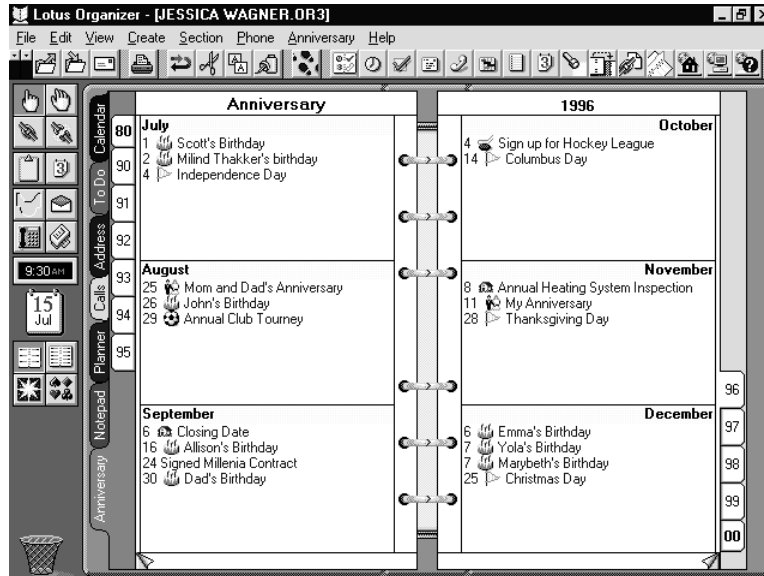


Take advantage of the Notepad's maximum flexibility for everything from writing yourself a quick note to setting up a live link to an important Web site.

- ❖ Type freeform notes; import numbers, text, and graphics files; and display bitmap, metafile, and text pages.
- ❖ Categorize entries and sort pages by number, creation date, category, or title.
- ❖ Link to files and work on them right in Notepad.
- ❖ Use multiple type fonts, colors, and sizes, as well as bold, italics, and underlining.
- ❖ Store graphs and charts on fold-out pages.
- ❖ Create a table of contents whenever an entry is made.
- ❖ Navigate to a specific page from the table of contents.
- ❖ Customize page numbering and table of contents display.
- ❖ Print pages, chapters, or the entire Notepad.
- ❖ Take advantage of OLE for live linking to important information within or outside of Organizer.

Anniversary

The Anniversary section provides a convenient place for users to centrally store and track important dates and events throughout the year — as well as automatic reminders. With Anniversary, users can easily:



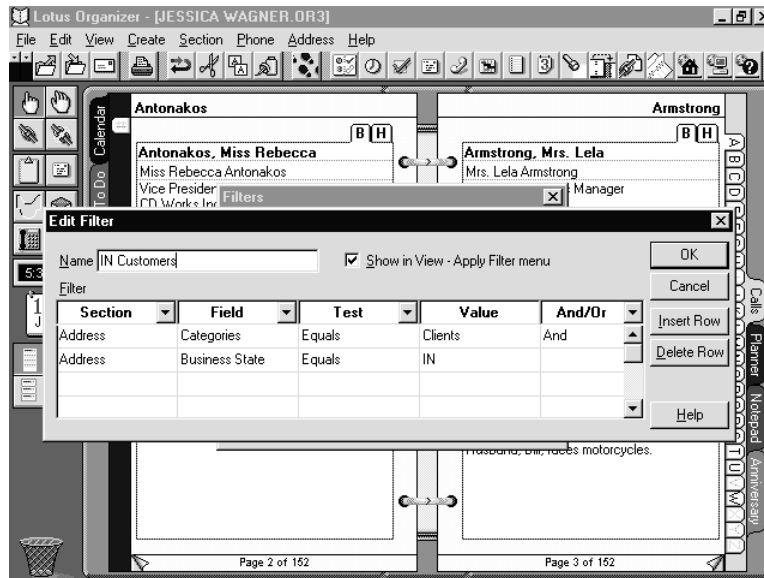
With Anniversary, you won't have to worry about forgetting birthdays or other important dates.

- ❖ Keep track of important dates and events, and let Organizer provide reminders as they approach.
- ❖ Mark birthdays, anniversaries, holidays, and other important events, and set alarms as reminders.
- ❖ Display recurring events by year, month, category, or even zodiac sign.
- ❖ Include variable dates (applicable to certain holidays), as well as fixed dates.

Productivity Innovations

Filtering

Organizer's filtering technology lets users display a subset of any entry based on specified criteria, to help them create well-defined or targeted lists for mailing or other purposes. Filtering delivers a more accurate, faster alternative to manual record sorting.



Hone in on just the right customers, prospects, or other contacts using Organizer's powerful, flexible filtering technology.

- ✧ Users can base their filtering criteria on text, numbers, dates, Organizer attributes (such as category or cost code), or any combination of these. For example, to prepare a mailing exclusively to business contacts in Indiana, the user would set criteria to display only records showing Indiana as the state and clients as the category.

Printing

A wide range of printing options in Organizer 97 streamlines the printing process and makes it easy to keep electronic and hard copy schedules and information in synch.

- ✧ Users can choose from over two dozen print layouts, including monthly calendars and tri-folds.
- ✧ Organizer lets users print on standard or custom paper sizes, and in formats to fit Avery, DayRunner, Day-Timers, Deluxe, Filofax, and Franklin Day Planner pages.
- ✧ Users have the option to include header and footer information, and print on both sides of a sheet.

International Address Support

Organizer 97 supports up to 26 international address formats, making it easy for users to customize envelopes and labels to conform with international styles and requirements. This eliminates the need to manually reformat addresses, and ensures the speed and accuracy of mailings.

Archiving and Compacting

For storing files that are no longer needed frequently, or when disk space is an issue, Organizer makes it easy to archive and compress files.

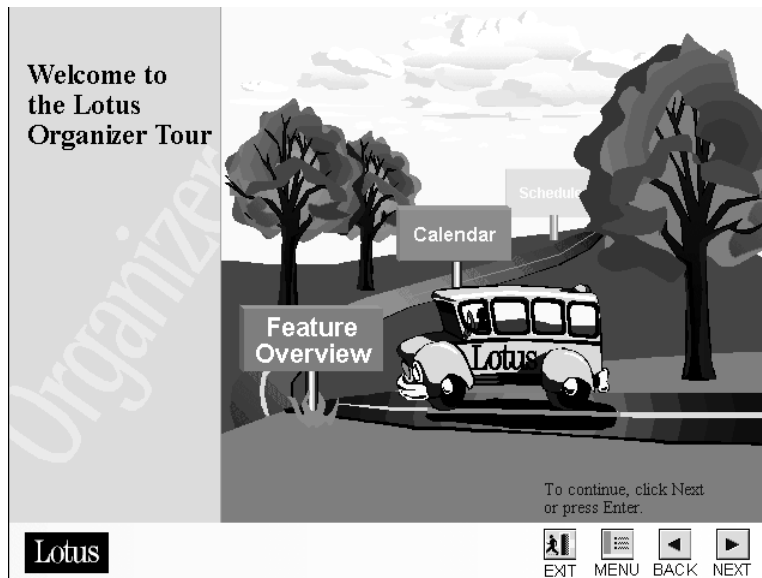
- ✧ Users can quickly archive information from any section by date.
- ✧ An easy-to-use compacting feature helps users maximize disk space.

User Assistance

On-Line Tour

With the visual, interactive guidance of Organizer's On-Line Tour, users get up to speed quickly on all features and functionality that lead to improved time management and increased productivity. The On-Line Tour is a fun-to-use, animated guide that includes:

- ✧ A four-minute Feature Overview.
- ✧ A five-minute guide on Calendar and To Do sections.
- ✧ A four-minute tutorial on Address and Call sections.
- ✧ A four-minute review on Anniversary, Planner, and Notepad sections.



Get up to speed quickly on all of Organizer's powerful, easy-to-use functionality.

Integration

Working Together with Windows 95 and Windows NT

Designed specifically for these advanced operating systems, Organizer 97 lets users take full advantage of the power of Windows 95 and Windows NT. Organizer now offers:

- ✧ Support for long file names
- ✧ Tabbed dialog boxes
- ✧ OLE 2.0
- ✧ Multithreading
- ✧ 32-bit processing
- ✧ And more.

Working Together with Lotus SmartSuite

Organizer 97 is just one component of Lotus' tightly-integrated suite of desktop productivity applications. Lotus SmartSuite® 97 delivers an up-to-date, complete set of 32-bit applications, including the new 1-2-3® 97, Organizer 97 and ScreenCam® 97, plus updated versions of Freelance Graphics®, Word Pro, and Approach®. These six powerful applications — together with SmartCenter™, the suite's command center — not only share the same user interface, they have been designed to work seamlessly with one another to help users complete cross-application tasks easily and quickly. For example,

- ✧ SmartCenter's SmartIcons make it easy for users to launch directly from Organizer (or any other SmartSuite application) to the next.
- ✧ The OrgMerge feature in Word Pro lets users efficiently merge Organizer addresses with Word Pro documents.

Backward Integration

Seamless integration with earlier versions of Organizer means upgrading to Organizer 97 and sharing files with users of previous versions is frustration-free.

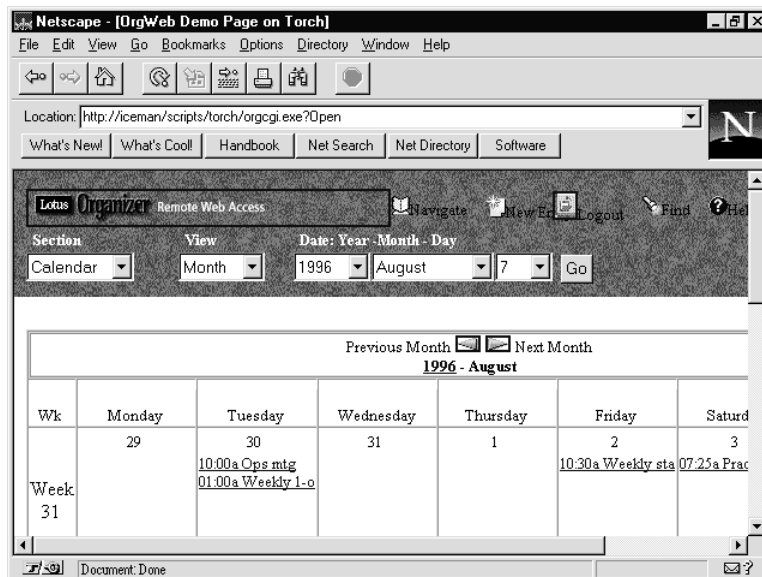
- ✧ Organizer 97 automatically converts Lotus Organizer 1.0, 1.1, 2.0, and 2.1 files.

The Internet/Intranet at Work

Explosive growth in Internet and intranet usage has users communicating and sharing information with others within and outside of their organizations in ways never before possible. For these users who increasingly want — and need — to use the Internet and company intranets together with their time management system, Organizer 97 offers a host of easy-to-use — and built-in — tools to access and share information via the Internet.

Organizer Web Calendar

The Organizer Web Calendar is a unique tool that lets users working remotely stay up-to-date on tasks and schedules, via the Web. Web Calendar lets users view and edit appointments and tasks in their own and their group's calendar from any computer, using Netscape Navigator or Microsoft Internet Explorer. Users can directly access their Organizer 97 .OR3 file stored on a file server, thus eliminating the need to copy files locally and then replicate once they're back in the office. With Web Calendar users can seamlessly:

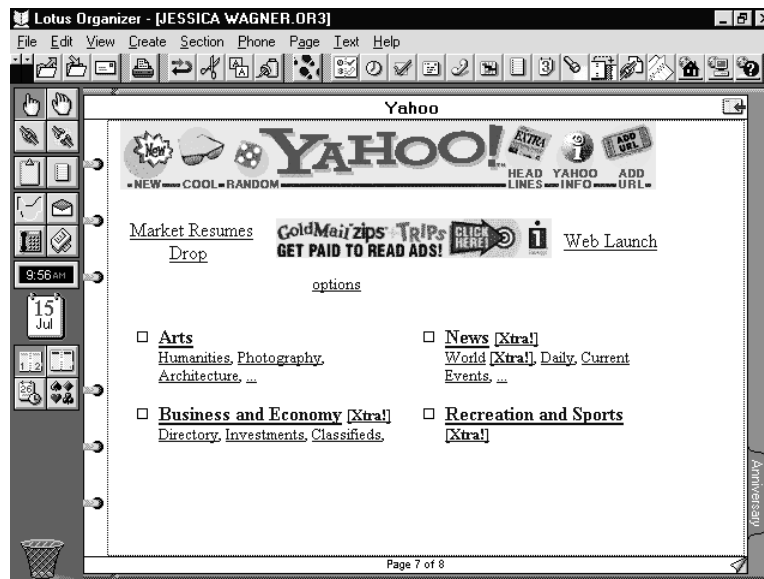


Gain easy access to your own and your team's calendar on the Web, from home or on the road, any time of day or night.

- ❖ View and edit their own and group calendar entries in daily, weekly, and monthly formats.
- ❖ Check and edit tasks.

Easy Web Access and Storage

Lotus Organizer provides a fast, easy way to link and embed Web information directly into the Notepad.



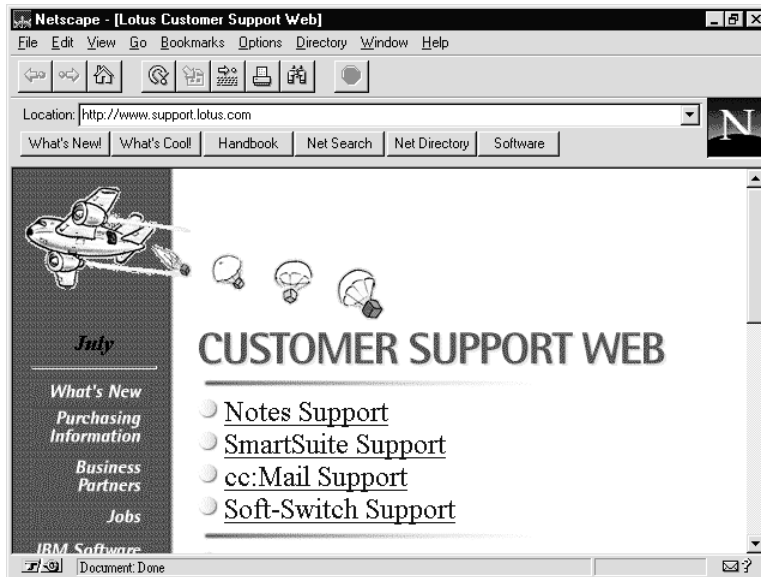
Stay connected to the most up-to-date information available with direct links to Internet sites.

- ❖ Organizer's OLE 2 capabilities let users embed Web pages and URLs in the Notepad section. Users simply double-click to go directly to their selected site, sparing them from retyping the Web site address. (Use of this feature requires a Web browser; popular Web browsers including Netscape 3.0 and Microsoft Exchange are supported.)
- ❖ Users can link Web sites to other Organizer entries, such as to a meeting in the Calendar, giving them a reminder to show the Web page at the meeting, plus quick access to it.
- ❖ Users can take advantage of Notepad's automatic page/chapter feature to efficiently categorize their Web bookmarks.

Quick Access to Lotus Web Pages

With the addition of new Internet SmartIcons to Organizer 97, users are now just one click away from timely Lotus news and product information, from wherever they are in the world, any time of day or night.

- ✧ A single click takes users straight to the Lotus Customer Support Web site for access to the SmartSuite Knowledge Database, where they can enter a query, view Organizer's FAQs, browse the Top 10 Downloads, and more.
- ✧ The Lotus FTP SmartIcon takes users to the Lotus FTP site where they can quickly download new files, such as updated Almanac files and new APIs.
- ✧ Users can explore what's new at Lotus by clicking on the Lotus Home Page SmartIcon.

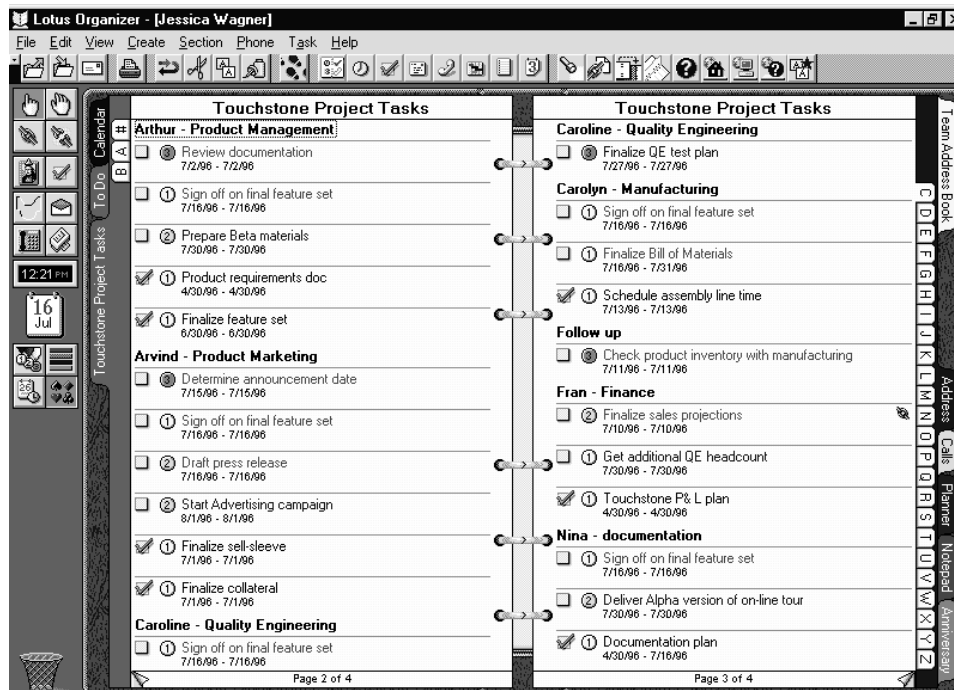


Get the Lotus product and support information you need immediately. A single mouse click takes you to the Lotus Home Page.

Staying Connected: Collaboration Made Easy

Today's business users know that teamwork is a critical part of managing their time and working efficiently. To facilitate and complement the way teams work, Organizer delivers unique sharing capabilities, built upon Lotus' acclaimed Team Computing technology, to enhance group collaboration and help eliminate duplication of effort among team members.

Section Sharing



Keep a separately-tabbed team or project task list right alongside your own to do list.

- ✧ Users can specify single-user access or multiple-user access when saving any Organizer file.
- ✧ Users can add a section or sections from another Organizer file located anywhere on the network to their own Organizer files. As the added section appears under a new tab, users can maintain their own datebook and separate team sections in a single Organizer file.
- ✧ Users can create team to do lists, with multiple-user access, to better manage tasks for projects involving many people.
- ✧ Users can design a team Address book to provide consistent information to all team members and eliminate duplication of effort.
- ✧ Team calendars help ensure that members are informed about team meetings and events.
- ✧ Users can share files on the network with an Assistant or other user who helps keep track of their schedule. Giving Assistant access to an Organizer file means both users can work on the file at the same time.

TeamMail

With TeamMail, users can create and send a message, or an Organizer entry, via cc:Mail, Lotus Notes™, or any VIM- or MAPI-compliant e-mail package to one or more users, without ever leaving Organizer.

- ✧ Users have the option to send selected Organizer entries as the text of their message, eliminating the redundancy of retyping information.
- ✧ Users can save their distribution lists for quickly sending messages to frequently-used addresses and mailing lists.
- ✧ Users have the option to be notified that their messages have been delivered, to ensure that all team members have received the information sent.
- ✧ The TeamMail Toolbox Icon notifies the users when they have received mail from other users on any supported mail system, so important messages won't be missed. To instantly open their new mail, users simply click on the icon.

Security

Users can assign passwords to protect files so that non-authorized users can't view or edit them. Passwords allow three different types of file access:

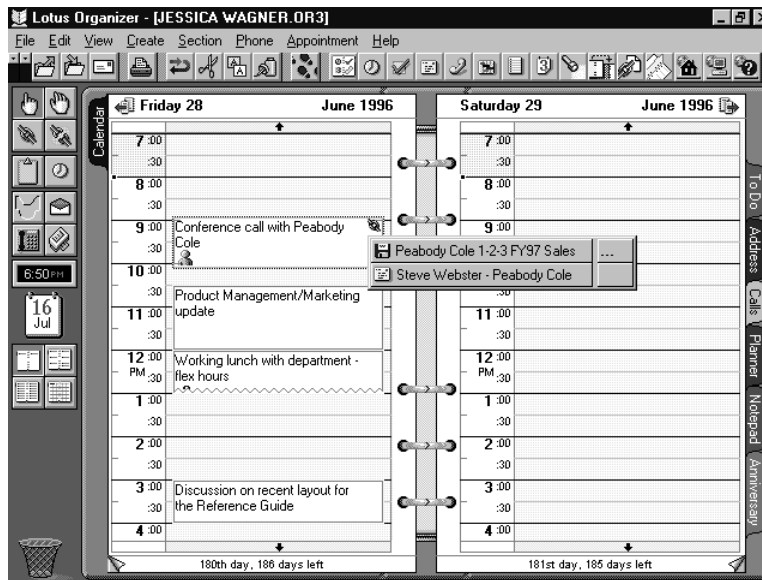
- ✧ Owner Access Level lets a user see and change all entries.
- ✧ Assistant Level lets a user see and change entries, except those marked as Confidential.
- ✧ Reader Level lets a user view, but not change, all non-confidential entries.

Information You Need: Anytime, Anywhere

Today's users need fast, easy ways to harness information from a wide variety of sources, including other PC-based applications, the Internet, corporate databases, the company intranet, or Lotus Notes, as well as data that exists in many different file formats. In addition to its unmatched Internet support, Organizer gives users fast, seamless access to the information they require from a full range of sources.

Linking Capabilities

Organizer offers a range of powerful, yet easy-to-use linking tools to enable users to cross-reference information within Organizer, stay up-to-date with the latest data from external files, and move quickly among linked objects.



Cross-reference information in one or more Organizer sections — or in other applications — with point-and-click ease.

- ✧ By creating links between discrete pieces of information in different Organizer sections, or between entries in the same section, users can cross-reference associated Organizer material. For example, users can link an appointment in the Calendar to both a contact record in the Address section for immediate access to the contact's phone number, and to a page in the Notepad section with directions to a meeting location. A Link icon in the Toolbox makes this a fast, easy point-and-click operation.
- ✧ Users can also link information in Organizer to other files or applications. For example, a user might link a scheduled budget appointment in the Calendar to a 1-2-3 spreadsheet containing budget forecasts for advance preparation or easy reference during the meeting.
- ✧ Users quickly move from one linked item to the next by simply clicking on the link symbol next to the entry.

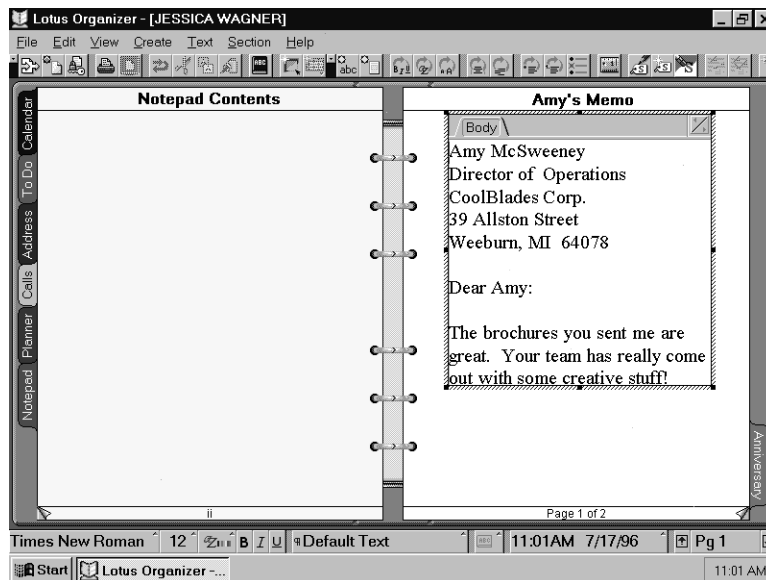
File Format Support

Organizer supports several file formats, making it fast and seamless for users to share information with others, and to leverage information in most databases, spreadsheets, word processors, and other applications directly from within Organizer.

- ✧ Organizer includes import and export capabilities for ASCII (.TXT, .CSV), dBase (.DBF), and FoxPro (.DBF) formats. As most databases, word processors, and spreadsheets accept at least one of these formats, users will very likely be able to use their favorite application files with Organizer.
- ✧ Organizer eliminates the need to retype addresses from an existing database file to the Organizer Address book. A Field Mapping box for import fields lets users include all or some of the existing database fields and connect them with the appropriate fields in the Address section.

OLE 2 Support

OLE 2 (Object Linking and Embedding) support in Organizer 97 gives users a host of options for automatically sharing, linking, embedding, and editing data across a broad range of applications and files. Support for OLE 2 lets users:



Take advantage of live links to data in other applications for the most up-to-date information available.

- ✧ Share data across applications and edit the data directly within Organizer. Users can conveniently centralize important data using Organizer, eliminating the need to search different applications for the information.
- ✧ Link an entry to information that is expected to change, secure in the knowledge that the linked entry will be automatically updated whenever the source file's data changes. For example, a user might create an automatic link between a Organizer Notepad entry and a 1-2-3 spreadsheet that changes weekly. Whenever the user opens the Notepad section to prepare for a monthly update meeting, the spreadsheet automatically displays the latest information.
- ✧ Embed an object that represents data that will be edited or updated in the source application only. For example, a user might embed a Word Pro document that highlights marketing information, on a Notepad page. Whenever information from the Word Pro document is needed, the user simply double-clicks on the Word Pro icon on the Notepad page to open the Word Pro file.

- ✧ Edit objects within Organizer. Users can perform in-place editing on any embedded object whose source application supports OLE 2, and still see their Notepad page in a single window. During in-place editing, the menus and other tools in the window — except for the Organizer File and section menus — belong to the source application for the embedded object. This means users can change data quickly within Organizer without having to launch or switch to the source application. For example, a user might want to directly edit a Freelance Graphics chart with changes that were proposed during a team meeting, for storage in Notepad.

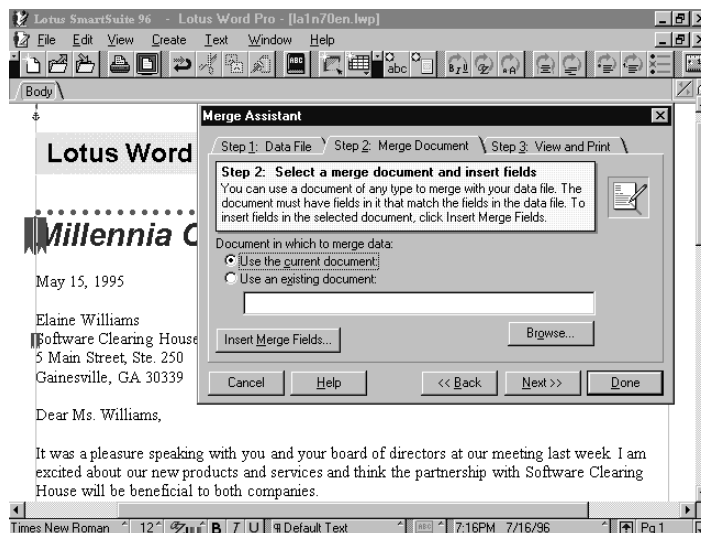
Easily Add New Entries

Users can create entries in any section of Organizer directly from any other section, eliminating the need to switch back and forth, and saving themselves time.

- ✧ For example, while entering a meeting in the Calendar section, a user might want to create a task for completion before the meeting. To do so, he or she simply clicks on the Create Task SmartIcon, which brings up the Create Task Dialog Box. The user simply enters the task information without leaving the Calendar section. When finished entering the task, the user clicks OK. The Task Dialog Box disappears, and the user completes the appointment information in Calendar.

Addressing Capabilities

To help users take full advantage of their investment in maintaining an up-to-date Address book, Organizer works seamlessly with Word Pro for creating mail merges. And it offers a host of options for quickly and effortlessly performing other addressing functions, such as a creating a targeted list or choosing an Address layout.



Execute a sophisticated mail merge quickly and easily using Word Pro's Orgmerge macro.

- ✧ With Orgmerge, a Word Pro macro, users can easily include names and addresses from Organizer's Address section in a Word Pro document. This capability along with the filtering feature can be used to create targeted mailings with just a few mouse clicks.
- ✧ With the Copy Special selection users can paste information from an Organizer Address section into Word Pro or other word processors. Users can also choose any of 10 different layouts for copying, then simply paste entries to their word processor. There's no need for users to retype addresses or worry about typing errors.

Customization: Working the Way You Want

Organizer gives users all the flexibility they need to customize their time management environment to best suit their unique needs and preferences. It provides a full range of options to let users personalize their datebook, and view their entries according to a wide variety of selection criteria so that they can work the way they work best.

Personalized Datebook

Organizer 97 offers users a host of options for personalizing the datebook to suit their own individual preferences and unique ways of working. With Organizer, it's easy and quick for users to:

- ✧ Change the appearance of their Organizer binder to reflect their tastes. Users can easily personalize the name of their binder by simply adding text to the front page, such as their name, company name, and address. Or, they can change the binder's color and texture, choosing from over 256 colors and 15 textures to create their own unique datebook.
- ✧ Rename an Organizer section to describe its use. For example, a user who has added a team Calendar section may want to rename the original Calendar section as My Calendar and the new team calendar as Finance Team Calendar.
- ✧ Reorder Organizer sections to suit their own priorities. For example, a user might want to have the Address section appear before other sections in the datebook.
- ✧ Define the color and size of an Organizer tab section to highlight certain sections over others.
- ✧ Set the section which Organizer opens to. The default is to open to "today's date" in Calendar, but users may prefer to set it up so that it opens up to the To Do section, for example.

View Selections

Organizer gives users easy-to-use features for viewing information in a variety of useful ways.

- ✧ In the Calendar section, users can display information in day, week, two-week, or month views.
- ✧ The To Do list can be sorted by priority, task status, date, or category.
- ✧ Users can sort their Address book by name, company, category, zip code, and more. They can also view the Address book with all the entered information; just a name or address, the contact information, such as phone numbers, fax numbers, or e-mail address; or with only contact name, company, and primary phone number.
- ✧ Users have the option to display their Calls information by name, company, date, or category.
- ✧ The Planner can be viewed on a quarterly or yearly basis.
- ✧ Notepad can be sorted by page number, date, category, or title.
- ✧ The Anniversary section can be displayed by month, year, category, or zodiac sign.

System Requirements

Hardware

- IBM™ PC or compatible (80486/50 MHz).
- Windows-compatible video adapter (VGA or higher) and monitor.
- CD-ROM drive or 3.5" high density disk drive.
- Mouse or other pointing device.

Operating System

- Microsoft Windows 95 or Microsoft Windows NT 4.0.

Memory

- Windows 95: 8MB RAM minimum, 12MB recommended if running more than one application.
- Windows NT 4.0: 8MB RAM minimum, 12MB if running more than one application.

Disk Space

- Minimum install: 15MB.
- Users can run Organizer 97 from the CD-ROM.

Thank you for reviewing Organizer 97!
For more information, please visit the Lotus Web site at <http://www.lotus.com>.

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