

The background of the cover features a large, stylized clock face with a spiral-bound notebook in the foreground. The notebook is open to a calendar page with entries for 'DICERN Thonij 14', 'Febory 15', 'Saphrrp 16', and 'Sughrk 17'. The clock face has a large '12' at the top and various tick marks around the perimeter. The overall design is in shades of gray and black, with the Lotus logo in white on a black background.

Lotus

# Organizer

Control Your Time, Your Contacts,  
Your Information

6  
RELEASE

Getting Started with Organizer

WINDOWS 95, WINDOWS 98,  
and WINDOWS NT 4

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# Chapter 1

## Before You Install

Welcome to Lotus Organizer® 6.0 for Windows 95, 98, and NT. This chapter describes the contents of your Organizer package and helps you prepare to install.

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### What's in your package

Your Organizer® package includes software, documentation, and registration information. The CD-ROM contains all the Organizer software, documentation, and optional applications.

The documentation consists of:

- This book, in both printed and Adobe Acrobat® format (called DocOnline) on the disc
- Extensive Help covering every feature and task you can accomplish with Organizer
- Bubble help for quick clues to features on the screen
- You can also visit the Lotus Organizer Web site, <http://www.lotus.com/organizer>, to keep up to date with the latest developments in Organizer.

Make sure you register electronically or fill out and mail the Lotus registration card enclosed in your package as soon as you finish installing. You need to register to receive information on Organizer updates.

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### What's new in Organizer

Organizer offers the following enhancements to its personal information management (PIM) features:

#### A new Web section

- Create Web entries to manage information about Web pages you frequently visit, including a Web page's login information.
- Automatically send login information from a Web entry to the Web page's login fields in Internet Explorer.

- Use EasyClip™ to copy login information from a Web entry to a Web page's login fields in Netscape Navigator.
- Set different levels of security for Web entries.
- Use a List view to customize and quickly sort Web entry information in your Organizer file so it appears the way you want.

## **Notepad**

- Send a copy of a Web page to a Notepad page when creating a Web entry. The Notepad page and the Web entry are linked together in your Organizer file.
- Download a copy of a Web page to an Organizer Notepad page. You can also link this Notepad page to appointments, To Do tasks, Contact records, and Web entries you create from EasyClip.

## **Calendar**

- Publish your Calendar section as Web pages.
- Use an icon to install a trial version of *eCalendar Companion*™, which provides a list of holidays, festivals, sporting and cultural events, trade shows, and other useful information you can add to the Calendar, Planner, or Anniversary sections in your Organizer file.
- Take advantage of improved Internet scheduling capabilities, including:
  - Using the Internet to send and receive meeting invitations using the Simple MAPI, POP3, or IMAP4 mail protocols, which will provide interoperability with other iCalendar-based applications.
  - Scheduling meetings using the iCalendar standard. You can also schedule meetings with users who have an Organizer 5.0 file, which used an early version of iCalendar-based scheduling.

## **Contacts**

- Use a List view to customize and quickly sort Web entry information in your Organizer file so it appears the way you want.
- Publish your Contacts section as Web pages.
- In batches, change the area codes of phone numbers in Contact records.
- Look up street maps and driving directions for contacts, with options for door-to-door and city-to-city information.
- Use an icon to install *FoneSync*™, which lets you drag and drop names and numbers from your Organizer Contact records to your digital mobile telephone.

## SmartCenter

- Instantly access live Web-based information from leading Internet companies like Yahoo, PC Quote, Intellicast, MapQuest, and Travelocity without launching a browser.

## Other new features in Organizer

- Use the Organizer Browser to view stored Web pages in Organizer, without starting Netscape Navigator or Internet Explorer. Also use the browser to view a stored Web page from a linked appointment, To Do task, Contact record, or Web entry.
- Connect to the Organizer Web site to check for and schedule automatic product updates and feature enhancements for your Organizer release.
- Go to the Stamps.com™ Web site, where you can install software allowing you to purchase and print postage over the Internet (U.S. only).

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## System requirements

To run Organizer, you need:

- A 486 or better processor in a computer that is certified for use with Microsoft Windows 95, Windows 98, or Windows NT.
- Windows 95, 98, or NT operating system.
- A VGA monitor or higher with 256 colors. A resolution of 800 x 600 is strongly recommended, along with setting your display to High Color.
- A minimum of 8MB RAM; 16MB is recommended for Windows 95. A minimum of 24MB RAM; 32MB is recommended for Windows 98 or Windows NT.
- A pointing device such as a mouse or trackball.
- Sufficient hard disk space:
  - 22MB for the Organizer default installation
  - 17MB for minimal installation
  - 37MB for a file server installation
  - 38MB for distribution installation on a server
  - 1MB on a node hard drive when running Organizer off the server

There are six Organizer Extras applications you may choose to install:

<i>Organizer Extras</i>	<i>Space Required</i>
Acrobat Reader	6MB
EasySync™ for Organizer 6.0	1MB
Convert from other PIM files	5MB
OAG Travel Information System®	30MB
Paragon's FoneSync	4MB
SmartCenter™	5MB

**Note** For descriptions of the Extras, see “Installing Organizer Extras” in Chapter 2.

File sizes are based on a particular file allocation table (FAT) configuration and may differ slightly between individual machines.



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## Chapter 2

# Installing Organizer

This chapter tells you how to install Organizer if you don't use any other PIM tools, or how to install and preserve information from PIM tools you currently use. Upgrading from previous versions of Organizer is also included.

If you are a system administrator who needs information about making Organizer available over a local area network, see Chapter 3, "System Administrators."

Organizer combines your Calendar, To Do lists, and Contact information into one powerful application. You can customize Organizer to reflect the way you organize your personal affairs and business life. If you regularly use e-mail and need to schedule meetings with others, be sure to install an Internet e-mail program along with your PC.

**Caution** If you are upgrading from previous versions of Organizer, have files from another PIM to convert, or want to synchronize with your PDA, don't uninstall or erase the old application or files until you have completed the appropriate steps in this chapter. In particular:

- If you use either a 3Com Palm™ organizer or an IBM® WorkPad®, make sure the Palm Desktop software, which includes HotSync, is installed before you install Organizer.
- Do not uninstall the PIM you're converting from until after your information has been successfully converted and is accessible in Organizer.

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## Installing Organizer

When you install Organizer for the first time, the Install program puts the program files Organizer needs on your hard disk.

**Note** The following procedure assumes you're starting Install from a CD-ROM drive. Be sure to close any open programs on your computer before you begin installing Organizer.

1. Insert the Lotus Organizer CD-ROM in your CD-ROM drive.
2. From the Windows taskbar, choose Run.

3. Using the correct drive letter for your computer, type **D:\install** in the Open box and click OK.
  4. Read the Software Agreement and if you accept the terms, click “I Agree.”
  5. Enter your name and company name, and click Next in the Welcome to the Lotus Organizer Install Program screen. The name you enter is recorded as the registered user for the software.
  6. Install asks you to confirm that the names you entered are correct.
    - Click Yes to enter the names and display the next screen.
    - Click No to return to the previous screen and enter the names again.
  7. Follow the instructions that appear on each screen until installation is finished.
- 

## Choosing features to install

When you see the Install Options & Organizer Folder screen, you have the choice to install the default set of features, a minimum set, or a customized set.

Default installs all the program files, Online Help, and the sound files for alarms.

Minimum installs only the Organizer program files.

If you want to select which features to install, choose Customize features to choose from Organizer program files, DocOnline (this book in PDF format), Online Help, and all the sound files. If you choose Customize features, you'll need to select the Organizer features you want to install, and then select the print layouts and paper types on the next tab.

You have finished installing Organizer when you see the Install Complete screen.

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## Installing Organizer Extras

Once Organizer Install is complete, the Organizer Extras dialog box appears.

Installing Extras gives you access to online documentation (through Acrobat Reader 4.0), enables you to synchronize Organizer information with a Palm connected organizer or WorkPad platform, lets you convert from other PIM files, gives you access to flight and hotel information, lets

you drag and drop Contact information to your digital mobile phone, and helps you get quick, easy access to the Internet through SmartCenter. If you don't need any of these extra programs, click Done.

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<i>Organizer Extras Option</i>	<i>What It Does</i>
Acrobat Reader	Installs Adobe Acrobat Reader 4.0 to view or print DocOnline.
EasySync for Organizer 6.0	Installs EasySync to synchronize your Organizer information with your Palm connected organizer or IBM WorkPad.
Convert from other PIM files	Installs filters to convert files in Outlook 97/98, ACT! 3.x, Day-Timer Organizer 98, or Sidekick 97/98 format to Organizer. <b>Note</b> You can convert these files after installation is complete. To convert your files for use with Organizer, first start Organizer. From the File menu, select Convert. For more information, see the online Help in Organizer.
OAG Travel Information	Installs the OAG Travel Information System to link to the world's preeminent source of travel information.
Paragon's FoneSync	Installs FoneSync to drag and drop names and numbers from your Contact records to your digital mobile telephone.
Lotus SmartCenter	Installs SmartCenter to get quick and easy access to the Internet. <b>Note</b> Before you install Organizer on your computer, make sure to first install the 3Com Desktop software, which includes HotSync.

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1. From the Organizer Extras screen, select the Organizer Extra you want to install.
2. Click Install and follow the instructions on each screen.

When you're finished installing Extras, click Done.

## **Installing Organizer Extras at a later date**

You can install the additional products from the Organizer Extras screen without reinstalling Organizer.

1. Insert the Organizer CD-ROM in your CD-ROM drive, and select "Extras."
2. From the window that pops up, double-click the folder for the Extra you want.
3. Click Setup.exe and follow the directions on the screen.

Alternatively, with the CD-ROM in the drive, from the Windows taskbar choose Run. Type one of the following commands, substituting the appropriate CD-ROM drive letter:

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<i>Command</i>	<i>Application</i>
D:\Extras\Acrobat\Ar40eng	Adobe Acrobat Reader 4.0
D:\Extras\Pilot\setup	EasySync
D:\Extras\Upgrade\setup	Conversion filters
D:\Extras\OAG\setup	OAG Travel Information System
D:\Extras\Fonesync\Fssetup	Paragon FoneSync
D:\Extras\Smrtcntr\setup	Lotus SmartCenter

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## Registration card

When you register, you can receive information on Organizer updates. You can register electronically or fill out and mail the Lotus registration card. IBM and Lotus have a policy against redistributing your contact data without your prior permission, so you can register online worry-free.

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## Upgrading from previous versions of Organizer

It's easy to upgrade from previous versions of Organizer. After you have installed Organizer 6.0, simply open your previous files to upgrade them. From the File menu, select the Open command and choose the file you wish to upgrade. Organizer automatically upgrades your data and compacts the file. This process works for files with the extensions .OR5, .OR4, .OR3, .OR2, or .ORG. You may want to take this opportunity to archive information you no longer need.

Organizer 6.0 has significant improvements to the look and feel of the user interface. It allows you to customize the look of your Organizer file with a variety of colors, textures, and sounds. When you upgrade, a dialog box asks you whether you want Organizer to apply new default colors and textures. If you answer "Yes," you'll see the new background texture, tab colors, and tab label colors. Check the user preferences as well, to make sure they still reflect your choices.

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## Converting from other PIMs

If you have been using a PIM *other than* Outlook, ACT!, Sidekick, or Day-Timer Organizer, you may still be able to convert the information you have entered. The following tips may help:

- Open your old application and save your data as a comma-separated text file or a dBase file. Many PIMs have a specific option to do this. Organizer can import comma-separated text files or dBase files. Records in comma-separated text files must be separated by paragraph returns.
- If your previous program used custom fields, make note of what each of these fields was used for and in what order. When you map the current fields to Organizer fields, you may only see “custom field 1” in the dialog box instead of the field name you used. Knowing the contents of this field will help you map it to the correct Organizer field.
- From the File menu, choose Import. Make sure you select the right file type in this dialog box. You also map old fields to new fields here.
- As you work out the mapping from the old fields to the new fields in Organizer, you can save the mapping itself to use again.
- When you’re ready to convert, try it out first in a new, empty Organizer file to test it. If you convert into your own information, then find you don’t like the results, you can replace your file with its backup.

When you’re satisfied that the information is what you want, you can convert again, using the mapping instructions you saved, into your real Organizer file.

## Uninstalling Organizer

If you ever need to uninstall Organizer, uninstall any Extras you have installed first. Otherwise, some of the Organizer registry keys are left on the system.



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## Chapter 3

# System Administrators

This chapter covers technical steps for system administrators who are installing Organizer on a server. It is assumed that system administrators are familiar with their company's network and its policies for distributing software.

There are two ways to install Organizer on a network. The first is to install Organizer so clients can run the program off a server. This is popular in situations where the user's hard disk space is at a premium.

The second method is to install Organizer for distribution throughout the company. This allows employees to install Organizer when they need it. For example, as new employees come into the company, they can install Organizer from a server along with other applications without having to find the CD-ROMs.

In either case, users may need to install at least some of the following applications along with Organizer:

- An e-mail program
- An Internet browser such as Communicator or Internet Explorer
- Synchronization software for their PDA, if applicable

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### Client-Server installation

There are two parts to this installation procedure. First, the system administrator installs the Organizer software on a network file server. Afterwards, other licensed Organizer users install a program directly from the file server to their network node that allows them to run Organizer off the server.

If you want to automate install for users in order to predetermine their selections, read through and edit the `organize/instorg.rsp` file on the CD-ROM.

## Installing Organizer on a network file server

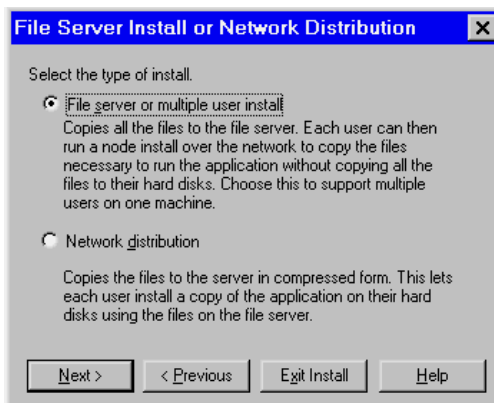
A network file server installation should be performed by a network administrator, or someone familiar with your company's personal computer network, and who has the proper level of network access to create directories on the file server.

To install Organizer on a network file server, run Install from Windows 95, Windows 98, or Windows NT. Be sure to close any open programs on your computer before you begin installing Organizer.

1. Insert the Lotus Organizer CD-ROM in your CD-ROM drive.
2. From the Windows taskbar, choose Run.
3. Type **D:\install** in the "Open" box and click OK.

**Note** If your computer's CD-ROM drive doesn't use the letter "D," substitute the letter of that drive.

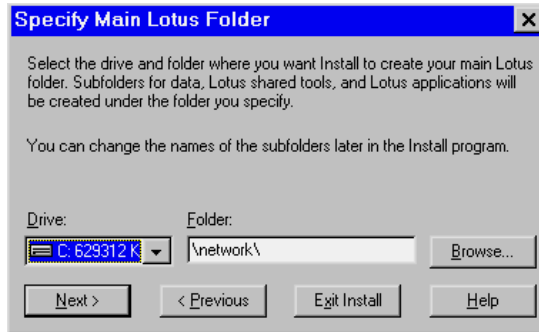
4. Read the Software Agreement and if you accept the terms, click "I Agree."
  5. Enter your name and company name.
  6. On the same screen, select "File server or multiple user install." Click Next.
  7. Install asks you to confirm that the names you entered are correct.
    - Click Yes to enter the names and display the next screen.
    - Click No to return to the previous screen in order to enter the names again.
- Note** The company name you enter here becomes the company name that appears for all users installing from this file server.
8. At the File Server Install or Network Distribution screen, click Next to confirm the file server installation. This choice is the default.





For more information on network distribution, see “Distribution install” later in this chapter.

9. Make sure you print and read the Network Administrator’s Guide. It is saved as readnet.txt and has additional information not included in this book.
10. Enter the server location you want to use on the next screen.



## Customizing the network installation

You’ll be asked to make several configuration choices in the next set of Install screens to complete your network file server installation. When you see the Install Options & Directories screen, you have the choice to install the default set of features or a custom set of features.

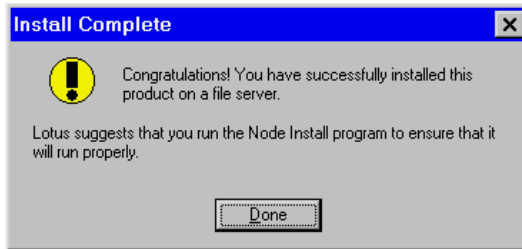
The default set of features installs all the program files, Online Help, and the Organizer sound files for alarms.

The custom set of features lets you choose which features to put on the network screen, including DocOnline (this book in PDF format) and all the Organizer sound files (which are additional to the default sound files).

1. Choose Default or Customize.
2. If you choose Customize, select the Organizer features you want, and then select the print layouts and paper types.
3. Choose the features end users can choose from.

You can install all the features on the network, but make a subset available to end users.

When you're finished, the Install Complete screen appears.



After you've finished installing Organizer on the server, notice that the Start menu now contains a shortcut called "Lotus Organizer Node Install." Perform a node installation to test the system.

## Installing Organizer on a network node

When you install Organizer to run from a network file server on your personal computer (PC) or a laptop computer, you run the Organizer program already installed on the network file server. This option uses only 1MB of space on your computer's hard disk, but you won't be able to use Organizer when your computer isn't connected to the network.

**Note** As the system administrator, you may want to create directions for your users that are specific to your environment.

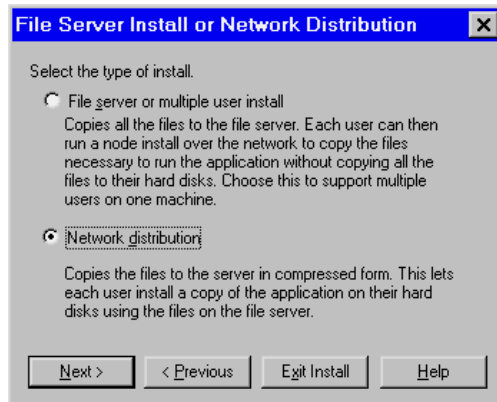
1. From the Windows taskbar, choose Lotus Node Install Organizer, which you will find in the Lotus SmartSuite® folder unless you changed the organization during installation.
2. Enter your name in the appropriate box.
3. Click Next.
4. Install asks you to confirm that the name you entered is correct.
  - Click Yes to confirm the name and display the next screen.
  - Click No to return to the previous screen in order to enter the name again.
5. Follow the instructions that appear on each screen until installation is complete.

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## Distribution install

An installation for distribution of Organizer throughout the company should be performed by a network administrator, or someone familiar with your company's personal computer network, and who has the proper level of network access to create directories on the file server. Be sure to close any open programs before you begin installing Organizer.

1. Insert the Lotus Organizer CD-ROM in your CD-ROM drive.
2. From the Windows taskbar, choose Run.
3. Type **D:\install** in the “Open” box and click OK.  
**Note** If your computer’s CD-ROM drive doesn’t use the letter “D,” substitute the letter of that drive.
4. Read the Software Agreement and if you accept the terms, click “I Agree.”
5. On the Welcome screen, enter the licensee name and the company name. On the same screen, select “File server or multiple user install.” Click Next.
6. Install asks you to confirm that the names you entered are correct.
  - Click Yes to enter the names and display the next screen.
  - Click No to return to the previous screen in order to enter the names again.
- Note** The company name you enter here becomes the company name that appears for all users installing from this file server.
7. Click Network distribution at the File Server Install or Network Distribution screen, and then click Next.



You’ll be asked to supply additional information and make several configuration choices in the next set of Install screens to complete your network file server installation.

8. Follow the instructions that appear on the screen.

You can now give users the path to the server where Organizer is ready for installation.

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## Installing Organizer Extras

When you install Organizer for distribution from a server, the Organizer Extras dialog box is unavailable. You can install the additional products for Organizer on the network directly from the Organizer 6.0 CD. Then copy the entire Extras directory from the CD to the server.

Give users the path to the Extras directory and the appropriate setup program. Tell your users how they can install Organizer Extras from the Start menu, using the Run command with the path that you give them.

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## Uninstalling Organizer

If you ever need to uninstall Organizer, uninstall any Extras you have installed first. Otherwise, some of the Organizer registry keys are left on the system.