Lotus

# Organizer 97 EDITION

**The Leading Time Management Software For Windows**

## EXPLORING ORGANIZER

**WINDOWS 95**

## COPYRIGHT

# Contents

# Chapter 1
# Before You Begin

Welcome to Lotus Organizer® 97 for Windows® 95. This chapter describes the contents of your Organizer™ package and how to use this book.

## What's in your package

Your Organizer package includes software, documentation, and registration information.

### Disks or CD

Your Organizer package includes either a set of 3.5" high-density disks or one CD-ROM.

### Printed and online documentation

Your documentation consists of this book, a quick-reference card, a print layout guide, and online documentation. Online documentation includes Help, Tour, and an Almanac file. For detailed information about Help, see Chapter 3.

| *Documentation* | *Contents* |
|---|---|
| *Exploring Organizer* | Comprehensive printed documentation describing how to perform all Organizer tasks and customize Organizer. |
| *Quick Reference Card* | Printed card that gives you quick reminders on how to perform basic Organizer tasks. |
| *Help* (online documentation) | Comprehensive online documentation showing steps to perform Organizer tasks; includes an index that lets you easily access topics. |
| *Tour* (online documentation) | Animated tour that introduces you to Organizer tasks. |
| *Almanac* (online documentation) | A file that you can consult for reference information that includes holidays, time zones, telephone area codes, important 800 telephone numbers, travel tips, time management information, and more. See ALMANAC.OR3 in the LOTUS\WORK\ORGANIZER path or the path where you installed this file. |

### Registration card

Please fill out the Lotus® registration card as directed. You must mail in your registration card to receive information on Organizer updates.

### How to order more printed documentation

To order additional printed documentation for Organizer 97, call Lotus General Business Sales and Service. In the U.S., call (800) 343-5414; in Canada, call (800) GO-LOTUS or (800) 465-6877.

## How to use this book

*Exploring Organizer* provides a task-oriented approach to learning and using Organizer. It contains information crucial to the novice and helpful to the moderate-to-experienced Organizer user.

### Conventions used in this book

*Exploring Organizer* uses the conventions below.

**Note** introduces additional technical information about a step or procedure.

**Tip** introduces additional information you may find helpful when you perform a command or procedure.

**Caution** provides information essential to the safety of your information and software.

Toolbox icons and SmartIcons® appear next to a step in a procedure when you can use the icon in place of the command(s), or next to information referring to the icon.

Key names appear in small capital letters. For example, **ESC** and **ENTER**.

Key names separated by + (plus sign) indicate that you must press and hold the first key while you press the second key, and then release both keys. For example, **CTRL+Z**.

File names, paths, and directories in italic mean you replace the information with what's correct for you. For example, *x:\file name*.

Information that you type appears in a different typeface. For example, Type Marketing agenda means that you type the words "Marketing agenda."

Commands can appear strung together. For example, File - Open. Click the first command, File, and then choose the second command, Open, by clicking it.

**For more information** directs you to information in Help (online documentation).

# Chapter 2
# Installing Organizer

You can install Organizer as a stand-alone application or on a network. If you install Organizer files on a network (file server or network node), you can share your Organizer files with other users. This chapter instructs you on how to install and run Organizer for the first time, how to upgrade files from earlier Organizer releases, and what new features are part of Organizer 97.

## System requirements

To run Organizer, you need to meet the following requirements:

- Use a 486-based computer that is certified for use with Microsoft® Windows 95.
- Use a VGA monitor.
- Use a mouse, which isn't required but strongly recommended.
- Use Microsoft Windows 95.
- Have 26MB of available hard-disk space on a stand-alone personal computer (PC) or notebook (laptop) computer for a full installation.
- Have 13MB of available hard-disk space on a stand-alone personal computer (PC) or notebook (laptop) computer for a minimal installation of files to run Organizer (without Tour, Help, or samples).
- Have 26MB of available hard-disk space for a full installation on a network file server; installing Organizer to run from a network file server requires 3MB of available hard-disk space on each user's desktop computer.

**Note** Each of the installation options also requires hard-disk space of approximately 5MB for files in a temporary directory. When installation is completed, these files are automatically deleted.

## Installing and setting up Organizer

The following information provides step-by-step instructions for installing and using Organizer as a stand-alone or networked application. If you're upgrading from Organizer Releases 1.x or 2.x, see "Upgrading to Organizer 97," later in this chapter, for instructions on how to convert the files you created with earlier releases of Organizer.

### Before you start the Install program

Before you start the Install program, be sure you have the following pieces of information:

- If you're installing Organizer as a stand-alone application, you need either the Organizer 97 Install disks or the Organizer 97 Install CD from your package.
- If you're installing Organizer to run on a network file server, you need either the Organizer 97 Install disks or the Organizer 97 Install CD. When you complete the file-server installation, users with licenses to run Organizer can install a network node from the file server.
- If you're an Organizer Release 1.x or 2.x user and you want to upgrade (or convert) your current 1.x or 2.x files to Organizer 97 files, see "Upgrading to Organizer 97," later in this chapter.

### Installing Organizer on a stand-alone computer

Before you can use Organizer, you must run the Organizer Install program to transfer Organizer files to your hard disk. Use the installation disks in your Organizer package to install Organizer for the first time. When you install Organizer as a stand-alone application, the Install program stores the files Organizer needs on the hard disk of your computer. This takes up more disk space on your hard disk but it means that your Organizer files will always be available, even if you're not connected to the network.

To install Organizer on a stand-alone computer, run Install from Windows 95.

**Note** The following procedure assumes you're starting Install from a high-density A drive. If you start Install from a different drive, substitute the letter of that drive in this procedure.

1. Insert the Install disk in drive A.
2. Click the Windows Start button and choose Run.
3. Type a:install in the Open box and click OK.

4. Enter your name and company name, and click Next in the Welcome to the Lotus Organizer Install Program screen.

   **Note** The name you enter is recorded as the registered user for the software.

5. Install asks you to confirm that the names you entered are correct.
   - Click Yes to enter the names and display the next screen.
   - Click No to return to the previous screen in order to enter the names again.
6. Follow the instructions that appear on the screen.

## 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 with the proper level of network access to create directories on the file server.

After you or a network administrator installs Organizer on the network file server, other licensed Organizer users must install a network node directly from the file server. Users choose to use either the Organizer program, report, and layout files on the file server (which requires only 3MB of space on their computer's hard disk), or to fully install Organizer on their computer's hard disk (which requires about 26MB of space) so they'll be able to use Organizer when their computer isn't connected to the network.

**Note** The following procedure assumes you're starting Install from a high-density A drive. If you start Install from a different drive, substitute the letter of that drive in this procedure.

To install Organizer on a network file server, run Install from Windows 95.

1. Insert the Install disk in drive A.
2. 

Click the Windows Start button and choose Run.
3. Type a:install in the Open box and click OK.
4. Enter your name and company name, and click Next in the Lotus Install screen.
5. Select Install on a file server.
6. 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 will become the company name that appears for all users installing from this file server.
8. Click Next to complete the file-server installation.

   You will 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. Follow the instructions that appear on the screen.

### Installing Organizer on a network node

When you install Organizer to run from a network file server on your personal computer (PC) or a notebook computer (laptop), you can choose to store all Organizer files on your computer's hard disk or use the Organizer files already installed on the network file server. Choosing the latter option takes up less than 3MB of space on your computer's hard disk, but you won't be able to use Organizer when your computer is not connected to the network.

To install Organizer on a network node, you can run Install from Windows 95.


1. Click the Windows Start button and choose Run.
2. Type *x*:*path*\install in the Open box and click OK.

   *x*:*path* is the drive letter and path for the Organizer directory on your server. For example, type n:\org97\install to start Install from an Organizer directory named ORG97 on drive N.
3. Enter your name in the Name box.
4. Click Next.
5. Install asks you to confirm that the name you entered is correct.
   - Click Yes to enter the name and display the next screen.
   - Click No to return to the previous screen in order to enter the name again.
6. Follow the instructions that appear on the screen.

## Upgrading to Organizer 97

Organizer 97 has a new file format and the extension is .OR3. You can upgrade or convert Organizer Release 1.x or 2.x files to Organizer 97 files. When you upgrade a file, Organizer creates an Organizer 97 file and leaves the old file in its original format and location.

### Upgrading a file from earlier releases of Organizer (1.x or 2.x)

In Organizer 97, when you open a file created in earlier versions of Organizer, you're automatically prompted to upgrade (or convert) your file to the new file format. Organizer keeps the file information as it appears in the original version, except for the following information:

- Address section information is converted into the Street, City, State, and Country fields in Organizer 97 if the Organizer 1.x information was entered in a standard format for US business addresses (for example, 55 Cambridge Parkway, Cambridge, MA 02142).
- For Organizer 1.x files, 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).
- For Organizer 2.x files, addresses without company names show alphabetically under the tabs where they were placed originally.
- Address section information in an Organizer 1.x Type field is converted into the Categories field.
- For Organizer 1.x files, phone log information is converted and inserted in the Calls section.
- Organizer preferences in Organizer 1.x files aren't converted. The Planner key names, however, are converted.
- Repeating entries in Organizer 1.x files are converted as individual, rather than repeating, entries; that is, if you modify one entry, the changes can be applied only to the selected entry.
- Anniversary entries in Organizer 1.x files are set to repeat annually on the same date.
- Included sections from other Organizer 2.x files aren't included in the new Organizer 97 file. You can include only Organizer 97 sections in an Organizer 97 file.

Organizer 97 prompts you to convert your Organizer 1.x and 2.x files to Organizer 97 files.

**Caution** The new default extension for Organizer 97 is .OR3. When you convert a file, Organizer changes the extension from the Organizer 1.x extension (.ORG) or Organizer 2.x extension (.OR2) to the Organizer 97 extension (.OR3). After you convert the file, the Organizer 1.x or Organizer

2.x file still exists in its original format and location, however. While you may open an Organizer 1.x (.ORG) or 2.x (.OR2) file in Organizer 97, you can't open an Organizer 97 (.OR3) file in Organizer 1.x or 2.x.

### Converting your Organizer 1.x file to Organizer 97

1. Remove any included sections from the file.

   See "Removing included sections from an Organizer 1.x file," below, for instructions on how to do this.

2. Use Lotus Organizer 1.x Utilities to check and compress the file.

   See "Checking and compressing your Organizer 1.x file," later in this chapter, for instructions on how to do this.

3. Open and save the file in Organizer 97.

4. Use Organizer 97 to archive any information you don't need on a daily basis.

   See "Archiving information," later in this chapter, for instructions on how to do this.

### Converting your Organizer 2.x file to Organizer 97

Organizer will display a warning if the file you're converting is damaged. Also, the conversion process removes included sections from Organizer 2.x files.

1. Start Organizer 97.
2. Choose File - Open.
3. Click the Files of type box and select Organizer 2.x (*.OR2).
4. Select a file to open.
5. Click Open to open the file.

   Organizer asks if you want to convert the file to an Organizer 97 file. Organizer also reminds you that converted files will increase in size. You can also compact files. See "Compacting Organizer files," in Chapter 13. See "Archiving information," later in this chapter, for information on archiving your file.

6. Click Yes to confirm that you want to convert the file.
7. Organizer converts the file.
8. Click OK when Organizer completes the conversion.

9. Do one of the following actions to automatically open the file or not when you start Organizer:
   - 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.
10. Choose File - Save.

**Note** If you want to reduce the size of this file, you need to archive it. For more information, see "Archiving information," later in this section.

### Removing included sections from an Organizer 1.x file

Included sections are sections that you share with other users. For example, you might have a To Do section in your current file that you share with an assistant or manager. Organizer 1.x files don't automatically remove included sections, therefore you need to remove these included sections before you can convert the file.

1. Start Organizer 1.x and open your file.
2. Make sure you aren't currently in an included section. You can't remove an Organizer section if it is open.
3. Choose Options - Customize.
4. Select an included section and click Remove.
5. Click Yes to confirm the deletion.
6. Repeat steps 3 - 5 for any other included sections.
7. When you are finished removing included sections, click OK.

### Checking and compressing your Organizer 1.x file

You use Lotus Organizer Release 1.x Utilities to check and compress a file. If you can't find Lotus Organizer Release 1.x Utilities or already deleted the files in your Lotus Organizer Release 1.x directory, call Lotus Technical Support at (508) 988-2500.

**Note** The procedure below explains how to start Organizer utilities from within Organizer 1.x. You can also use the Windows Program Manager to start Lotus Organizer Release 1.x Utilities. From Start, run ORGUTILS.EXE in your Lotus Organizer 1.x directory.

1. Start Organizer 1.x.
2. Choose File - Close to close all open Organizer files.
3. Click the System menu in the top left corner of the Organizer window.
4. Choose Run.
5. Select Lotus Organizer Release 1.x Utilities and click OK.
6. Click Open and select your file.

7. Click OK.
8. If Organizer finds any errors, click Yes to repair the file and then click OK to continue. If Organizer doesn't find any errors, click OK to continue.
9. If Organizer prompts you to compact the file, click Yes. Click OK when the file compression is complete.
10. Click Save and then click Close.
11. Click Exit to leave Lotus Organizer Release 1.x Utilities.

**Note** By default, Organizer 97 displays files with the .OR3 extension in the File name list box. You may need to click the List files of type box and select Organizer 1.x (.ORG) to display your file.

### Opening and saving the Organizer 1.x file in Organizer 97

1. Start Organizer 97.
2. Choose File - Open.
3. Click the Files of type box and select Organizer 1.x (*.ORG) .
4. Select a file to open.
5. Click Open to open the file.

   Organizer reminds you to run Lotus Organizer Release 1.x Utilities to check and compact the file.
6. Click Continue.

   Organizer asks if you want to convert the file to an Organizer 97 file.
7. Click OK to confirm that you want to convert the file.

   Organizer converts the file and asks if you always want to open this file when Organizer starts up.
8. Do one of the following actions to automatically open the file or not when you start Organizer:
   - 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.
9. Choose File - Save.

### Archiving information

Organizer 97 lets you archive any information in your file that isn't needed on a daily basis, for example, a previous year's appointments or To Do tasks. You still have access to archived information; however, it is stored in a separate file. Archiving streamlines your Organizer file.

### For more information

For more information on archiving information, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Archiving information
3. Click Display.

**Note** Information from an Organizer 1.x phone log is converted to the Organizer 97 Calls section. If you used the autodialer feature, you may have a large amount of information that you can archive or delete from the file.

## What's new?

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.

#### Address

- Improved features for entering and editing addresses.
- Address label and envelope printing for International address formats.
- Support for TAPI (Telephony Application Programming Interface) dialing, which means more streamlined automatic number dialing capabilities in both the Calls and the Address sections.

#### Notepad

- Rich text formatting, 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 sites and home pages on Notepad pages.

#### 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).

- 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's open.
- New ways to set access rights to your file using passwords.
- 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.

# Chapter 3
# Getting to Know Organizer in Windows 95

Organizer uses the metaphor of a notebook to help you manage tasks you do everyday, such as keeping track of appointments, making lists of things to do, and making notes on phone calls you've made or need to make. It's like a paper-based day planner you may already use to manage your time. For example, Organizer uses tabs that you can turn much like tabs in an ordinary paper day planner. However, with Organizer, your work is in an electronic notebook, which allows you to access and manipulate your information more quickly and more efficiently.

With Organizer, you can create a customized calendar to track meetings and appointments, as well as manage to do lists, long-range events, and anniversaries. You can store contact information in the Address section and also track phone calls for those contacts. Notepad provides a way to capture important text or graphics or store information from other documents and applications. In addition to managing information in separate sections, Organizer lets you see the big picture. You can view all time-related information (To Do, Planner, Anniversary) separately in each section, or together in Calendar. Any entry can be linked to other entries, so you can easily connect Calendar appointments with a client's Address record and directions to the client's site on a Notepad page. Plus, all your information can be printed in over two dozen print layouts, such as a monthly calendar, trifolds (information from several sections), address labels, and task lists.

You can also use Organizer to share calendars, task lists, address books, and other information across your local area network (LAN) with your workgroup. Also, you can e-mail Organizer entries to co-workers by using TeamMail.

## 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 in the Lotus Applications folder. If not, go to the place you installed it.

   Organizer opens to the Calendar section. The Calendar appears with the current day outlined.

## Organizer sections


The Organizer notebook contains the following sections: Calendar, To Do, Address, Calls, Planner, Notepad, and Anniversary. You switch from one section to another by clicking the tabs. Tabs appear in different colors in your Organizer binder to easily distinguish sections. To learn more about each Organizer section, see Chapters 6 - 12.

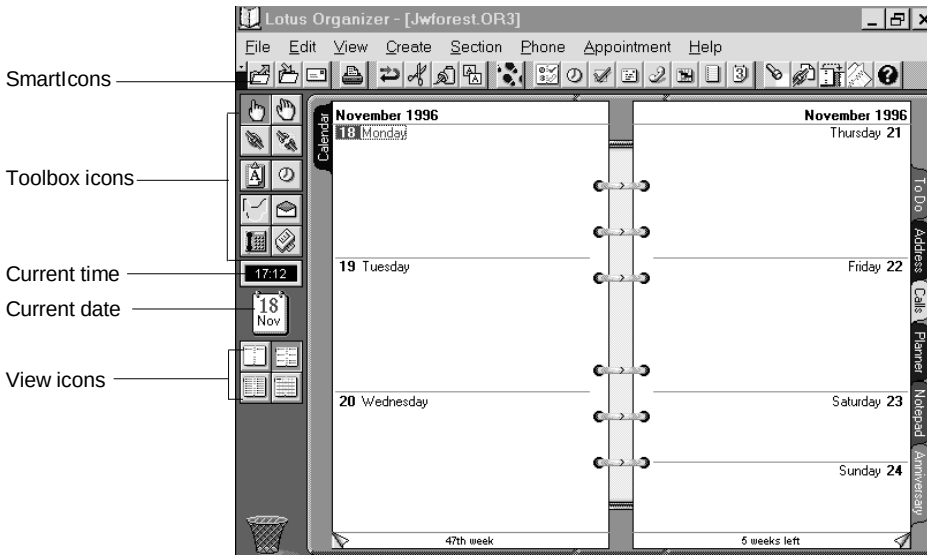
## Icons, mouse pointers, and Organizer symbols

Toolbox icons and SmartIcons provide shortcuts for performing Organizer tasks. To use Toolbox icons and SmartIcons, position your mouse pointer on the icon and click the left mouse button. While you're working in Organizer, you'll notice that the mouse pointer changes depending on what you're doing. The mouse pointers and symbols are discussed later in this chapter.

### Toolbox icons

Toolbox icons let you perform Organizer-specific tasks. For example, you can drag a phone number from your Address section to the Phone icon, and Organizer will dial the phone number if you've installed and set up a modem.

10 Toolbox icons appear on the left side of the Organizer workspace, as well as the Clock and Today's date icons, and View or Sort icons.




You can drag and drop an Organizer entry to the Toolbox icons.

The View and Sort icons let you display entries in different ways. For example, in the To Do section, you can view entries by the priority you assign the entries (such as 1, 2, 3, and None), by the status you assign the entries (such as Current, Completed, Overdue, and Future), by a start date you assign the entries, or by the category you assign the entries (such as Expenses).

The View and Sort icons change depending on what section you're in. Go from section to section (by clicking the section tabs) to see how these icons change. When you've included entries in some of these sections, click one of these icons to see how these View or Sort icons affect the entries. When you click one of these icons, you're only changing how or what information appears. You won't lose any information you added.

## For more information

For more information on how each Toolbox icon functions, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Toolbox icons, list
3. Click Display.

### SmartIcons

SmartIcons let you perform Organizer and other common Lotus application tasks. When you first start Organizer, a set of SmartIcons appears above your Organizer notebook. You can customize which SmartIcons appear in your set. You can change the location of the SmartIcons bar so the set appears along the bottom of your screen, on either side, or wherever you choose to drag it.

### For more information

For more information on where your set of SmartIcons appears, what SmartIcons you want in your set, and so on, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type SmartIcons and make a selection by clicking a topic.
3. Click Display.

### Mouse pointer shapes and Organizer symbols

In Organizer, the mouse pointer can assume various shapes. Shapes change according to what you're doing.

### For more information

For more information on Organizer mouse shapes, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type Mouse pointer, list of
3. Click Display.

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## What's available for online Help

Organizer has online information called Help. Help is organized by task; it provides procedures and overviews that give you general information. Help is concise and oriented toward helping you complete tasks.

There are several ways to access Help:

- Choose Help from the main menu.
- Display Bubble Help for single-line descriptions of areas of the Organizer screen.
- Display context-sensitive Help for information specific to what you're doing or what appears on the Organizer screen.

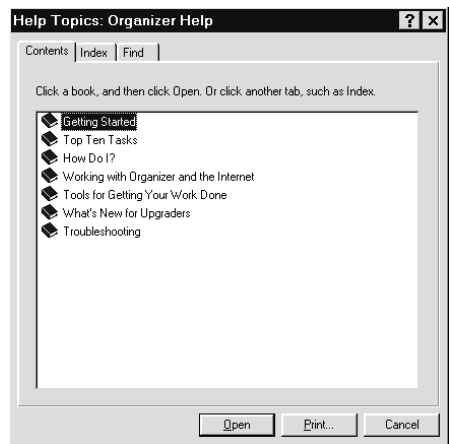
You can display and work in your current Organizer file while a Help window is open. You can also resize, move, tile, or cascade the Organizer window or the Help window to make it easier to display and follow Help procedures while you're working in your Organizer file.

## Choosing Help from the Help menu

When you choose Help - Help Topics, the Help window called "Help Topics: Organizer Help" appears. There are three tabs for three different methods of accessing Help information: Contents, Index, and Find. Click the tabs to switch to the different methods of accessing Help.

### Using Contents

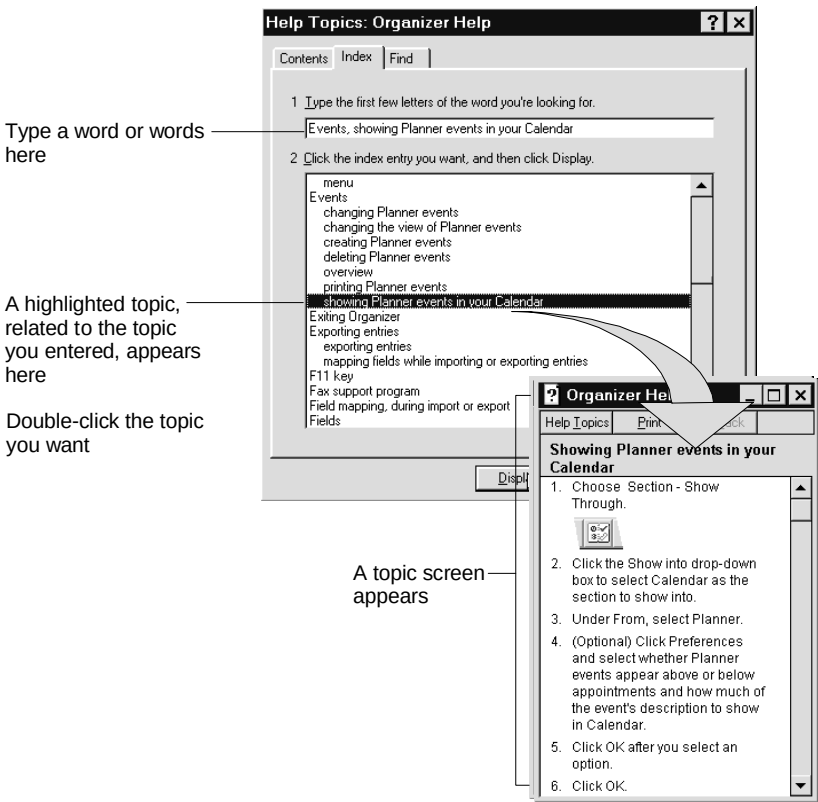
Contents lets you browse through topics in Help much like a table of contents in a book. Contents provides the following top-level topics: Getting Started, Top Ten Tasks, How Do I?, Working with Organizer and the Internet, Tools for Getting Your Work Done, What's New for Upgraders, and Troubleshooting.

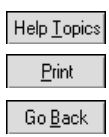



When you double-click a topic, you will either see more topics to select or a procedure for the topic you selected. For example, if you double-click Getting Started, a number of topics appear below it. If you then double-click The Organizer workspace, a Help window appears with information about the Organizer workspace.

### Using Index

Index lets you search for information. You can type a single word, or part of a word in the top box. Index lists topics pertaining to the word or words you typed in the box that appears below.




After you select a topic, use the buttons at the top of the Organizer Help window to get around. You can either click Help Topics to go back to the Help Topics screen, click Print to print the current topic, or click Go Back to return to the previously selected Help topic.

### Using Find

Find lets you search for words or phrases in Help topics. Read the information in the window and make the selection that best suits you. Then click Next and follow the instructions.


You use Find in much the same way you use the Index. However, the Find screen offers broader query options for your search.

## Displaying Bubble Help

Bubble Help describes items on your screen. To find out what an icon does, rest your cursor on the icon and a description appears.


To turn Bubble Help off or on, choose Help - Bubble Help or press **CTRL+F1**. When you move over an area of the screen for which Bubble Help is available, the mouse pointer turns into a dialog bubble with a description of the screen area.

## Getting context-sensitive Help

Organizer provides Help based on the function or command you're using. If you want an overview of an Organizer section, move to the section and click the Help icon or press **F1**. Organizer displays a Help topic overview about the section.

If you want to see context-sensitive Help for an Organizer command, choose the command and click the Help icon or press **F1**. Organizer displays a list of the commands (or menu items) with a description of what each command does. Where appropriate, Help includes cross-references to steps that explain how to use the command.


If you're in an Organizer dialog box, you can click the Help command button or press **F1** for a set of steps that explain how to use the dialog box.

## Working with Organizer files

Organizer 97 uses the .OR3 default extension. For information on upgrading an Organizer Release 1.x or 2.x file, see "Upgrading to Organizer 97," in Chapter 2.

### Creating a new file

1. Choose File - New.

   If you already opened and saved the file, Organizer closes the current file and opens a new untitled file.

   If you already opened but haven't saved the file, Organizer prompts you to save the open file before creating a new file.

2. Click one of the following buttons:

   - Yes to save your changes to the file, close the current file, and then open the new file. If the file doesn't exist on disk, the Save As dialog box appears and lets you enter a file name.
   - No to close the current file without saving your changes and open a new file.
   - Cancel to return you to the current file.

### Opening an existing file

If you saved a file already, you can open an existing file.

1. Choose File - Open.

   The Open dialog box appears.

2. Click the File of type box to select the type of file you want to open.

   For example, if the file is an Organizer 97 file, select Organizer 97 (*.OR3). If the file is an Organizer 2.x file (*.OR2), see "Upgrading to Organizer 97" in Chapter 2.

3. Select the file you want to open in the large list box, or enter a name in the File name box.

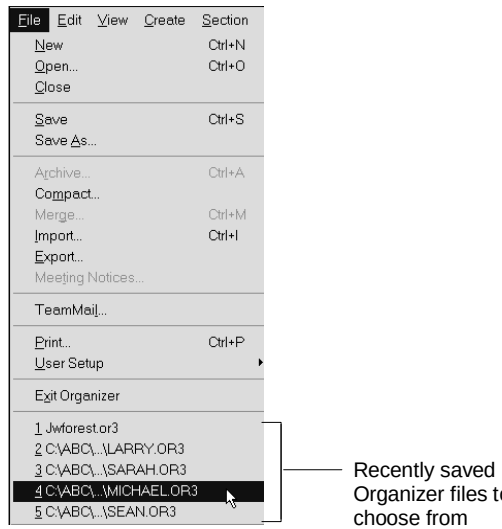
   **Tip** To find where the file might be or what you named a file, click the Look in box to select the path where the file you want to open might be.

4. Click Open.

   Organizer opens the file.

## Quickly opening files you previously saved

Organizer lists the last five files you saved at the bottom of the File menu. To open these files, choose File and then choose the file you want.




## Saving a new file

1. Choose File - Save As.
2. Enter a new name in the File name box.

   You can select different drives and directories in which to save the file using the Save in box.

3. (Optional) If you want to protect the file with a password, click the Passwords button, select Owner, and enter a password.

   See Chapter 13 for more information on setting passwords for Owner, Assistant, and/or Reader.

4. Click OK.

   If you enter a file name that already exists, Organizer asks whether you want to replace the existing file with the current file.

5. Click one of the following buttons:
   - Click Yes to replace the existing file with your current file.
   - Click No to return to the Save As dialog box.

### Saving a file

To quickly save a file to its current name and directory choose File - Save or click the File save icon.

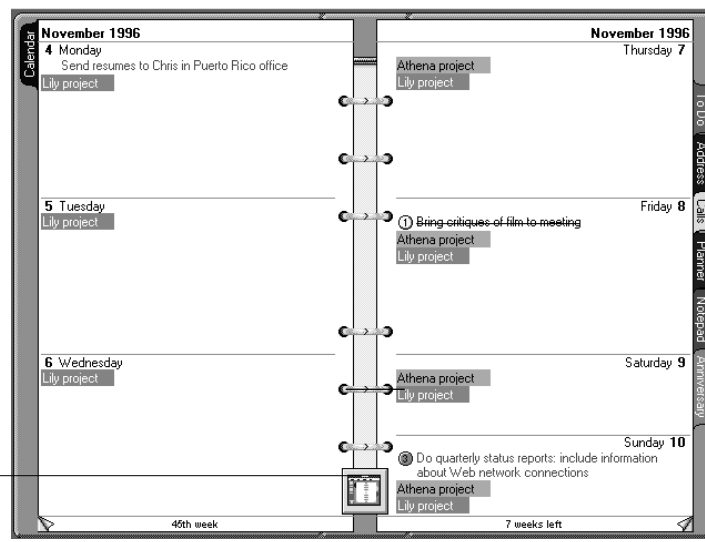
### Saving a file to another name

1. Choose File - Save As.
2. In the File name box, enter a different file name.
3. Click OK.
4. If you enter a file name that already exists, click No to cancel saving the file or click Yes to replace data in the existing file with the data in the current file.

---

## Enlarging your Organizer desktop

You can enlarge or maximize your Organizer desktop and hide Windows controls from the screen by using Clean Screen. When you use Clean Screen, Organizer removes the title bar, menu, Toolbox icons, SmartIcons, Trash, and vertical and horizontal scroll bars so that you have the whole screen to view and edit your Organizer notebook.




Click the Clean Screen icon to restore Windows controls

With 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.**

1. Choose View - Show Clean Screen.

   **Tip** You can also press **F11**.

   An icon appears in the center of the screen when you maximize the screen. You can drag the icon to change its location on the screen.

2. Click the Clean Screen icon to redisplay the Windows controls.

   **Tip** You can also press **ALT+V** and choose Show Clean Screen, or press **F11** to redisplay the Windows controls.

## Ending an Organizer session

1. Choose File - Exit Organizer.

   **Tip** You can also press **ALT+F4** to leave Organizer.

   If you made changes to a file you didn't save, you're prompted whether to save the changes or not.

2. Click one of the following buttons:

   - Yes to save your changes before exiting Organizer.
   - No to discard your changes and exit Organizer.
   - Cancel to remove the dialog box and continue to work in Organizer.

# Chapter 4
# Printing Your Work

Organizer lets you print your Organizer information (or the entries you created) in a variety of professional ways. You can print your work on papers that 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 print entries from one or several Organizer sections, or select specific entries you want to print. 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.

This chapter first explains terms, then explains how to print your work and select layouts and paper types, and last, how to select a printer.

## Understanding basic printing concepts in Organizer

When you're ready to print, you can select the **print layout** (or how you want your information to appear on the printed output) and the **paper type** (or the paper size) you want, and then select any Organizer section (or any information from the section) you want to print.

### Organizer print layouts

What you print reflects the layout you select rather than what you see on your computer screen. Print layouts let you customize what you want to print. That is, you can select a print layout that prints your information as you would like to see it. Organizer includes many predefined layouts, including specific layouts associated with each Organizer section. For example, you can use a label layout to print your Address records, or you can use the monthly calendar layout to print your Calendar appointments. You can also select a layout that includes information from more than one Organizer section, such as one of the trifold layouts. You can also 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.

You can see illustrations of these layouts, grouped by Organizer section, in *Print Layout Guide*.

### Organizer paper types

The other selection you'll commonly make is the paper type to use. 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 8½ x 11" letter paper size, a Rolodex® card size, an 8½ 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.

## Printing Organizer information

There are many ways to print your Organizer information. You can print your day's activities, print information from any section, and print Organizer information for different paper datebooks.

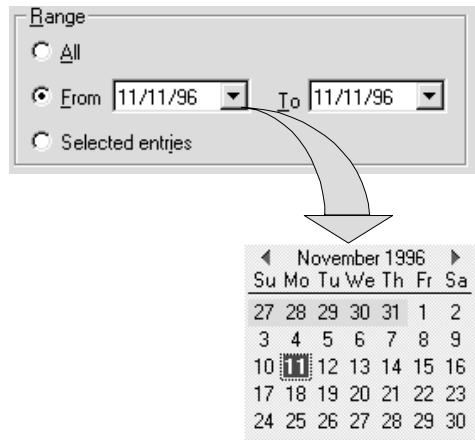
### Printing your day's scheduled activities

You can print only your scheduled activities for the day. You can also print a combination of appointments, tasks, and Calls entries all on one 8½ x 11" piece of paper.

**Note** This procedure assumes that you have entered entries in at least one Calendar, To Do, and Calls section in your Organizer notebook.

1. Choose File - Print.
2. Click the Section box and select Calendar.
3. Click the Layout box and select Daily Calendar / To Do / Calls.
4. Click the Paper box and select Letter 8½ x 11 in.
5. Select Single sided.

6. Under Range, the current date is already selected in the From and To boxes. If you want to select a different date, click the To and From boxes and select the dates you want from the Calendar that appears, or enter the dates.




The current date is the default for any of the daily print layouts. See *Print Layout Guide* for illustrations of the daily layouts available to you.

7. If you have more than one of the same Organizer sections that are included in the Daily Calendar/To Do/Calls (for example, two To Do sections: yours and your manager's), click Sections to select how you want to map your Organizer sections, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section, for example, a personal Address section and another Address section for business contacts. See "Mapping sections," later in this chapter, for more information.

8. Click OK to start printing.

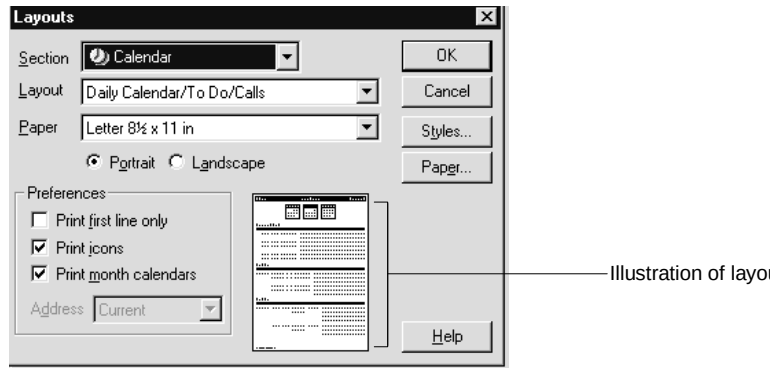
## Printing information from any Organizer section

1. Choose File - Print.

   **Tip** You can also press **CTRL+P**.

2. Click the Section box and select the Organizer section that contains the information you want to print.
3. Click the Layout box and select the layout in which you want your printed information to appear.

To see an illustration of the layout you select, click Layouts. The illustration appears next to the Preferences group box. Click OK to return to the Print dialog box. Also see *Print Layout Guide* for illustrations of all layouts available in Organizer.




The layouts available to you are designed for the section you select. For example, the layouts for addresses include envelope and label. Some layouts are also designed to combine several sections on one printout. For example, the trifold layouts print your Calendar, To Do, Planner, Calls, and Anniversary entries all on a single printout.

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 entries along with your appointments. To do this, select one of the following layouts: Monthly Calendar, Daily Page, or Weekly 2-Page. To show entries from other sections in Calendar, see "Showing other Organizer sections in Calendar," in Chapter 6.

**4.** Click the Paper box and select a paper type.

To see an illustration of the paper style and type you selected, click Layouts, then click Paper. Click OK and click OK again to return to the Print dialog box.

**5.** Select Single sided to print on one side of the page or Double sided to print on both sides of the page.

See "Printing on one or both sides of your paper," later in this chapter, for more information.

**6.** Under Range, select the option for what range of information you want to print.

See "Specifying a range of information you want to print," later in this chapter, for more information.


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 layout that prints information from multiple sections (one of the trifold layouts), click Sections to select how you want to map your Organizer sections, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section. See "Mapping sections," later in this chapter, for more information.

9. Click OK to start printing.

   **Note** If, after you make 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.

**Tip** You can also print an Organizer entry by dragging and dropping the entry to the Printer icon in Toolbox.

## Printing information for different paper datebooks

You can print your Organizer information to fit a specific datebook paper that's already preprinted, such as Franklin Day Planner Classic.

## For more information

For more information on printing your Organizer information to specific datebook paper, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, information for different paper datebooks
3. Click Display.

## Specifying a range of information you want to print

1. Choose File - Print.
2. Under Range, select the options you want.

| *Option* | *Result* |
|---|---|
| All | Prints all pages in the section you selected. |
| From and To | In Calendar, prints entries that fall between a set of dates you specify; select the From and To boxes to set the date in Calendar. In Calls or Anniversary, if you sorted the section by something other than date, prints entries that fall alphabetically or sequentially between the categories, names, and so on, you specify in the From and To boxes. In Address or Notepad, prints entries that fall alphabetically or sequentially between the letters, names, or numbers you specify in the From and To boxes. |
| Selected entries | Prints the entries you selected before you chose File - Print. |

3. Click OK.

## Mapping sections

You can add or create additional sections of Organizer. If you added an Organizer section, you'll have more than one of the same sections in your Organizer file. For example, let's say you included both your manager's and your own To Do section as part of your Organizer file. If you're printing just one of these sections, you can select the section you want to print.

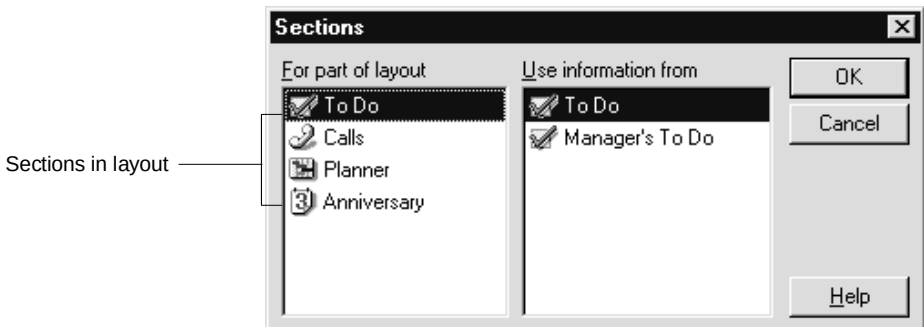
You can only print one section at one time. If you select a trifold layout, you need to specify (map) which section (your or your manager's To Do tasks) you want to print in the To Do part of the layout. If you don't specify the mapping, Organizer prints information from the section that appears first in your Organizer file. That is, if your To Do tab appears before your manager's To Do tab, Organizer will print your To Do tasks first — unless you specify the manager's To Do tasks as the section to print.

1. Choose File - Print.
2. Select those options you want.

   Complete steps 2 - 7 in "Printing information from any Organizer section," earlier in this chapter.
3. Click Sections.

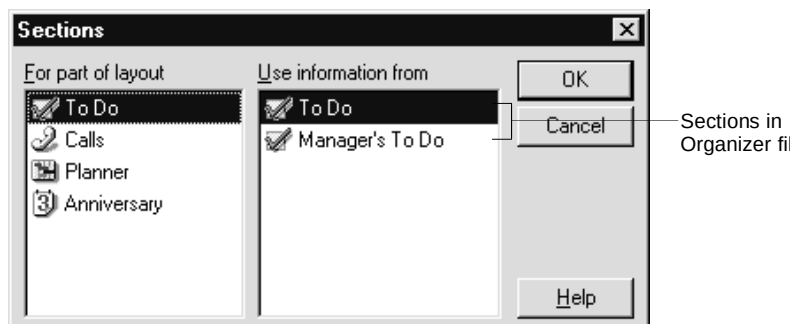
   **Note** If Sections is dimmed, you selected a print layout that doesn't combine information from more than one section. Click the Layout box and select a different print layout, such as one of the trifold layouts.
4. Under For part of layout, select the part of the layout to which you want to map a section.

Organizer lists the sections available in the particular layout you selected. For example, if you select the Daily Trifold Deluxe List layout and you want to print tasks from one of the two To Do sections in Organizer, under For part of layout, select To Do.




5. Under Use information from, select the section whose information you want to print.

   Organizer lists the sections in your Organizer file that are the same type; for example, your manager's To Do section or your To Do section.




6. Click OK.
7. Click OK to start printing.

## Stopping printing

You can stop printing at any time that the Printing dialog box appears by clicking Cancel.

## Customizing print layouts, layout elements, and paper types

You can customize what you print (by selecting a print layout) and the paper size you print to (by selecting a paper type).

Organizer includes many layouts, and in most cases you won't need to change them. You may want to customize a layout to change its orientation on the printed page and to specify what and how much information you want to print. You can also change certain aspects of a layout, called **elements**, such as the header, footer, page number, column headings, grid lines, or the text font. Changing layouts is optional. If you don't change a layout, Organizer uses the default.

In most cases you won't need to customize the predefined paper types that come with Organizer. But for those times when you do, you can customize various aspects of a paper type, such as the margin size, paper size, number of columns, and column widths.

### Customizing print layout options

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 box and select the section for which you want to customize a layout.
3. Click the Layout box and select the layout you want to customize.
4. Select the printing orientation.

| *Option* | *Result* |
|---|---|
| Portrait | Prints information across the width of the page. |
| Landscape | Prints information across the length of the page. |

5. Under Preferences, select the options you want.

| *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 symbols that appear with entries, for example, the alarm symbol or repeating entry symbol. |
| 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 whichever record currently appears in the foreground in the Address section. |

6. If, after you make 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.
7. Click OK to save your changes.

The layout changes will be in effect the next time you print using that layout.

**Tip** You can also customize print layout options by choosing File - Print, selecting the section and layout, clicking Layouts, and then customizing the layout.

## 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 the default settings for these elements, but you can change them. For example, you can change the font color of a title, add a patterned background to column titles, or include a code that prints the current date in the footer.

See *Print Layout Guide* for an example of print elements.

## For more information

For more information on customizing layout styles, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, customizing layout styles
3. Click Display.

## Changing the font size, font type, and font color for printing

You can select a font for any text element, for example, a header or footer in a print layout. A **font type** is a particular lettering style, or typeface (for example, Helvetica) with a particular size, such as 12 point. The fonts available to you often depend on the printer you selected, and whether or not you installed additional fonts in the Fonts folder in the Windows Control Panel.

1. Choose Edit - Layouts.

   **Tip** You can also customize your layout styles by pressing **CTRL+Y**.
2. Click the Section box and select the section for which you want to customize the layout.
3. Click the Layout box and select the layout you want to customize.
4. Click Styles.
5. Click the Element 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, select a typeface.

   You can see the typeface you select under Sample.
8. (Optional) Under Effects, select the options you want.

| *Option* | *Result* |
|---|---|
| Strikeout | Includes or doesn't include (default) a line through your printed text. |
| Underline | Underlines or doesn't underline (default) your printed text. |
| Color | Changes the color of your printed text. (The default color is black.) Click the box to make your selection. |

**9.** Under Font style, select the font attribute you want.

| *Option* | *Result* |
|---|---|
| Regular | Prints the font you select with no attribute. For example, Organizer 97. |
| Italic | Prints the font you select in italic. For example, *Organizer 97*. |
| Bold | Prints the font you select in bold. For example, **Organizer 97**. |
| Bold Italic | Prints the font you select in bold italic. For example, ***Organizer 97***. |

**10.** Under Size, select the point size you want for your font.

**11.** Click OK.

**12.** Click OK.

**13.** Click OK.

The options you select take effect for the next print job you send using that particular print layout.

**Tip** You can also change fonts by choosing File - Print, selecting the section and layout, clicking Layouts, and then clicking Styles to select text elements and change the fonts for text elements.

## Customizing paper types

Organizer comes with a number of predefined paper types, which in most cases you won't need to customize. But for those times when you do, you can customize aspects of a paper type, such as the margin size or paper size. Changing paper type settings is optional. If you don't change the settings, Organizer uses the default paper type.

**Caution** If you make changes to a default paper type and want to keep the original paper type settings, save the changed paper with a new name.

## For more information

For more information on customizing paper types, refer to Help (online documentation).

**1.** Select Help - Help Topics, and click the Index tab.

**2.** Type Printing, customizing the paper settings

**3.** Click Display.

## Selecting global printing options

Global printing options let you select preferences that affect all of your printed work. The changes you make stay in effect until you change them again. For example, you can set Organizer to always print in black and white, or always print on both sides of your paper. You can also select the number of copies to print. Some global printing options are only available for certain paper types: for example, selecting the order that your information prints is only available for paper types that include rows and columns, such as labels.

### Selecting whether to skip blank entries

By default, Organizer prints blank entries (or spaces or pages) where they exist in Organizer sections. You can change this so that Organizer doesn't print blank entries.

1. Choose File - Print.

   **Tip** You can also press **CTRL+P** to select whether or not to skip blank entries.

2. Click Options.
3. Under Preferences, select Skip blank entries.
4. Click OK.
5. Click OK to start printing.

### Printing in color or black and white

By default, Organizer prints in color if you use a color printer; however, you can also print in black and white only.

1. Choose File - Print.

   **Tip** You can also press **CTRL+P** to select the black-and-white printing option.

2. Click Options.
3. Under Preferences, select Print in black & white.

   **Note** If you want to print in color, don't select this option.

4. Click OK.
5. Click OK to start printing.

## Selecting what order to print your information in

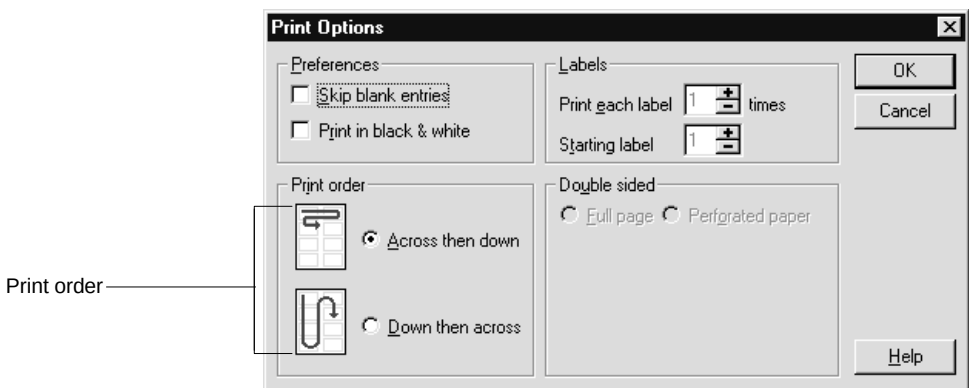
Organizer prints your section information across and then down for paper types that include multiple rows and columns, such as those for labels. You can change the print order so that Organizer prints section information down and then across. This option is unavailable for paper types that don't include multiple rows and columns.

1. Choose File - Print.

   **Tip** You can also press **CTRL+P** to select the order in which to print your information.

2. Click Options.
3. Under Print order, select the option you want.

| *Option* | *Result* |
|---|---|
| Across then down | Prints information in multiple rows or columns from left to right first, and then from top to bottom (default). |
| Down then across | Prints information in multiple rows or columns from top to bottom first, and then from left to right. |




4. Click OK.
5. Click OK to start printing.

## Specifying label options

The label options are available only for label paper types.

1. Choose File - Print.

   **Tip** You can also press **CTRL+P** to select label options.

2. Click Options.
3. Under Labels, enter the number of times to print each label.

You can enter a value, or click + (plus) to increase or - (minus) to decrease the number of labels to print. 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, select the address, select a label layout, then specify 25 copies to print.

4. For Starting label, enter the position of the first label in the sheet of labels that you're printing on.

   For example, 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. To set the print order, See "Selecting what order to print your information in," earlier in this chapter.

5. Click OK.
6. Click OK to start printing.

## Printing on one or both sides of your paper

You can print your Organizer information on one side of your paper (single sided), or both sides of your paper (double sided).

1. Choose File - Print.

   **Tip** You can also press **CTRL+P** to select single-sided or double-sided printing.

2. Select Single sided to print on one side of your paper (default) or Double sided to print on both sides of your paper.
3. If you selected Double sided, click Options.
4. Under Double sided, select the option you want.

| *Option* | *Result* |
|---|---|
| Full page | Prints on two sides of a regular (non-perforated) sheet of paper (default). |
| Perforated paper | Prints the pages sequentially on one side of a perforated piece of paper. |

5. Click OK.
6. Click OK.

## Selecting the number of copies to print

By default, Organizer prints one copy of any information you print. You can print up to 99 copies in a single printing.

1. Choose File - Print.

   **Tip** You can also press **CTRL+P** to change the number of copies.

2. For Copies select the number of copies you want to print.

   Click + (plus) to increase or - (minus) to decrease the number of pages. You can also highlight the number in the Copies box and then enter another number for the copies you want.

3. Click OK to start printing.

## Printing in portrait or landscape orientation

By default, the layout you select determines the orientation. You can change the print orientation when you print Organizer information.

1. Choose File - Print.

   **Tip** You can also press **CTRL+P** to select the printing orientation.

2. Click Setup.
3. Select one of the following options.

| *Option* | *Result* |
|---|---|
| Portrait | Prints information across the width of the page. |
| Landscape | Prints information across the length of the page. |

4. Click OK.
5. Click OK to start printing.

## Selecting printer setup options

You can change various printer setup options. The options available to you are specific to the printer drivers you installed on your system, and differ from printer to printer. See your printer documentation for specific information on your printer.

**Note** The selections you make when you choose File - Print (in the Print, Layout, and Paper dialog boxes), override the options you select in the Printer Setup dialog box. For example, the paper size and orientation you select in Organizer take precedence over the printer setup options you select.

1. Choose File - Print.

   **Tip** You can also press **CTRL+P** to select printer setup options.

2. Click Setup and make your changes.

To display Help for an option in this dialog box, click ? (question mark) in the top-right corner of the dialog box, then click the option or command button.

3. Click OK until you exit all the Setup dialog boxes.
4. Click OK to start printing.

## Selecting a printer

Before you can print information from Organizer, you need to select your printer. Organizer uses the default printer specified in the Printers folder in the Windows Control Panel unless you select another printer. In many instances, the printer you select determines the fonts and other options available to you when you print.

1. Choose File - User Setup - Printer Setup.

   **Tip** You can also choose File - Print and click Setup to select a printer.

2. Click the Name box and select a printer to print from.

   Organizer lists only installed printers. To install a printer, use the Windows Control Panel.

   **Note** The options in this dialog box depend on the type of printer you 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. Other printer settings, such as the way the printer uses memory and prints graphic images, may also be available when you click Properties.

3. Click OK.

Organizer uses the printer you select for the remainder of the current session, unless you select another one.

# Chapter 5
# Customizing Your Organizer Notebook

Organizer comes with seven standard sections: Calendar, To Do, Address, Calls, Planner, Notepad, and Anniversary. You can add additional Organizer sections and rename sections as you like. For example, you can create one Notepad section for meeting notes and another for travel information. You can also reorganize your Organizer sections.

You can use Organizer sections to build complete books of information that are specific to your work. For example, you can create a corporate Organizer notebook, called "Policy," that's accessible to all employees or a personal journal that contains your personal goals and strategies. You can create each notebook as a separate section in one Organizer, or you can create separate files: one called POLICY.OR3, the other called JOURNAL.OR3.

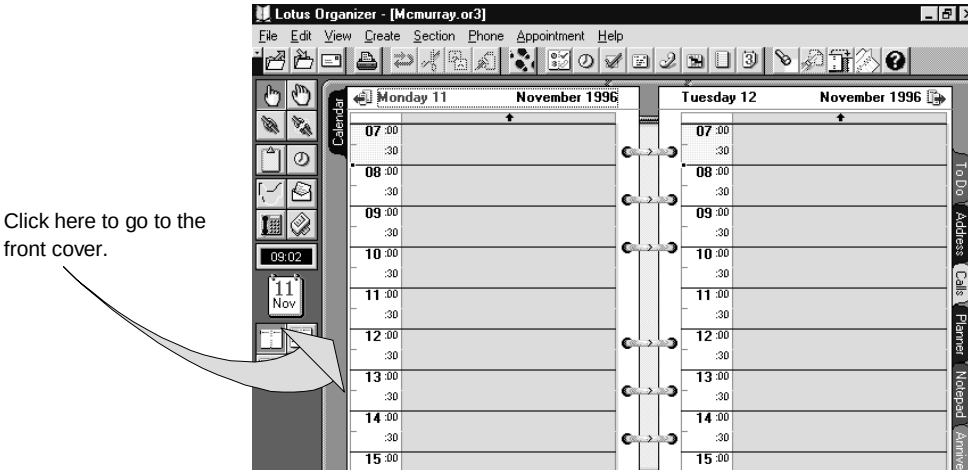
## Customizing your Organizer binder

You can change the appearance of your Organizer binder to reflect your personal style.

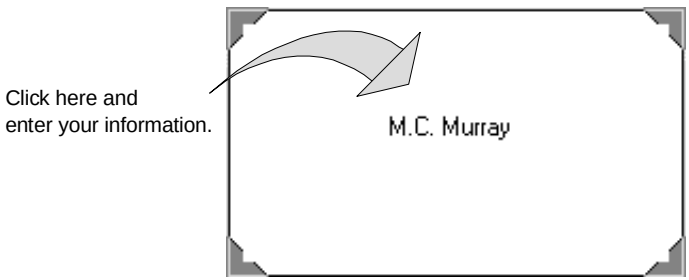
### Changing the name of your Organizer binder

You can personalize the name of your Organizer binder by adding text to the front page. For example, you might include your name, company name, and address. When you save your file, these changes are saved.

1. Click the inside of the front cover of your Organizer binder.




2. Click inside the label area on the first page of the binder.




3. Enter any text that you want to appear.

## Changing the color and texture of your binder

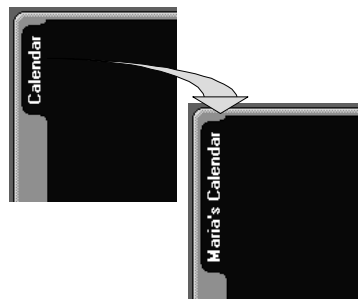
1. Choose Section - Customize.
2. Click the Book tab.
3. Under Binder, click the Color box and select the color you want.
4. Click the Texture box and select the texture pattern for your binder.
5. Click OK.

## Customizing your Organizer file

Organizer lets you customize your individual Organizer files. You can change a section name and the order of section tabs, choose the color, position, size, and width of section tabs, and display a picture on a section divider. You can also add and delete sections, or decide what Organizer section you want Organizer to automatically open to when you start Organizer. The changes you make affect only the current file.

### Changing the name of an Organizer section

The name of a section appears on the section tab.




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 this section.

   For example, type Maria's Calendar if you want to rename the Calendar section Maria's Calendar.
5. Click OK.

   The new section name appears under Tabs.
6. Click OK.

### Adding a new Organizer section

You can add new Organizer sections, and 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.

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 box and select the type of Organizer section you want to add.
5. For Section name, enter a name for the section you want to add.

   For example, Amy's Tasks.
6. Click OK.

   The new section name appears in the list under Tabs.
7. Click OK.

### Changing the order of your Organizer sections

When you change the order of your Organizer sections, you change the position of the section tab in your binder.

1. Choose Section - Customize.
2. Under Tabs, select the section tab you want to reorder.
3. Click Up or Down to move the section tab up or down the list.
4. Click OK.

### Changing the color of an Organizer section tab

1. Choose Section - Customize.
2. Under Tabs, select the section tab whose color you want to change.
3. Click the Color box and select the color you want for the section tab.
4. Click OK.

### Changing the size of an Organizer section tab

You can change the size of an Organizer section tab to display more or less of the contents on the tab.

1. Choose Section - Customize.
2. Click the Book tab.
3. Under Tab preferences, select the options you want.

| | *Option* | *Results* |
|---|---|---|
|   | Size to name | Makes the section tabs only as large as the section name (default). For example, the section tab with the name Planner will be larger than the section tab with the name Calls. |
|   | Overlap by | Overlaps the section tabs the amount you specify (15% is the default). You determine how much of the tab names show. |
|   | Width | Makes the width of all the section tabs narrow, medium (default), or wide. If you make your tabs wider, the section pages become slightly narrower. If you make the tabs narrower, the section pages become slightly wider. |

4. Click OK.

## Setting your Organizer file to open to a particular section

You can choose where you want your binder to open to each time you open your Organizer file.

1. Choose Section - Customize.
2. Click the Book tab.
3. Click the Open to box and select where you want to open to.

   The default is to open to today's date in Calendar or to the Organizer front cover, if no Calendar section exists.
4. Click OK.

## Changing the font size for all Organizer sections

The font-size settings determine the size of a font (a particular lettering style or typeface, such as Times) that appears throughout your Organizer notebook. Changing the font size affects text you see on your Organizer desktop, for example, the text on section tabs, and the text for an entry on the page.

1. Choose Section - Customize.
2. Click the Fonts tab.

3. Under Font Size, select the options for how you want your font to appear.

| *Option* | *Result* |
|---|---|
| Default | Displays text in 8 point size. For example, this is 8 point. |
| Medium | Displays text in 10 point size. For example, this is 10 point. |
| Large | Displays text in 12 point size. For example, this is 12 point. |
| Scale with window size | For any font size you select, maintains the correct shape and proportion of all text you enter. |

4. Click OK.

**Note** This procedure 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. To change selected text on a Notepad page, see Chapter 11, "Centralizing Information in Notepad."

### For more information

To learn how to delete section tabs or to add a picture to a section divider page, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Removing, sections

   Changing, picture for a section
3. Click Display.

## Customizing 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.

The default file options you select determine which Organizer file will open automatically when you start Organizer, and whether new Organizer files will be based on an existing one. The environment options you select 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. The folders options you select 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. Finally, the save options you select determine whether Organizer will automatically save your file and when.

## Selecting an Organizer file to open automatically

1. Choose File - User Setup - Organizer Preferences.
2. Select one of the following 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). |

   If you select Automatically open, you can enter the name of the .OR3 file directly in the box or you can click Browse to see the Organizer files available to you. Select the file you want and click Open.

3. (Optional) For Base new Organizer file on, enter the name of a file to base new Organizer files on.

   For example, you can base new Organizer files on an existing file whose sections and colors you've customized.

   Click Browse to see the Organizer files available to you. Select the file you want and click Open.

4. Click OK.

## Changing Organizer display settings

Display settings determine whether or not the clock and today's date appear in Organizer, and whether animated pages turn when you click the page-turner symbols. By default, Organizer displays the Clock and Today's date icons in Toolbox, and page-turner symbols appear so you can turn the page by clicking them. You can choose whether or not to use these display settings.

1. Choose File - User Setup - Organizer Preferences.
2. Click the Environment tab.
3. Under Display, select the options you want.

| *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. |

4. Click the Weeks start on box and select what day of the week you want your work week to start on.
5. Click OK.

### Changing how Organizer displays the date and time

To control the way the date and time appears, go to Regional Settings in the Windows Control Panel.

## For more information

To learn how to change the way Organizer displays mouse pointers, how to change your favorite Alarm tune, how to change the sounds that Organizer plays, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Preferences, changing alarm

   Preferences, changing display

   Preferences, changing mouse pointer

   Preferences, changing sound
3. Click Display.

## Changing Organizer paths

Paths are used to specify the directories (folders) where you want to store similar kinds of Organizer information. You can select one folder for your Organizer files, another for print layouts, another for icons, and another for backup files. You can change the defaults to suit your needs.

Let's say you want separate directories for your business and personal Organizer files; for example, \ORGANIZER\ORGFILES\WORK and \ORGANIZER\ORGFILES\HOME. You can change the Organizer files directory to\ORGANIZER\ORGFILES\HOME when you want to work with your personal files; you can change the Organizer files path to \ORGANIZER\ORGFILES\WORK when you want to use your business files.

1. Choose File - User Setup - Organizer Preferences.
2. Click the Folders tab.

**3.** Select the paths appropriate for you.

| *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 (*.PLT) and report files (*.REP) | 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 |

Click Browse to see the directories or folders available to you. Select the folder you want and click OK to return to the Folders tab.

**4.** Click OK.

## Changing automatic save and backup preferences

You can automatically save your files after each change or at the interval of time you specify. For example, you can have Organizer save your file after each change, only when told, or every so many minutes (depending on a number you specify). You can also specify that when you open a file, Organizer creates a backup file with the same file name and extension in the backup directory. Then, if you accidentally save changes to the file, you can restore the previous version.

**1.** Choose File - User Setup - Organizer Preferences.

**2.** Click the Save tab.

**3.** Select the options you want.

| *Option* | *Result* |
|---|---|
| After each change | If your file has multiple-user access, automatically saves your changes after every edit or update you make (default). |
| Every min | If your file has single-user access, 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. |

*Continued*

| *Option* | *Result* |
|---|---|
| Ask for confirmation first | If your file has single-user access, prompts you to confirm each save before your file is saved at the time interval you specify. |
| Only when told | If your file has multiple-user access, saves your file only when you choose File - Save or File - Save As (default); prompts you when you close a file without saving it. |
| Create backup when opened | If your file has single-user or multiple-user access, automatically creates (default) a backup file in the backup directory with the same file name and .OR3 extension, each time you open the file. Click the Folders tab to specify a backup directory. |

Your file is saved to whatever path you're in; that is, whatever path you opened your file from, if you didn't make any changes to this path.

See "Specifying how many users can access a file at one time," in Chapter 14, for more information.

**Note** You can create an immediate backup at any time by clicking Make Backup Now.

4. Click OK.

## Changing the set of SmartIcons you want to display

Organizer has four default sets of SmartIcons: Universal (default), Working Together®, Text, and OLE. Each of these sets of SmartIcons are related and provide you with quick access to many Organizer tasks.

1. Choose File - User Setup - SmartIcons Setup.
2. Under Bar to set up, click the Bar name box and select the set of SmartIcons you want to display.

   Organizer lets you choose from the following default sets of SmartIcons; however, you can create and then choose a custom set of SmartIcons. See "For More Information," below, for information on how to create a custom set of SmartIcons.

| *Option* | *Result* |
|---|---|
| OLE | Lets you insert objects and access the Manage Links dialog box. |
| Text | Lets you set font sizes, font styles, and alignment. Use this set when you edit a Notepad page. |
| Universal | Lets you perform most Organizer menu commands (default). |
| Working Together | Lets you start other Lotus SmartSuite® applications, if they're installed. |

3. Click the Bar can be displayed when context is box and select the option you want.

| *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. |

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.

   This option works in conjunction with your selection to control which set of SmartIcons appears when you edit Notepad pages.

5. Click OK.

## For more information

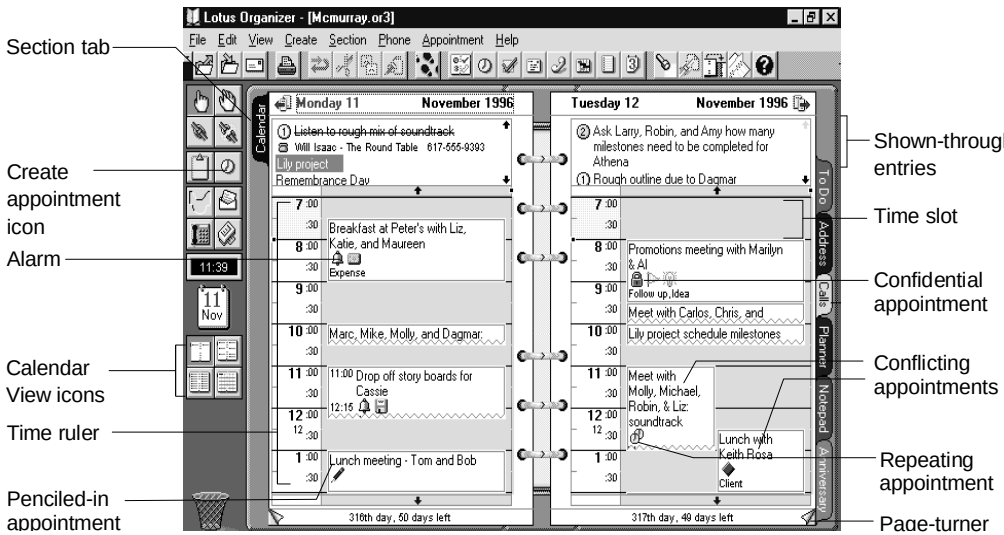
To learn how to position a set of SmartIcons, change the size of SmartIcons, add a set of SmartIcons, customize your own set of SmartIcons, delete a set of SmartIcons, create a new icon, or change an icon, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type SmartIcons
3. Select the index entry you want, and click Display.

# Chapter 6
# Managing Your Time with Calendar

The Calendar section lets you manage your time and view appointments at a glance. Entries you create in Calendar are called **appointments**. With Calendar, you can create and change appointments, set alarms to remind you of appointments, and create tentative appointments. Organizer even helps you find time in your Calendar when you try to book a conflicting appointment.

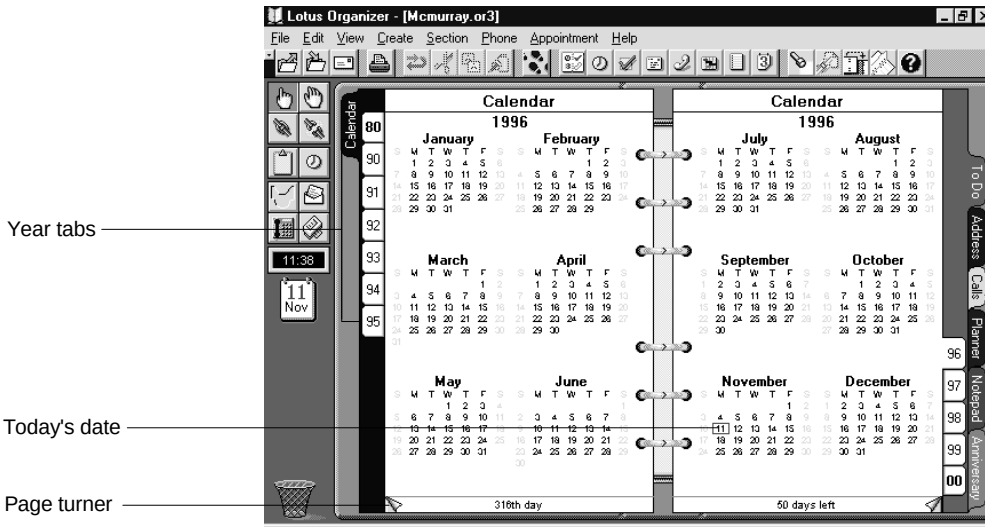
Organizer also lets you show information in Calendar from other Organizer sections, so that you can see your upcoming commitments in the context of your daily work. For example, you can see To Do tasks you need to complete and calls you need to make, along with your appointments.



## Finding your way 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 sides of the calendar.




**2.** (Optional) To display the Calendar for a different year, 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 you want to go to.

**Tip** To go directly to today's date, click the Today's date icon in Toolbox. To move around when you're viewing Calendar, turn your page by clicking the page turners in the bottom-left and bottom-right corners.

### 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.

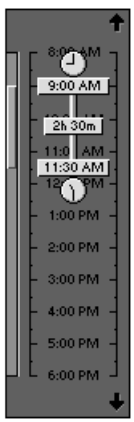
## Creating a Calendar appointment

1. In the Calendar section, double-click the Calendar page.

   **Tip** You can also choose Create - Appointment or press **INS** when you're in the Calendar section to create an appointment.

   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. See "Viewing your Calendar appointments," later in this chapter, for information on displaying the Day per page view. See "Customizing Calendar," later in this chapter for information on displaying time slots.

2. If necessary, click the Date box and select a date for the appointment.

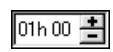



   To move to the previous or next month, click the arrows at the top of the calendar. You can also click the Date box, then press ↑ and ↓ to change to the previous or next day, or enter a date in the Date box.

3. If necessary, click the Time box to use time tracker and select a time for the appointment to start and end.

   See "Setting the time and duration of an appointment using time tracker," later in this chapter, for more information.

   If necessary, click the Duration + (plus) to increase or - (minus) to decrease the duration of the appointment.




4. Under Description, enter a description of the appointment.

   For example, "Staff meeting," or "Interview with Erin McIntyre."

5. (Optional) Click the Categories box and select a category for your appointment.

   See "Working with categories," in Chapter 13, for more information on assigning categories.

6. Select the options you want.

| *Option* | *Result* |
|---|---|
| Warn of conflicts | Alerts (default) or doesn't alert you when there's a conflict with the appointment and another appointment or meeting. |
| Pencil in | Enters a tentative appointment. |
| Confidential | Makes or doesn't make (default) the appointment 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. See "Sharing files," in Chapter 14, for more information. |

7. (Optional) Click Alarm to set an alarm for your appointment, click Repeat to make an appointment repeat at intervals you specify, and/or click Cost to assign a customer and cost code to your appointment.

   See Chapter 13 for more information on setting an alarm, creating repeat intervals, and/or assigning customer and cost codes.

8. To create additional appointments, click Add and repeat steps 2 - 7.
9. When you finish entering all your appointments, click OK.

### Creating an entry in any Organizer section from another section

You can create entries in any section of Organizer without going to the section where you want to create the entry.

Let's say you're in the Calendar section, and you want to create a task you must complete before you go to the appointment you just scheduled. Choose Create - Entry In - To Do. Though you're in the Calendar section, the Create Task dialog box appears, and you can enter your task information without leaving the Calendar section. See "Creating a To Do task," in Chapter 7, for more information.

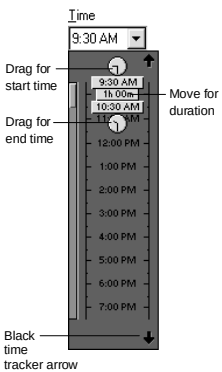
### Setting the time and duration of an appointment using time tracker

You can use time tracker to change the start and end times of an appointment and to control an appointment's duration.

1. In the Calendar section, create or edit an appointment.

   To edit an appointment, see "Changing an appointment," later in this chapter.

2. Click the Time box to display time tracker.




3. To change the start time of an appointment, drag the top clock on time tracker.

   You can also press and hold **SHIFT** while you press ↑ or ↓ to change the start time and duration of an appointment.

4. To change the end time of an appointment, drag the bottom clock on time tracker.

   You can also press and hold **CONTROL** while you press ↑ or ↓.

5. To move the entire appointment while keeping the same duration, drag time tracker using the duration time (the center bar) in the middle.

   You can also press ↑ or ↓ .

   **Tip** To show times that aren't currently in view, click the black time tracker arrows at the top or bottom of the box.

6. Click OK.

## Finding time for an appointment

There are occasions when you need to schedule an appointment for whenever you're next available. Finding your next free time slot saves you the bother of looking through your calendar manually. You specify the duration of the appointment, and let Organizer find the next available time slot in your schedule. Organizer searches through each day, looking for an opening of the specified duration.

Organizer uses the default start-of-day and end-of-day settings in your Calendar in a search to find time, and it doesn't include weekends in its search. You can change the time your days start or end in Calendar by choosing View - Calendar Preferences and clicking the Days start at or Days end at boxes and selecting new times. To include weekends in Organizer's search for an alternative time, select the Include weekends option in Find Time search in the Calendar Preferences dialog box.

1. In the Calendar section, create or edit an appointment.

   To edit an appointment, see "Changing an appointment," later in this chapter.

   If necessary, click the Date box and select the date you want Organizer to begin looking for free time.
2. If necessary, click the Duration + (plus) to increase or - (minus) to decrease the duration of the appointment.
3. Click Find Time.

   The Date and Time settings in the dialog box change to show the next available time for the appointment.
4. If necessary, repeat step 4 to search for another available time.
5. Enter any other information for the appointment you want to add or change.
6. Click OK.

## Setting up a tentative appointment

You can set up a tentative appointment in Calendar by penciling in the appointment. Let's say that the Sales department in your organization is planning a lunch-time seminar on Friday, November 29. You're not sure if you'll be able to make the seminar, but you don't want to forget about the date and other particulars of the appointment.

1. Create or edit an appointment.

   To edit an appointment, see "Changing an appointment," later in this chapter.
2. Select Pencil in.
3. Click OK.

In the weekly and daily views, Organizer displays your appointment with a pencil-in symbol in your Calendar. If you customized your preferences in Calendar to indicate that you don't want the symbol to appear, the pencil-in symbol won't appear with your appointment. See "Customizing Calendar," later in this chapter, for more information.

**Tip** You can also quickly pencil in an existing appointment in the Calendar section. Select the appointment and choose Appointment - Pencil in.

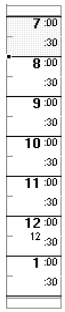
## Booking and handling conflicting appointments

If you created two appointments for the same time, Organizer displays the Conflicting Appointment dialog box to warn you of the conflict (unless you use View - Calendar Preferences to indicate that you don't want to be alerted). You can either schedule the appointment as a conflict, or resolve the conflict by changing appointment information in the Conflicting Appointment dialog box. To schedule the appointment as a conflict, click OK. To resolve the conflict, perform the steps below.

1. Do one of the following:
   - Change the date, time, and/or duration of the appointment.
   - 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.

If you decide to enter the appointment and a conflict still exists, Organizer displays both appointments with a vertical red line to the left of the conflicting entries.




**Note** In the Day per page view, if you're 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're scheduling it intentionally. See "Viewing your Calendar appointments," later in this chapter, for information on displaying the Day per page view. See "Customizing Calendar," later in this chapter, for information on displaying time slots.

## Changing an appointment

You can change or edit existing appointment text directly, and you can drag and drop the appointment to a new date. To edit an appointment directly, click the appointment to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

**Note** When you're 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. To change the start time, drag the appointment to another time; to change the duration, drag the appointment's top or bottom border. See "Viewing your Calendar appointments," later in this chapter, for information on displaying the Day per page view. See "Customizing Calendar," later in this chapter, for information on displaying time slots.

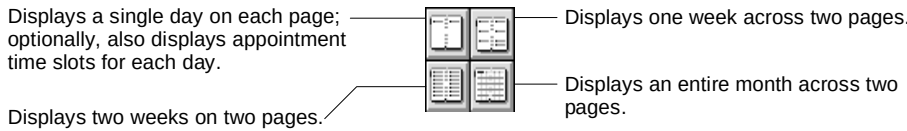
### For more information

For more information on how to add information to appointment fields you previously left blank, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Changing, appointments
3. Click Display.

## Viewing your Calendar appointments

You can quickly display Calendar entries as a single day on each page, a one-week spread across two pages, a week on each page, or a month spread across two pages, by clicking one of the View icons in Toolbox.




The View icons change depending on what section you're in, so the view that you pick affects only the Calendar section you're in. Click a View icon to see how your view of Calendar changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

## Showing other Organizer sections in Calendar

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

See Chapter 4 for more information on printing shown-through entries in Calendar.

1. In the Calendar section, choose Section - Show Through.
2. Click the Show into box and select Calendar.
3. Under From, select the sections whose information you want to appear in Calendar.

   For example, you can select To Do to show your tasks, Planner to show your events, Calls to show your Calls entries, and Anniversary to show your special dates through to the Calendar section.
4. Click Preferences and select the options for how you want shown-through information to appear in Calendar.

| *Option* | *Result* |
|---|---|
| Above appointments | Displays entries above appointments (default). |
| Below appointments | Displays entries below appointments. |
| First line only | Displays only the first line of entries from other sections above or below 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.

5. Click OK.
6. Click OK.

## Customizing Calendar

In the Calendar section, you can set various preferences to customize how your appointments appear and what information appears with them. Changing preferences is optional. If you don't change your Calendar preferences, Organizer uses default preferences.

### For more information

For more information on customizing Calendar preferences, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Calendar section, customizing preferences in
3. Click Display.

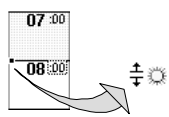
### Working with time slots in the Day per page view

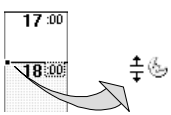
Displaying time slots in the Day per page view is particularly useful when your day is a series of scheduled appointments because both booked and available time slots are displayed.

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 start and end times for the day, and the time slot increments.

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

When you display time slots in the 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. The pointer changes to include a sun symbol.
   - Position the mouse pointer on the solid box to the left of the current end time. The pointer changes to include a moon symbol.
2. Drag the solid box to change the time.

**Tip** When you change the time slots, 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.

### Changing the time-slot increments from the Day per page view

When you display 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.

## Printing your Calendar appointments

Organizer prints appointments by date.

To quickly print an appointment, drag and drop the appointment to the Printer icon in Toolbox.

### For more information

For more information on printing your Calendar appointments, see Chapter 4, or refer to Help (online documentation).

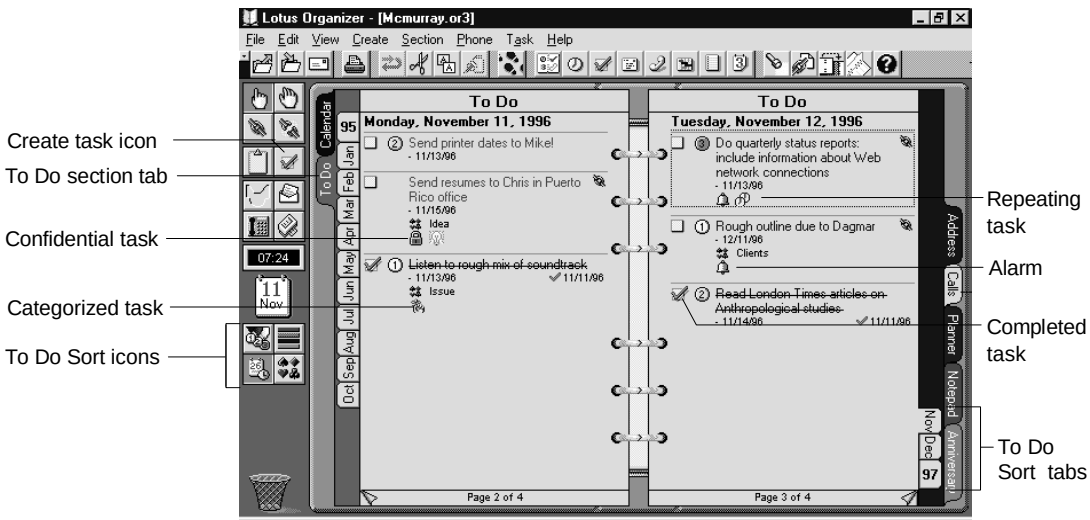
1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, Calendar appointments
3. Click Display.

## Other things you can do

For more information on how to copy, move, and delete Calendar appointments, and how to set alarms for appointments, create appointments that repeat at intervals you specify, create links, assign categories and cost codes, and search for information in Calendar, see Chapter 13.

# Chapter 7
# Managing Your To Do List

The To Do section lets you keep track of what you want to do and when you need to do it. Entries you create in To Do are called **To Do tasks**. You can organize these tasks with categories, prioritize tasks by status, set alarms for tasks you need to do at certain times, and mark tasks confidential so other users with access to your file can't view your tasks. Organizer also lets you show through To Do tasks in Calendar; this lets you see your tasks in your Calendar, and lets you see all your commitments in your Calendar. The To Do section lets you track projects, ideas, and status reports. You can also customize the way To Do works and the way tasks appear.



## Creating a To Do task

1. In the To Do section, double-click the To Do page.

   **Tip** You can also choose Create - Task or press **INS** to create a To Do task, or click the Create task icon.

2. Under Description, enter a description and/or notes about the To Do task.

   For example, "Complete status report for Waller project."

3. Under Date, select a date for your task to start and when you want it due.

   To enter a start date, click the Start box and select a date. To enter a due date, click the Due box and select a date.

4. Click the Categories box to select a category for your To Do task.

   For example, you could create a category called "Waller Project."

   See "Working with categories" in Chapter 13, for information on assigning a category.

5. Under Priority, select the priority for your task: 1, 2, 3, or No priority.

6. (Optional) Select Confidential to make the task confidential, so others who have access to your files can't view this task.

   **Note** Users who have Owner access to your file can see your confidential To Do tasks. See "Sharing files," in Chapter 14 for more information.

7. (Optional) Click Alarm and set an alarm for your To Do task, and/or click Cost to assign a customer and cost code.

   See Chapter 13 for more information on setting an alarm and/or assigning customer and cost codes.

8. To create additional tasks, click Add and repeat steps 2 - 7.

9. When you finish entering all your tasks, click OK.

### Creating an entry in any Organizer section from another section

You can create entries in another section without going to the section where you want to create the entry. Let's say you're in the To Do section and you remember an appointment you must schedule. Choose Create - Entry In - Calendar. Even though you're in the To Do section, the Create Appointment dialog box appears, and you can enter the appointment without leaving the To Do section. See "Creating a Calendar appointment" in Chapter 6, for more information.

## Changing a To Do task

You can change or edit existing tasks directly. Click the task to select it, and click the text you want to edit (the mouse pointer changes to an I-beam). Make your changes and press **F2** to enter your changes.

### For more information

For more information on how to add information to To Do task fields you previously left blank, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Changing, To Do tasks
3. Click Display.

## Sorting your To Do tasks

You can quickly sort To Do tasks by priority, status, start date, or category, by clicking one of the Sort icons in Toolbox.

Sorts the To Do priority page tabs as 1, 2, 3, Unprioritized; A, B, C, Unprioritized; or H, M, L, Unprioritized.

Sorts your To Do status page tabs as Overdue, Current, Future, and Completed.

Sorts your To Do date page tabs by start date: January-December of current year with tabs for years before and after.

Sorts your To Do categories page tabs alphabetically (A-Z). Includes # tab for uncategorized tasks.

The Sort icons change depending on what section you're in, so the view that you pick affects only the To Do section you're in. Click a Sort icon to see how your view of To Do changes. Your selection affects all entries in that section, not just one or two. When you change a view, you're only changing how or what information appears.

## Checking the status of a To Do task

Tasks are color-coded by status. Organizer checks the due date to determine status. If you didn't assign a due date, the task is current. The color assigned to a task tells you the status of the task. You can change the status colors at any time.

1. In the To Do section, choose View - To Do Preferences.
2. Under Status color, click the box for each of the default status colors you want to change, and select the color you want to represent the status of the task you enter.

| *Status* | *Default Color* |
|---|---|
| Overdue | Red |
| Current | Green |
| Future | Blue |
| Completed | Black |

3. Click OK.

### Marking a To Do task completed

When you complete your task, you can mark it completed. A check mark appears next to the task so that you know if it's completed.

1. Double-click the To Do task you want to mark completed.
2. Click the Completed on box and select a date.

   **Tip** You can also click the Completed on box to the left of the To Do task description to mark the task completed with the current date as the completion date.
3. To show completed tasks with strike-through text, select View - To Do Preferences and choose Strikeout.

## Showing To Do tasks in Calendar

You can show entries from the To Do section through to the Calendar. Showing tasks in Calendar can help you see your tasks in the context of your daily work, for example, you can see the tasks you need to do first on a particular day.

1. In the To Do section, choose Section - Show Through.
2. Click the Show into box and select Calendar as the section to show your To Do tasks into.
3. Under From, select To Do.
4. Click Preferences and select the options for how you want shown-through To Do tasks to appear in Calendar.

| *Option* | *Result* |
|---|---|
| Above appointments | Displays entries above appointments (default). |
| Below appointments | Displays entries below appointments. |
| First line only | Displays only the first line of entries from other sections above or below appointments. |

5. Click OK.
6. Click OK.

## Customizing To Do

In the To Do section, you can set various preferences to customize how your tasks appear and what information appears with them. Changing preferences is optional. If you don't change your To Do preferences, Organizer uses default preferences.

### For more information

For more information on customizing To Do preferences, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type To Do section, customizing preferences in
3. Click Display.

## Printing your To Do tasks

Organizer prints tasks in the order you sorted your tasks.

To quickly print a task, drag and drop the task to the Printer icon in Toolbox.

### For more information

For more information on printing your To Do tasks, see Chapter 4 or refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, To Do tasks
3. Click Display.

## Other things you can do

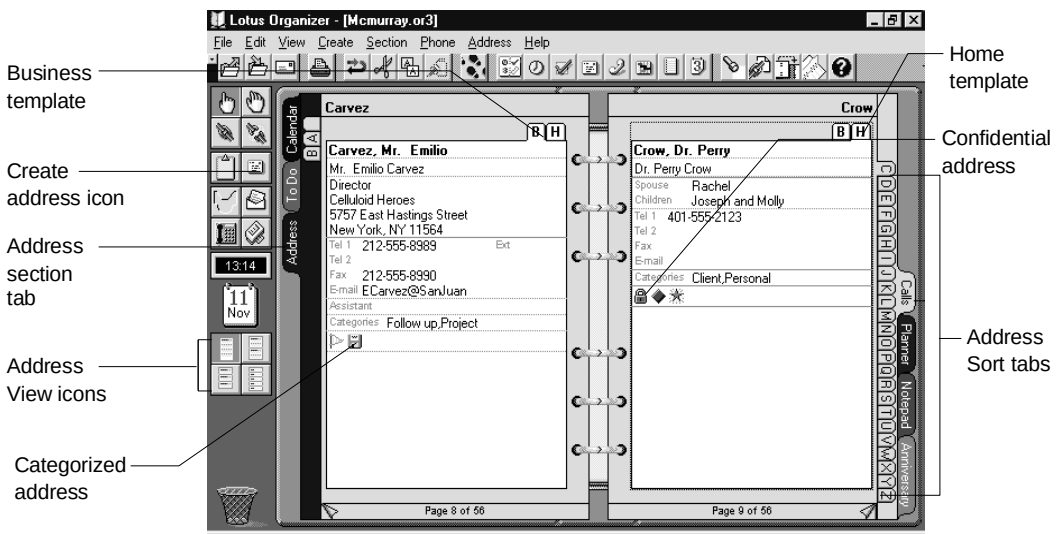
For more information on how to copy, move, and delete To Do tasks, how to set alarms for tasks, create tasks that repeat at intervals you specify, make tasks confidential, create links, assign categories and cost codes, search for information in To Do, and use filters, see Chapter 13.

# Chapter 8
# Working with Names and Addresses

The Address section acts like an address book; however, the Organizer electronic Address section lets you do more. You can sort your addresses either by last name, company, category, or zip code. You can even create a customized address field, such as a field for a car phone telephone number or pager telephone number. In the address section, each address is called an **Address record**.

You can view your Address records in different ways. For example, you can view Address records with all of the information you entered for a record, with just a name and address, and so on.

The Address section also helps you quickly create duplicate Address records for multiple contacts within the same company, without having to copy or re-enter the same company-related information repeatedly.



## Creating an Address record

Organizer provides you with two different address templates that look like address cards with tabs. One tab is for business addresses and the other is for home addresses.

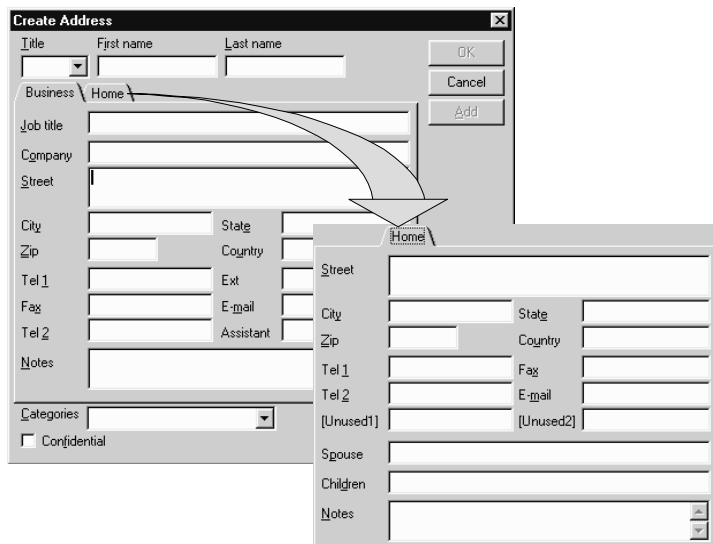
1. In the Address section, double-click the Address page.

   **Tip** You can also choose Create - Address or press **INS** when you're in the Address section to create an Address record.

2. Click the Title box and enter or select a title for the person's name you'll include in the Address record. For example, you can use the title Ms., Mr., Prof., and so on.

3. For First name and Last name, enter the person's name.

4. Click the Business or Home tab to select the type of Address record you want.




   You can determine what tab appears in front automatically. See "Customizing Address," later in this chapter, for more information.

5. Enter the information you want listed in the fields for that business or home Address record.

   **Tip** Press **TAB** to move quickly between options in the Create Address dialog box.

6. (Optional) Click the Categories box and select a category for your address.

   See "Working with categories," in Chapter 13, for more information on assigning categories.

7. (Optional) Select Confidential to make your Address record 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. See "Sharing files," in Chapter 14, for more information.

8. To create additional Address records, click Add and repeat steps 2 - 7.
9. When you finish entering Address records, click OK.

**Creating an entry in any Organizer section from another section**

You can create entries in any section of Organizer without going to the section where you want to create the entry.

Let's say you're in the Address section, and you remember an appointment you must schedule. Choose Create - Entry In - Calendar. Though you're in the Address section, the Create Appointment dialog box appears, and you can enter your appointment without leaving the Address section. See "Creating an Appointment," in Chapter 6, for more information.

## Entering different business associates for the same business address

You can include more than one contact at the same company without re-entering the address information repeatedly. Organizer copies company information from one Address record to another to save you time. If some information in the new Address record differs from the original address, you can change that information.

**Note** This procedure assumes that you've entered at least one other contact's business address from the same company and location.

1. Create the new business Address record.
2. Enter your contact's name and company name.
3. Press **TAB**.

   The Similar Address Found dialog box appears.

4. Under Copy details from, select the company you want.

5. Click OK.

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

   You can change any information in the Address record by editing the field you need to change. To edit an Address record, see "Changing an Address record," later in this chapter.

6. (Optional) To create additional Address records, click Add and repeat steps 2 - 5.
7. When you finish entering Address records, click OK.

## Renaming address fields

You can rename any address field. The changes you make to field names affect all the business or home address fields in the current Address section.

1. Choose View - Address Preferences.
2. Click Fields.

   The Field Labels dialog box appears and lists every assigned field name.

3. Select the field name you want to change by clicking the field name in the Fields box; for example, Tel 1.

   The field name you want to change appears in the Label text box.

4. Under Label, enter the new field name by editing what is there.

   For example, change Tel 1 to Direct line.

5. Click OK.
6. Click OK.

### 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 select a field in the Field list, you'll see in the Label text box that all fields contain an & preceding the label, for example, &Title. The letter that follows the & is the keyboard shortcut. This means that when you press **ALT+T** while you're in an Address record, the cursor will move directly to the Title field.

To assign a keyboard shortcut to a field, type **&** before the letter that will serve as the keyboard shortcut in the Label box. Don't use a letter that's already assigned as a keyboard shortcut in another address field.

## Changing an Address record

You can change or edit existing address text directly. Click the Address record to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

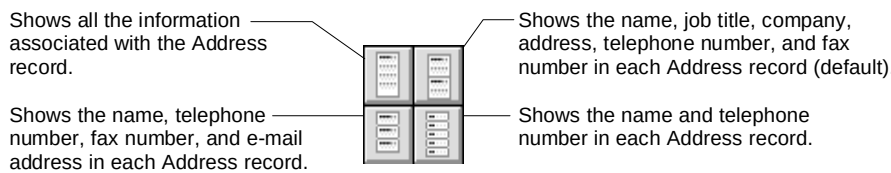
### For more information

For more information on how to add information to Address record fields you previously left blank, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Changing, Address records
3. Click Display.

## Viewing your Address records

You can quickly change how much information you see with each Address record by clicking one of the View icons in Toolbox.




The View icons change depending on what section you're in, so the view that you pick affects only the Address section you're in. Click a View icon to see how your view of Address changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

## Sorting your Address records

You can sort Address records by last name, company, category, or by a particular Address record field. The sorting you select affects the order in which your Address records appear within the Address section. At any time, you can change how you want to sort your Address records.

1. In the Address section, choose View.
2. From the View menu, choose the command you want to sort your 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. |
| By Category | Sorts your Address records alphabetically by category for Address records you already assigned categories for. Page tabs include # for Address records you didn't assign a category to. See "Working with categories," in Chapter 13, for more information on categories. |

## Customizing Address

In the Address section, you can set various preferences to customize how your addresses are sorted and what information appears with them. Changing preferences is optional. If you don't change your Address preferences, Organizer uses default preferences.

### For more information

For more information on customizing address preferences, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Address section, customizing
3. Click Display.

## Printing your Address records

Organizer prints information from your Address section in the order you sorted your Address records.

To quickly print an Address record, drag and drop the Address record to the Printer icon in Toolbox.

### For more information

For more information on printing your Address records, see Chapter 4, or refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, Address records
3. Click Display, select a topic, and click Display again.

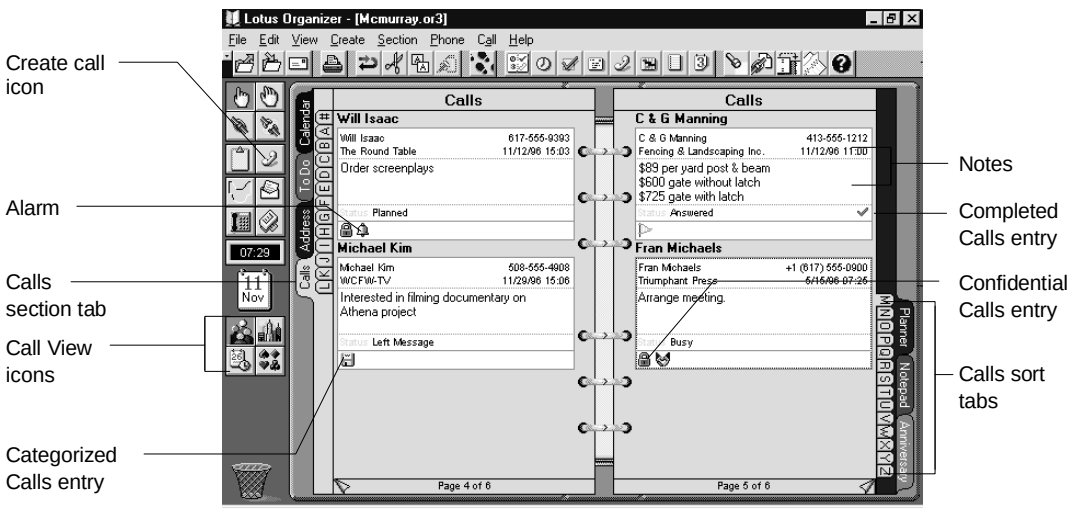
## Other things you can do

For more information on how to copy, move, and delete Address records and how to create links, assign categories, search for information in Address, and use filters, see Chapter 13.

# Chapter 9
# Keeping Track of Phone Calls

The Calls section lets you keep track of phone calls. You can jot down notes on both your incoming and outgoing phone calls, include information on who the call was from or to, keep track of the duration of the call, or set it to automatically track the duration of the call when you answer it. You can also schedule calls you want to make at some future date and set an alarm to remind yourself. You can track the status of follow-up calls, and quickly redial unanswered calls you already made. In the Calls section, each entry you make for a call is called a **Calls entry**.

The Calls section works closely with the Address section. You can access any name, company, and phone number you entered in your Address section. If you installed and connected a modem, you can use Organizer to dial any phone number that appears in your Calls section, Address section, or any other section.

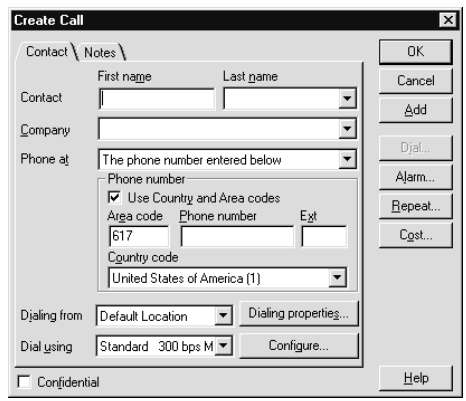


## Creating a Calls entry

1. In the Calls section, double-click the Calls page.

   **Tip** You can also choose Create - Call or press **INS** when you're in the Calls section to create a Calls entry.

2. Enter the contact's first name, last name, and company, or click the boxes and select names you already entered in your Address section.




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

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

   After you select a contact or company name, click the Phone at 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 box uses "The phone number entered below." In this case you must specify a phone number for the Phone number box.

4. Under Phone number, select the options for the phone number you want.

| *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. |

*Continued*

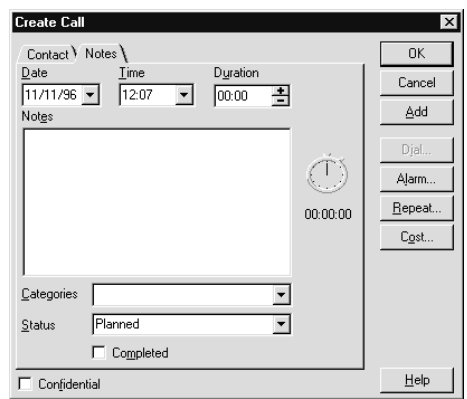
| *Option* | *Result* |
|---|---|
| Ext | Lets you specify the extension number of the telephone number you want to call. |
| Country code | Lets you select a specific country code for a Calls entry. If you don't specify a county code, Organizer uses the country specified in the current Dialing from location. See "Dialing a phone number from Organizer," later in this chapter, for more information. |

**Note** If you select a contact name and/or company, the area code, phone number, and extension are automatically filled in from information you supplied in the Address record.

**5.** (Optional) Click Alarm to set an alarm for your Calls entry, click Repeat to make a Calls entry repeat at intervals you specify, and/or click Cost to assign a customer and cost code.

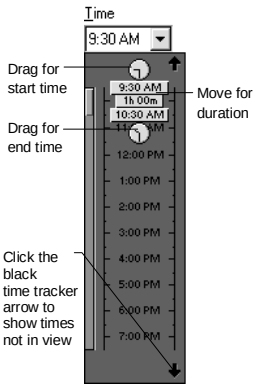
See Chapter 13 for more information on setting an alarm, creating repeat intervals, and/or assigning customer and cost codes.

**6.** Click the Notes tab.




**7.** Click the Date box and select the date for the Calls entry.

**8.** Click the Time box and select the time for the Calls entry (with time tracker) or enter the time.




With time tracker, you can perform any of the tasks below.

| *To* | *Do this* |
|---|---|
| Change the start time of a Calls entry | Drag the top clock on time tracker up or down. You can also press ↑ or ↓. |
| Change the duration of a Calls entry | Drag the bottom clock on time tracker up or down. You can also press **CONTROL** ↑ or ↓ . Organizer automatically adjusts the Duration field when you use time tracker. |
| Move the entire Calls entry to another time slot that day | Drag time tracker using the duration time (the bar that appears in the center). You can also press and hold **SHIFT** while you press ↑ or ↓. |
| Show times that aren't currently in view | Click the black time tracker arrows at the top or bottom of the box. |

If necessary, for Duration, specify the duration of the Calls entry by clicking the + (plus) to increase or - (minus) to decrease the time of the call.

**9.** Under Notes, enter a description of the Calls entry.

**10.** (Optional) Click the stopwatch to start tracking the duration of the call. Click the stopwatch again to stop timing the call.

**11.** Click the Categories box and select a category for the call.

See "Working with categories," in Chapter 13, for more information.

**12.** If necessary, click the Status box and select a status from the list that appears.

See "Assigning the status for a Calls entry," later in this chapter, for more information.

**13.** Select the options you want.

| *Option* | *Result* |
|---|---|
| Completed | Marks or doesn't mark (default) your Calls entry completed. For more information on completing a call, see "Marking a Calls entry completed," later in this chapter. |
| 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. See "Sharing files," in Chapter 14, for more information. |

**14.** (Optional) To create additional Calls entries, click Add and repeat steps 2-13.

**15.** When you finish entering all your Calls entries, click OK.

### Creating an entry in any Organizer section from another section

You can create entries in any section of Organizer without going to the section where you want to create the entry.

Let's say you're in the Calls section, and you want to add an Address record to your Address section for the person you're calling. Choose Create - Entry In - Address. Though you're in the Calendar section, the Create Address dialog box appears, and you can enter your address information without leaving the Calls section. See "Creating an Address record," in Chapter 8, for more information.

### For more information

If you answer an unexpected phone call, you can create a Calls entry for it, quickly. For more information on quickly creating a Calls entry for an incoming call, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Incoming calls, creating Calls entry for
3. Click Display.

---

## Dialing a phone number from Organizer

Organizer can dial telephone numbers that appear in any Calls entry. Organizer can also quickly dial any phone number that appears with an entry in your To Do, Address, Calls, or any other section.

You must be connected to and use a modem to dial phone numbers from Organizer.

### For more information

For more information on dialing a telephone number and dialing a telephone number quickly, selecting a location to dial from, and configuring your dialing device, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Dialing, changing dialing from location

   Dialing, configuring your modem

   Dialing, phone numbers

   Dialing, phone numbers quickly
3. Select the index entry you want, then click Display.

### Clocking a phone call


You can clock how much time you spend during a phone call. Choose Create - Call, click the Notes tab, and 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.

### Assigning the status for a Calls entry

You can change the status for any Calls entry at any time. The status you select helps you identify the result of the phone call. For example, if you select Busy or No answer, you'll know to try the call again.

1. In the Calls section, double-click the Calls entry for which you want to assign the status.
2. Click the Notes tab.
3. Click the Status box and select a status from the list that appears: Planned, Try later, Answered, Incoming, Left message, Calling back, No answer, Follow up, or Busy.
4. Click OK.

   Organizer displays the status you assigned in the status field of the Calls entry in your Calls section.

## Recording a follow-up phone call

When you record a follow-up Calls entry, by default, Organizer automatically links the follow-up Calls entry to the original Calls entry you made.

### For more information

For more information on how to record a follow-up call, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Follow-up calls
3. Click Display.

## Changing a Calls entry

You can change or edit existing Calls entry text directly. Click the Calls entry to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

### For more information

For more information on how to add information to Calls entry fields you previously left blank, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Changing, Calls entries
3. Click Display.

### Marking a Calls entry completed

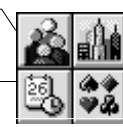
When you complete your Calls entry, you can mark the call completed. A check mark appears in the Calls entry so that you know it's been closed.

1. Go to the Calls entry you want to mark completed and select it.
2. Choose Call - Completed.

Organizer displays the Calls entry with a green check mark.

## Viewing and sorting your Calls entries

You can quickly sort your Calls entries by clicking one of the View icons in Toolbox. When you change the view, you change the sort order.



Sorts and displays Call entries by date and time.

Sorts and displays Call entries by last name (default).

Sorts and displays Call entries by company name.

Sorts and displays Call entries by category if you already assigned categories to your Calls entries. Includes # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @ or numbers like 01890. See "Working with categories," in Chapter 13, for more information.

The View icons change depending on what section you're in, so the view that you pick affects only the Calls section you're in. Click a View icon to see how your view of the Calls section changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

## Showing Calls entries in Calendar

You can show entries from the Calls section in the Calendar section so that you can see your commitments in the context of your daily work.

See Chapter 4 for more information on printing shown-through items in Calendar.

1. In the Calls section, choose Section - Show Through.
2. Click the Show into box and select Calendar.
3. Under From, select Calls.
4. Click Preferences and select the options for how you want shown-through Calls entries to appear in Calendar.

| *Option* | *Result* |
|---|---|
| Above appointments | Displays entries above appointments (default). |
| Below appointments | Displays entries below appointments. |
| First line only | Displays only the first line of entries from other sections above or below appointments. |

5. Click OK.
6. Click OK.

## Customizing Calls

In the Calls section, you can set various preferences to customize how your Calls entries appear, and what information appears with them. Changing preferences is optional. If you don't change your Calls preferences, Organizer uses default preferences.

### For more information

For more information on customizing Calls preferences, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Calls section, customizing preferences in
3. Click Display.

### Changing telephone dialing preferences

Telephone dialing preferences determine the device, such as a modem, as well as 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.

### For more information

For more information on changing telephone dialing preferences, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Telephone dialing, changing preferences in
3. Click Display.

## Printing Calls entries

Organizer prints Calls entries in the order you sorted them. To quickly print a Calls entry, drag and drop the Calls entry to the Printer icon in Toolbox.

### For more information

For more information on printing your Calls entries, see Chapter 4, or refer to Help (online documentation).

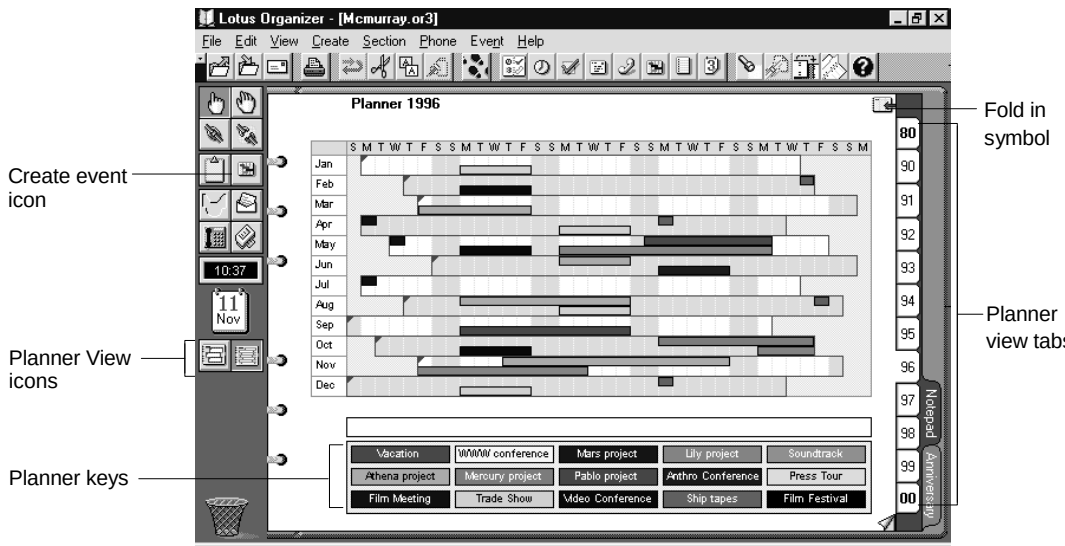
1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, Calls entries
3. Click Display.

## Other things you can do

For more information on how to copy, move, and delete Calls entries, and how to set alarms for Calls entries, create Calls entries that repeat at intervals you specify, create links, assign categories and cost codes, search for information in Calls, and use filters, see Chapter 13.

# Chapter 10
# Charting Events in Planner

The Planner section helps you see what lies ahead as you manage your long-term schedule. Entries you create in Planner are called **Planner events**. With Planner, you designate blocks of time for particular activities, such as vacations, training sessions, and conferences. You can view events by year or by quarter, and you can specify that your events show through in the Calendar section so that you can see events in the context of your daily work.



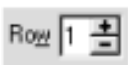
## Creating a Planner event

You can create Planner events in two ways: through the Create Event dialog box or with the pen tip (mouse pointer). If you enter many events at once but you don't need to fill in details right away, you'd probably prefer the pen tip. See "Entering an event with the pen tip," later in this chapter. If you'll be filling in the details when you create the event, use the procedure below.

1. In the Planner section, double-click the Planner page.

   **Tip** You can also choose Create - Event or press **INS** when you're in the Planner section, or click the Create Event icon.

2. Click the Event type box and select an event type.
3. For Row, click + (plus) to increase or - (minus) to decrease the row number: 1-4 for the Year per page view and 1-8 in the Quarter per page view.




   **Tip** If you don't select a row, your first entry goes into row 1 by default. See "Displaying overlapping events," later in this chapter, for more information.

4. Under Notes, enter a description of the event.
5. Click the From and Until boxes to select the start and end date of the event, or enter dates for them.

   You can enter an end date for any event and Organizer automatically adjusts the number of days for the event. If you enter a specific number of days, Organizer automatically adjusts the end date.

   Click the Days + (plus) to increase or - (minus) to decrease the duration of the event.

6. Click the Categories box to select a category for your event.

   See "Working with categories," in Chapter 13, for more information.

7. (Optional) Click Confidential to make the event confidential, so others who have access to your files can't view it.

   See "Sharing files," in Chapter 14, for more information.

8. Click Alarm to set an alarm for your event, click Repeat to make an event repeat at intervals you specify, and/or click Cost to assign a customer and cost code.

   See Chapter 13 for more information on setting an alarm, creating repeating intervals, and/or assigning customer and cost codes.

9. To create additional Planner events, click Add and repeat steps 2 - 8.
10. When you finish entering all your Planner events, click OK.

### Creating an entry in any Organizer section from another section

You can create entries in another section without going to the section where you want to create the entry. Let's say you're in the Planner section and you remember an appointment you must schedule. Choose Create - Entry In - Calendar. Though you're in the Planner section, the Create Appointment dialog box appears, and you can enter the appointment without leaving the Planner section. See "Creating a Calendar appointment," in Chapter 6, for more information.

## Entering an event with the pen tip

You can quickly enter Planner events with the pen tip. Event types, such as Vacation, Training, and Conference, have color-coded Planner keys which you can see beneath the Planner chart. You select a Planner key, then enter events for that type on the Planner chart.

1. Click an event type from the color-coded Planner keys beneath the Planner chart.

   For information on customizing Planner keys, see "Changing Planner Keys," below.

2. Move the mouse pointer to the Planner chart.

   Notice the mouse pointer changes to look like the tip of a pen.

3. Do one of the following:

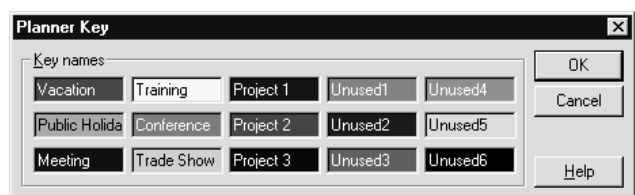
   - To enter an event for a single day, click a day on the Planner chart to start the event.
   - To enter an event over several days, drag the pen tip over those days in the Planner chart.

## Changing Planner keys

Planner keys help you color code your Planner events. These color-coded Planner keys represent event types. You can customize the names of events by changing the key names. Planner keys appear beneath the Planner chart.

1. Double-click a Planner key you want to change.

   For example, "Unused1."




   A blinking cursor appears in the Planner key you want to change.

2. Press **DEL** until the current key name is removed and enter a new key name.
3. Click OK.

## Displaying overlapping events

Planner days are divided into 4 rows in Year per page view and 8 rows in Quarter per page view. All rows of an event you create in Quarter per page view will appear in Year per page view. However, if you create rows in the Year per page view then switch to the Quarter per page view, Organizer combines two rows into a single row in Quarter per page view.

If you chart Planner events on top of each other or create more events than the Planner chart has rows to display, Planner displays cross hatching in a color block to indicate that there's an event you can't see.


Cross-hatching indicates events that overlap

## Changing a Planner event

You can change or edit existing Planner events directly on the Planner chart with the pen tip. Place the mouse pointer on the event in the Planner chart; when the mouse pointer changes to a double arrow, press and hold the mouse button and drag the arrow left or right to increase or decrease the duration of the event.

To move an event, keeping the same duration, click the event, then drag and drop it to the desired date.

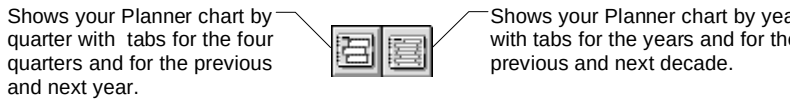
### For more information

For more information on how to add information to a Planner event you previously left blank, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Events, changing Planner events
3. Click Display.

## Viewing Planner events

You can quickly display Planner events by quarter or by year by clicking one of the View icons in Toolbox.




The View icons change depending on what section you're in, so the view that you pick affects only the Planner section you're in. Click a View icon to see how your view of Planner changes. Your selection affects all entries in that section, not just one or two. When you change a view, you're only changing how or what information appears.

## Showing Planner events in Calendar

You can show entries from the Planner section in the Calendar section so that you can see your commitments in the context of your daily work.

1. In the Planner section, choose Section - Show Through.
2. Click the Show into box and select Calendar as the section to show your Planner events in.
3. Under From, select Planner.
4. Click Preferences and select the options for how you want shown-through events to appear in Calendar.

| *Option* | *Result* |
|---|---|
| Above appointments | Displays entries above appointments (default). |
| Below appointments | Displays entries below appointments. |
| First line only | Displays only the first line of entries from other sections above or below appointments. |

5. Click OK.
6. Click OK.

## Showing Calendar appointments 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 your Planner chart.

To help you quickly identify Calendar information in Planner, you can color code the Calendar information (the color 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.

1. In the Calendar section, choose Section - Show Through.
2. Click the Show into box and select Planner as the section to show your Calendar appointments in.
3. Under From, select Calendar.
4. Click Preferences.
5. Click the Shown through appointment color box and select a color.
6. Click OK.
7. Click OK.

## Customizing Planner

In the Planner section, you can set various preferences to customize how your events appear and what information appears with them. Changing preferences is optional. If you don't change your Planner preferences, Organizer uses default preferences.

### For more information

For more information on customizing Planner events, refer to Help (online documentation).

1. Choose Help - Help Topics and click the Index tab.
2. Type Planner section, customizing preferences in
3. Click Display.

## Printing your Planner events

Organizer prints events in chronological order during the range you specify.

To quickly print an event, drag and drop the event to the Printer icon in Toolbox.

### For more information

For more information on printing your Planner event, see Chapter 4, earlier in this book, or refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, Planner events
3. Click Display.

## Other things you can do

For more information on how to copy, move, and delete Planner events, and how to set alarms for events, create events that repeat at intervals you specify, make events confidential, assign categories and cost codes, search for information in Planner, and use filters, see Chapter 13.

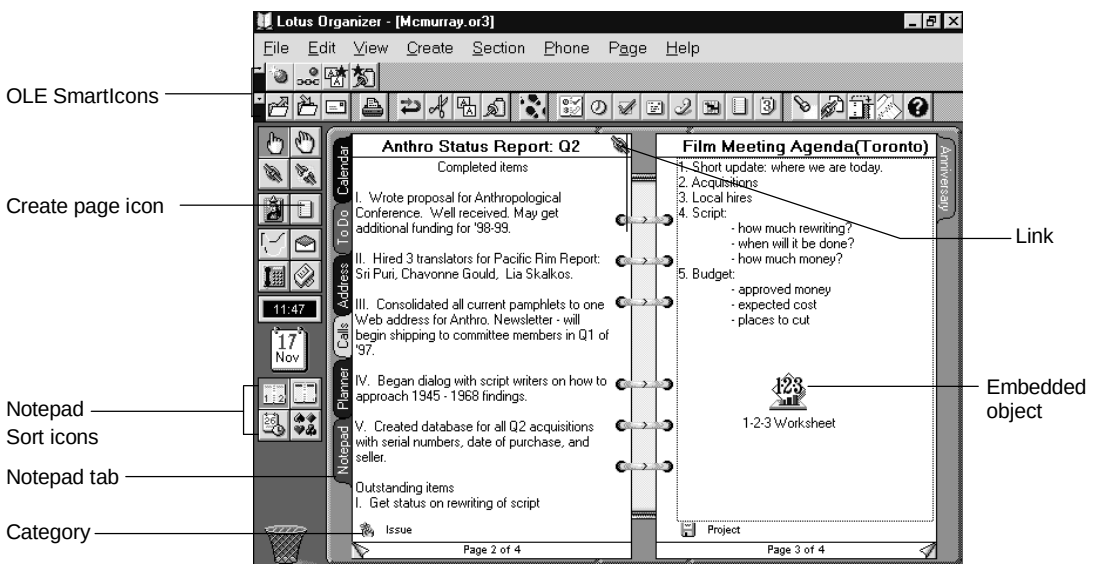
# Chapter 11
# Centralizing Information in Notepad

The Notepad section helps you organize information in the form of notes, lists, memos, spreadsheets, sales charts, diagrams, organizational charts, maps, and logos.

Entries you create in Notepad are called **Notepad pages**. A Notepad page holds information that you either enter in Organizer, or embed or link from other applications.

If you embed an object — such as a spreadsheet, word processing document, or presentation — its information can be viewed and edited from Notepad. If you also specify that the information is linked to its original file, the information is automatically updated whenever you make changes to the original file.

You can sort the information in Notepad by color coding pages, by assigning categories and cost codes to pages, and by specifying how pages are listed on the Contents page. You can specify that the Notepad Contents page list pages by their titles, page numbers, categories, or date.



## Creating a Notepad page

1. In the Notepad section, double-click the Notepad page.

   **Tip** You can also choose Create - Page or press **INS** when you're in Notepad to create a Notepad entry.

2. Under Title, enter a page title.

   For example, "Waller Project Status Report."

   This field is optional; however, it's a good idea to title your entry because Notepad can list pages by their titles on the Contents page.

3. Under Page number, select Automatic (default) or Manual and enter a page number to override automatic page numbering.

4. Under Style, select the appropriate options.

| *Option* | *Result* |
|---|---|
| Start a chapter | Establishes a chapter beginning with this page. |
| Links page | Lets you link pages within and across Organizer sections that contain related information. |
| 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. |

5. (Optional) Click the Categories box and select a category for your Notepad page.

   See "Working with categories," in Chapter 13, for more information on assigning categories.

6. (Optional) Select Confidential to make the page confidential, so others who have access to your files can't view it.

   See "Sharing files," in Chapter 14, for more information.

7. To create additional Notepad pages, click Add and repeat steps 2 - 6.

8. When you finish entering all your Notepad pages, click OK.

### To add text to a page

After you've entered a title for your Notepad page, and completed any other steps above, you can add text to your page. Position your mouse pointer on a Notepad page and click. The I-beam appears. Begin entering (or typing) the text you want on that page.

### Creating an entry in any Organizer section from another section

When you use Create - Entry In, you can create entries in another section of Organizer without needing to go to the section where you want the entry.

Let's say you're in the Notepad section and you remember you need to make an appointment in your Calendar section. Choose Create - Entry In - Calendar. Although you're in the Notepad section, the Create Appointment dialog box appears and you can enter the appointment without leaving Notepad.

---

## Changing text settings

You can customize your Notepad text by selecting different fonts and attributes. You can make selections that affect entire Notepad pages of text or only individual letters of a single word.

### 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 finish 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.

### Changing text fonts

1. Go to the Notepad page you've created.
2. Select the text you want to change by highlighting it.
3. Choose Text - Font.
4. Select the fonts and attributes you want.

   Click the Font, Font style, and Size boxes and choose from the fonts, font styles, and font sizes shown.
5. Under Effects, select Strikeout to draw a line through text or Underline to underline text.
6. Click the Color box to select the color for the text you selected.
7. Click OK.

## Changing text alignment

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 option.

| *Option* | *Results* |
|---|---|
| Left | Selected text appears aligned along the left margin of the Notepad page. |
| Right | Selected text appears aligned along the right margin of the Notepad page. |
| Center | Selected text appears centered on the Notepad page. |

5. Click OK.

## Indenting paragraphs

You can indent any paragraph on a Notepad page so that it appears exactly where you want it to appear.

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.

| *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.

5. Click OK.

## For more information

For more information on changing the appearance of text on your Notepad pages, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Notepad section and then select the index selection you want.
3. Click Display.

## Sharing data using OLE

Object Linking and Embedding (OLE) lets you share data across applications. Depending on the task, you either create a link or embed the data.

### Understanding when to use linked objects

A link is a channel through which data stored in a source file is displayed in a destination file. When you update linked data in a destination file, the latest data from the source file is displayed.

**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 data changes.

For example, let's say you want to use information from a Lotus 1-2-3® spreadsheet and see it in your Notepad section, and the 1-2-3 spreadsheet information changes weekly. You can create automatic links in the Notepad page to the data in the 1-2-3 spreadsheet. Now, whenever you open your Notepad section, the spreadsheet automatically displays the latest updates.

**Don't use linked objects** when any one of the following circumstances is true:

- You use the data in only one application.
- You don't expect the data to change.
- You don't need to update the shared data when the original data 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 wouldn't use a linked object because it is unlikely the logo will change. Instead, you can copy the logo in Lotus Freelance Graphics and paste it on your Notepad page.

## Understanding when to use embedded objects

An embedded object consists of an object created using one application, but stored in a file created using another application (sometimes called the container application).

**Use embedded objects** when both of the following circumstances are true:

- You use the data only in one application.
- You expect to edit or update the information.

For example, let's say you have a Word Pro™ document that highlights marketing information. You can embed the Word Pro document on a Notepad page. Whenever you want information from the Word Pro document, just double-click the Word Pro icon on the Notepad page to open the Word Pro file.

## Embedding a file as an OLE object on a Notepad page

1. Select the Notepad page on which you want to embed a file.
2. Click the page to place the insertion pointer on the page.

3. Choose Create - Object.
4. Select Create an object from a file.
5. For File, enter the path and file name of the file you want to embed.

   You can enter the path and file name in the File box or click Browse to locate the file you want to use.
6. (Optional) To also create a link to the file, select Link to file.
7. Select the Display as icon option to display an icon to represent the contents of the embedded object.

   If you don't select this option, Organizer inserts a picture of the file's contents in the Notepad page.
8. Click OK.

## Managing links

When you create a linked OLE object, Organizer automatically updates the information on your Notepad page when you start Organizer. You can also manually update the information.

1. Select the object you want to edit.

2. Choose Edit - OLE Links.
3. In the link box, select the link you want to update.

4. For Update, select Manual to change how the link will be updated.
5. To update the linked information now, click Update Now.
6. Click Done.

### For more information

For more information on creating and editing OLE and linked objects and on managing links, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Objects and then select the index selection you want.
3. Click Display.

## Using the Contents page of your Notepad pages

You use the Contents page to view a listing of your Notepad pages. You can choose to have the pages listed by page number, page title, date, or category. You can also double-click a page in the listing to go to that page in your Notepad. Notepad automatically creates the Contents page and updates it as you add pages.

### Viewing the Contents page differently

1. Click the Notepad tab to view the Contents page.
2. (Optional) To change the order in which the pages are listed, choose View.
3. Choose one of the following commands.

| *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. |

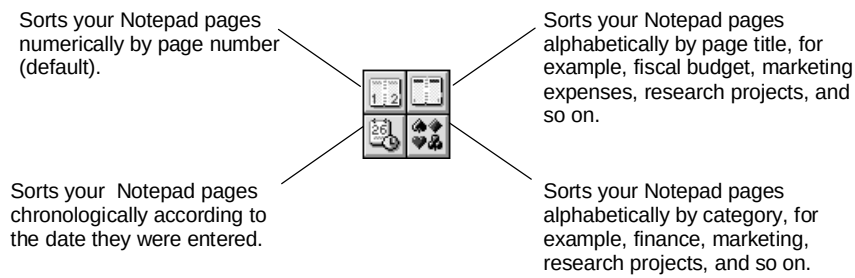
### Using the Contents page to move a Notepad page

1. Click the Notepad tab to display the Contents page.
2. Choose View - By Page Number.
3. Click the title of the page you want to move.
4. Drag and drop the page in its new location in the listing on the Contents page.

   **Tip** You can also select the page then choose Edit - Cut, click where you want to place the page, then choose Edit - Paste.

## Sorting your Notepad pages using the Sort icons

You can quickly change how the Contents page sorts your Notepad pages by clicking one of the sort icons in Toolbox.




These icons change depending on what section you're in, so the view that you pick affects only the Contents page in the Notepad section. Click an icon to see how your view of the Contents page changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

## Customizing Notepad

In the Notepad section, you can set various preferences to customize how your Notepad pages appear and what information appears with them. Changing preferences is optional. If you don't change your Notepad preferences, Organizer uses default preferences.

### For more information

For more information on customizing Notepad preferences, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Notepad section, customizing preferences in
3. Click Display.

## Printing your Notepad pages

You can print the current page or a range of pages in your Notepad section.

### For more information

For more information on printing your Notepad pages, see Chapter 4, or refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, Notepad pages
3. Click Display.

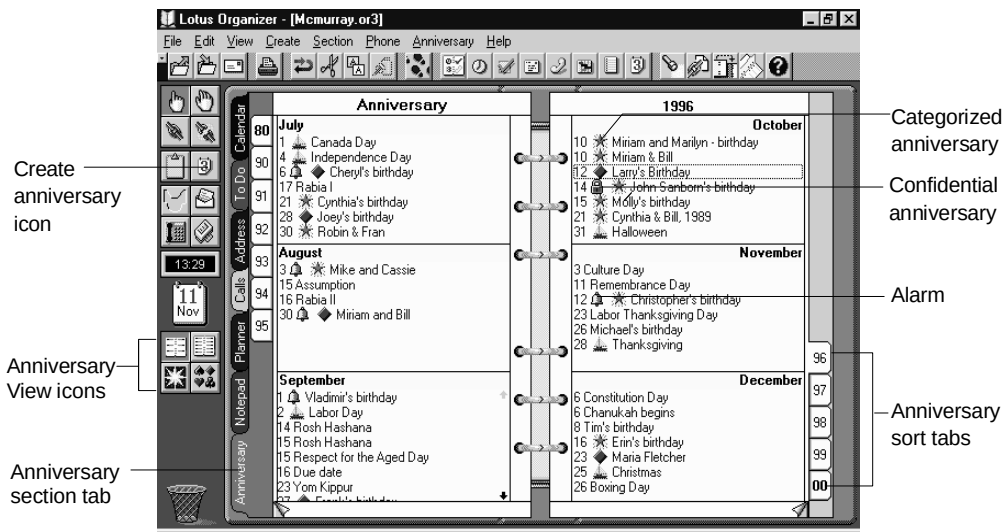
## Other things you can do

For more information on how to copy, move, and delete Notepad pages, create links, assign categories and cost codes, and search for information in Notepad, see Chapter 13.

# Chapter 12
# Remembering Anniversaries and Other Special Dates

The Anniversary section lets you keep a list of all the important dates you need to remember every year. You can include anniversaries, birthdays, wedding dates, or special days (for example, pay days) you want to be reminded of. You can enter as many anniversaries as you like. Entries you create in the Anniversary section are called **Anniversary entries**.

You can specify that an anniversary you enter is automatically carried forward every year; you can sort and view your anniversaries by year, month, category, or zodiac sign; and you can set an alarm for an anniversary to remind you when the anniversary date is current. Organizer also lets you show through your anniversaries in your Calendar section, so you can see the anniversaries in the context of your daily work.



## Creating an Anniversary entry

1. In the Anniversary section, double-click the Anniversary page.

   **Tip** You can also choose Create - Anniversary or press **INS** when you're in the Anniversary section to create an Anniversary entry.

2. Under Description, enter a description of the anniversary.
3. Click the Date box and select the date for the anniversary.
4. (Optional) Click the Categories box and select a category for your anniversary.

   See "Working with categories," in Chapter 13, for more information.

5. Select the options you want.

| *Option* | *Result* |
|---|---|
| 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 created it. |
| Confidential | Makes or doesn't make (default) the anniversary 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. See "Sharing files," in Chapter 14, for more information. |

6. (Optional) Click Alarm to set an alarm for your anniversary, click Repeat to make an anniversary repeat at intervals you specify, and/or click Cost to assign a customer and cost code.

   See Chapter 13 for more information on setting an alarm, creating repeating intervals, and/or assigning customer and cost codes.

7. To create additional anniversaries, click Add and repeat steps 2 - 6.
8. When you finish entering all your anniversaries, click OK.

### Creating an entry in any Organizer section from another section

You can create entries in any section of Organizer without going to the section where you want to create the entry.

Let's say you're in the Anniversary section, and you remember an appointment you need to make. Choose Create - Entry In - Calendar. Though you're in the Anniversary section, the Create Appointment dialog box appears, and you can enter your appointment information without leaving the Anniversary section. See "Creating a Calendar appointment," in Chapter 6, for more information.

## Changing an Anniversary entry

I

You can change or edit an Anniversary directly to change the description of the anniversary. Click the Anniversary entry to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

### For more information

For more information on how to add information to Anniversary entry fields you previously left blank, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Changing, anniversaries
3. Click Display.

## Viewing and sorting your anniversaries

You can quickly change how your anniversaries are sorted and what information appears by clicking one of the Anniversary View icons in Toolbox. When you change the view, you change the sort order.

Sorts anniversaries by month (default). Displays a view of 6 months over 2 pages with year tabs.

Sorts anniversaries by zodiac sign. Displays tabs with zodiac signs.

Sorts anniversaries by year. Displays a view of 12 months over 2 pages with year tabs.

Sorts anniversaries by category if you already assigned categories to your Anniversary entries. See "Working with categories," in Chapter 13, for more information. Displays alphabetical letter tabs, and includes # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @ or numbers like 01890.

The View icons change depending on what section you're in, so the view that you pick affects only the Anniversary section you're in. Click a View icon to see how your view of Anniversary changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

## Showing anniversaries in Calendar

You can show entries from the Anniversary section in the Calendar section. Showing anniversaries in Calendar can help you see your special dates in the context of your daily work.

See Chapter 4 for more information on printing shown-through entries in Calendar.

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

2. Click the Show into box and select Calendar.
3. Under From, select Anniversary.
4. Click Preferences and select the options for how you want shown-through anniversaries to appear in Calendar.

| *Option* | *Result* |
|---|---|
| Above appointments | Displays entries above appointments (default). |
| Below appointments | Displays entries below appointments. |
| First line only | Displays only the first line of entries from other sections above or below appointments. |

5. Click OK.
6. Click OK.

## Customizing Anniversary

In the Anniversary section, you can set various preferences to customize 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 default preferences.

### For more information

For more information on customizing preferences in Anniversary, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Anniversary section, customizing preferences in
3. Click Display.

## Printing anniversaries and other special dates

Organizer prints anniversaries in the order you sorted them.

To quickly print an Anniversary entry, drag and drop the Anniversary entry to the Printer icon in Toolbox.

### For more information

For more information on printing your Anniversary entries, see Chapter 4, or refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Printing, anniversaries
3. Click Display.

## Other things you can do

For more information on how to copy, move, and delete Anniversary entries, and how to set alarms for anniversaries, create Anniversary entries that repeat at intervals you specify, create links, assign categories and cost codes, search for information in Anniversary, and use filters, see Chapter 13.

# Chapter 13
# Putting It All Together

Now that you're familiar with some of the key features available in each Organizer section, you can try some features that are available across all or many Organizer sections, between Organizer files, and between Organizer and other applications. By the end of this chapter, you'll see why Organizer is such a powerful, integrated productivity tool.

## Copying Organizer information

You can copy and paste Organizer information between Organizer sections and with other applications. You copy and paste information in conjunction using Organizer Clipboard in Toolbox or Windows Clipboard. When you copy information, your newly copied information writes over anything that is currently on Clipboard, and you must paste this information to see it in its new destination.

**Note** When you copy information to Organizer Clipboard, notice that what appears on Clipboard is relevant to the kind of information you're copying to it.

| *Type of copied information* | *Clipboard icon with copied entry* | *Type of copied information* | *Clipboard icon with copied entry* |
|---|---|---|---|
| Calendar appointment |  | Anniversary entry |  |
| To do task |  | Text |  |
| Address record |  | Metafile |  |
| Calls entry |  | Bitmap |  |
| Planner event |  | Mixed entry (multiple entries) |  |
| Notepad page |  | | |

**Note** An empty Clipboard looks like this: 

## Quickly copying entries between different Organizer sections

You can use Clipboard in the Organizer Toolbox to quickly copy an entire Organizer entry or multiple entries. The entry or entries can contain text, links, a metafile, or a bitmap.

1. You can copy one or more entries in the following ways:
   - If you're copying one entry, click the entry you want to copy to select it.
   - If you're copying one or more entries that are in sequence, select the first entry you want to copy, press and hold **SHIFT**, and click the last entry.
   - If you're copying two or more entries that aren't in sequence, select the first entry you want to copy, press and hold **CTRL**, and click each entry.

2. Drag and drop the entry or entries to the clipboard in Toolbox.
3. Go to the page on which you want to paste the information.
4. Drag the contents on Clipboard by clicking the Clipboard icon and dragging and then dropping the information where you want to paste it.

### Using Windows Clipboard to copy entries


You can also use Windows Clipboard to copy and paste entries between sections. Select the entry you want to copy and choose Edit - Copy, or press **CTRL+C**. Then go to the page on which you want to paste the entry and choose Edit - Paste or press **CTRL+V** to paste the entry from Clipboard. You can also press and hold **CTRL** as you drag and drop the entry to the section tab of the section you want to copy to.

## Copying text between Organizer sections and other applications

You can copy selected text from any Organizer entry to Clipboard, and paste the text either to another Organizer entry or to another application.

1. Click the entry you want to copy to select it.

   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 blinking vertical cursor.

3. Select the text you want to copy by pressing and holding the left mouse button while you highlight the text.

4. Choose Edit - Copy.

   **Tip** You can also press **CTRL+C** or you can drag and drop your selection to Clipboard icon in Toolbox to copy text you selected.

5. Do one of the following:

   - If you're copying text from to another Organizer entry, click an Organizer entry to select it.

   I The pointer changes to the I-beam.

   - If you're copying information to another application, switch to the application where you want your copied text to appear.

   **Tip** To switch between Organizer and any open Windows application, press **ALT+TAB**.

6. Click where you want to paste the text.

7. Choose Edit - Paste.

   **Tip** You can also press **CTRL+V** to paste previously copied text.

To copy information from another application to Organizer, copy the text in the application and paste it to an Organizer entry, by reversing this procedure.

## Using Edit - Copy Special to copy Organizer field information

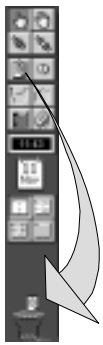
You can copy specific Organizer field information from any Organizer entry to another Organizer section or to another application. In many cases, the fields you can select are combined into a useful format. The fields you can copy also depend on the type of entry you select.

## For more information

For more information on how to use Edit - Copy Special to copy Organizer field information, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Copy Special
3. Click Display.

### Deleting the contents of Clipboard



You can delete Clipboard contents at any time. Deleting Clipboard contents means that any information you copied to Clipboard is cleared from Clipboard.

**Caution** You cannot retrieve, nor use Undo to retrieve, deleted Clipboard contents.

To delete the contents of Clipboard, drag and drop Clipboard to Trash in Toolbox.

## Moving Organizer information to a new location

You can move an entry to another area, another page, or another section.

If you're moving an entry that repeats, you can select whether to change any of the other repeating entries, too. For more information on the effects of moving repeating entries, see "Creating an entry to repeat at intervals you select," later in this chapter.

1. Go to the entry you want to move.
2. Click the Pick up icon in Toolbox.
3. Select the entry you want to move by clicking it.

   A symbol representing the type of entry you're moving appears in the hand when it picks up the entry.

| *Type of information* | *Symbol* | *Type of Information* | *Symbol* |
|---|---|---|---|
| Calendar appointment | | Planner event | |
| To Do task | | Notepad page | |
| Address record | | Anniversary entry | |
| Calls entry | | | |

4. Click where you want the information moved: another area, another page, another section, and so on.

**Tip** You can also move an entry to another area, page, or section by dragging and dropping the entry to the new location.

You can also select the entry you want to move, choose Edit - Cut, go to the new area, and then choose Edit - Paste.

## Deleting Organizer information

You can delete a single entry or many entries at one time.

If you deleted an entry or entries by mistake, you can retrieve the deleted entry or entries by choosing Edit - Undo. You can undo only the last action you performed.

1. You can delete one or more entries in the following ways:
   - If you're deleting one entry, click the entry you want to delete.
   - If you're deleting two or more entries that are in sequence, select the first entry you want to delete, press and hold **SHIFT**, and click the last entry.
   - If you're deleting two or more entries that aren't in sequence, select the first entry you want to delete, press and hold **CTRL**, and click each entry.

2. Drag and drop the entry or entries to Trash in Toolbox.

**Tip** You can also delete an appointment by selecting it and then pressing **DEL**, choosing Edit - Cut, or pressing **CTRL**+**X**.

## Setting an alarm for an entry

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!"

1. Create or edit an entry.

   See Chapters 6 - 12 for information on creating and editing entries in a specific Organizer section.

2. Click Alarm.
3. Click the Date box and select the date you want your alarm to go off.
4. Click the Time box and select the time you want your alarm to go off.

   You can 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 number of minutes. Then select Before or After to indicate when you want the alarm to go off (before the entry or after the entry is scheduled).

5. Click the Tune box and select the tune you want.

   The default tune is the sound of an alarm clock. You can hear each tune by selecting a tune and then clicking Play.

6. For Message, enter the message you want to appear.

   For example, “Meeting with David; bring new tapes for demo!”

7. For Start, enter the application you want to start or file you want to open, when the alarm goes off.

   If necessary, click Browse for a listing of your files and applications to choose from.

8. (Optional) If you don’t want the alarm to display, click the Display alarm option to deselect it.

9. Click OK.

10. Click OK.

**Tip** You can recognize entries which you set alarms for by displaying the alarm symbol next to entries (except Planner events) in your Organizer section. If you haven’t set your Organizer section to show the alarm symbol next to your Organizer entries, choose one of the following commands, depending on what section you’re in: View - Calendar Preferences, View - To Do Preferences, View - Calls Preferences, or View - Anniversary Preferences. Under Options, select the alarm symbol, and click OK.

## Responding to an alarm

When your alarm goes off, the Alarm dialog box appears, unless you deselect the Display alarm option when you set the alarm.

1. Select Snooze for by clicking + (plus) to increase or - (minus) to decrease the number of minutes to reset the alarm to go off again at another time. (The default is 5 minutes).

2. Click Turn to to turn to the entry for which the alarm was set.

3. Click OK to close the Alarm dialog box.

   **Note** If you selected the Start option when you set an alarm, Organizer starts the application you specified when you click OK. If you deselect this option, Organizer cancels starting an application when you click OK.

### Canceling an alarm

You can cancel an alarm that you set.

1. Edit the entry that you set an alarm for.
2. Click Alarm.
3. Click Cancel Alarm.
4. Click OK.
5. Click OK.

---

## Creating an entry to repeat at intervals you select

You can create Calendar appointments, To Do tasks, Calls entries, Planner events, and Anniversary entries to repeatedly appear in your Organizer section. For example, you can 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.

   See Chapters 6 - 12 for information on creating and editing entries in a specific Organizer section.
2. Click Repeat.
3. Under Repeats, select the type of repeating entry you want.

   For example, you can select Daily, Weekly, Custom, and so on; you must select the frequency with which you want your appointments to repeat, such as every day, each Tuesday and Thursday, and so on.

   There are numerous Repeats options available to you. Click the boxes to see them. If you want to select a custom date, under Repeats, click the first box and select Custom.
4. (Optional) If you select Custom in step 3, under Custom dates, select the customized date you want your appointments to repeat on.

   Select one date at a time and click Add to add each one to your Custom dates list. You can remove a date from your list by clicking the date and then clicking Remove.

5. Under Duration, select the options for the period of time when your appointments will repeat.

| *Option* | *Result* |
|---|---|
| Starting date | Indicates the date you selected for the first repeating entry. You can't change the date in this box; to start from a different date, select a different date by creating or editing a new entry with a new date. |
| Until | Lets you indicate through what date the entry will repeat. |
| For | Lets you specify the number of days, weeks, months or years for the entry to repeat. To select the interval at which you want the entry to repeat, click the box to select Day, Week, Month, or Year. To specify the number of days, weeks, months, or years to repeat, enter a number directly or click the + (plus) to increase or - (minus) to decrease the number. |

6. (Optional) Under At weekends, click the At weekends box and select the appropriate options to set your repeating entry to occur at a weekend or not when a date in the repeating series falls on a Saturday or Sunday.

   You can only change At weekends if you specified Monthly (Date) or Yearly in the first box under Repeats.

| *Option* | *Result* |
|---|---|
| Don't Move | Doesn't move (default) a repeating appointment if it occurs on a Saturday or Sunday. |
| Move to Friday | Moves a repeating appointment to the preceding Friday if it occurs on a Saturday or Sunday. |
| Move to Monday | Moves a repeating appointment to the following Monday if it occurs on a Saturday or Sunday. |
| Move to nearest weekday | Moves a repeating appointment to either the preceding Friday or the following Monday if it occurs on a Saturday or Sunday. |
| Delete | Deletes a repeating appointment if it occurs on a Saturday or Sunday. |

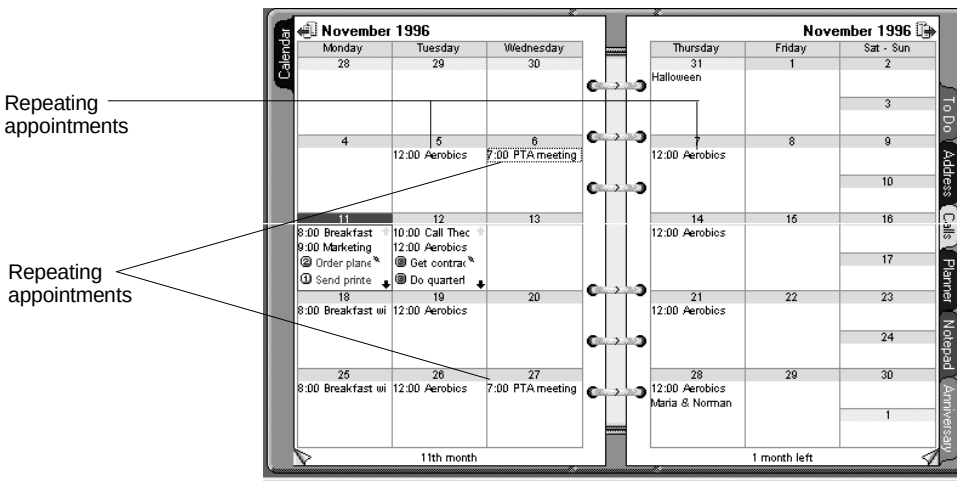
   Under Your selection, Organizer displays a description of the repeating options you selected.

7. (Optional) Click Reset to clear your selections without closing the Repeats dialog box.
8. Click OK.
9. Click OK.

**Tip** You can recognize entries that repeat by displaying the repeat symbol next to your entries (except Planner events) in your Organizer section. If you haven't set your Organizer section to show the repeat symbol next to repeating entries, choose one of the following commands, depending on what section you're in: View - Calendar Preferences, View - To Do Preferences, View - Calls Preferences, or View - Anniversary Preferences. Under Options, select the repeat symbol and click OK.

## Deleting or changing a repeating entry

When you delete or change a repeating entry, the deletion affects the repeating entry as it represents one specific group of repeating entries. The deletion or change doesn't affect all repeating entries in Organizer. Let's say you have an appointment that repeats every third Tuesday, and another repeating appointment the occurs every Friday, and you decide to delete or change the first repeating appointment (every third Tuesday). Only those appointments for every third Tuesday are affected; the repeating appointment that occurs every Friday isn't affected.



1. If you're deleting a repeating entry, select the repeating entry you want to delete, and drag and drop the entry to Trash in Toolbox.

   **Tip** You can also select the repeating entry and click **DEL** to delete the repeating entry.

2. If you're changing information for an entry that repeats, select the entry and make your changes.

3. Select one of the following options.

| *Option* | *Result* |
|---|---|
| Just this one | Deletes or changes the selected entry only; for example, your weekly Tuesday appointment is deleted or changed for one Tuesday. |
| All | Deletes or changes the repeating entry entirely; for example, your weekly Tuesday appointment is deleted completely. |
| All previous | Deletes or changes the selected repeating entry and all previous repeating entries for the specific group; for example, your weekly Tuesday appointment is deleted or changed from the specified date and any previous dates. |
| All future | Deletes or changes the selected repeating entry and all future repeating entries for the specific group; for example, your weekly Tuesday appointment is deleted or changed from this week and any future dates. |
| All until | Deletes or 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 appointment is deleted or changed. |

4. Click OK.

## Linking Organizer entries

You can create links between discrete pieces of information in different Organizer sections 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 then to a Notepad page that lists the appointment's agenda.

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.

**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.

### Creating one or multiple links

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 a hand with a partial link.

3. Select the information you want to link, for example, a To Do task.

The pointer changes to a hand holding a complete link.

4. Locate the information you want to link to, such as an Address record.

5. Click the entry you want to link to.

When you select the entry you want to link to, Organizer places the link symbol next to each entry you clicked.

6. Repeat steps 1 - 5 above to create more links.

**Tip** You can also create a link between two or more selected entries. Click the first entry you want to link; then press and hold **CTRL** as you click any additional entries you want to link to. You can also choose Create - Organizer Link to create a link between two or more selected entries.

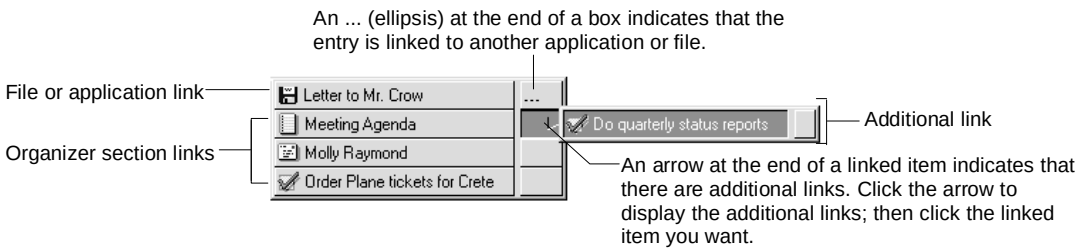
## Seeing what a link is connected to

You can quickly see what a link is connected to in what is called a Link menu. A **Link menu** is a rectangular box that displays the link's description, the Organizer section the linked information is in, and whether the linked entry contains more than one link. If there is more than one link, there are several rectangular boxes — one box for each link. You can use the Link menu to navigate through linked information by clicking the description of the linked information you want to go to.

1. Go to the linked entry and click the link symbol next to the entry.

   One or more rectangular boxes appear.

2. From the Link menu, click the link you want more information on.




   Organizer goes to the linked item you select.

   You can remove the display of the Link menu by clicking anywhere on the page.

## Changing the order of links

You can change the order in which your linked entries and descriptions appear. For example, you can display your links by the date each entry was created, rather than in the order in which you created the links.

1. Select the linked entry you want to edit.

2. Choose Edit - Organizer Links.
3. Under Order by, select the options for how you want to order your linked entries.

| *Option* | *Result* |
|---|---|
| User defined | Displays linked entries in the order they were created. |
| Ascending date | Displays linked entries in chronological order, oldest entry first. |
| Link description | Displays linked entries in alphabetical order by the first letter of the entry description. |
| Descending date | Displays linked entries in reverse chronological order, newest entry first (default). |

4. Click the Up command button to move the selected link up the list; click the Down command button to move the selected link down the list.
5. Click OK.

## Displaying a list of Notepad links on a Notepad Links page

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.
3. Click OK.
4. Create Notepad links to the Notepad Links page as you normally do.

   As you add links to the Notepad page, Organizer enters the description of the entry you're linking to to the page. You can click the entry on the page to go to that entry.

   To create links, see “Creating one or multiple links,” earlier in this section.
5. (Optional) Click the entry on the Notepad Links 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.

## Deleting or “breaking” links

You can delete any link you create. When you delete a link, you don’t delete information, you only remove the link.

You can undo breaking a link by choosing Edit - Undo Link Delete before you perform another action.

1. Go to the information you want to remove the link for.

2. Click the Broken link icon in Toolbox.

   When you move the pointer over the link symbol you want to break, it changes to a hand holding a broken link.

3. Click the link symbol 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, the link symbol no longer appears next to the entry.

**Tip** 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.

## Linking information with other files and applications

You can create a link from information in Organizer to other files and applications so those files and applications are accessible in the context of your daily work. 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, enter the path and file name of the file you want to link to.

   If necessary, click Browse to see the Organizer files available to you.

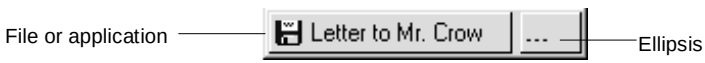
   To link to an external file with a non-standard extension, specify the path to the application that the file was created in, followed by a space; then specify the path to the file. For example,
   C:\WPWIN\WPWIN.EXE
   D:\ORGANIZE\SAMPLE\MAILMRG.PRM
5. Click OK.

## Accessing another file or a linked application

You can access another file or run an application using a link you already established.

1. Go to the entry that's linked to the file or application you want.
2. Click the link symbol.

   The Links menu appears. Any link to another 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.
4. When you finish with the external file or application, choose File - Exit or switch back to the Organizer window.

   **Tip** To switch between Organizer and any open Windows application, press **ALT+TAB**.

Some applications don't let you run more than one copy of the application at a single time. Also, if you select a link and nothing happens, the application may already be running.

### Changing a link's description, file name, or application to link to

You can change the description or file name of any link to another file or application.

1. Go to the link whose description or file name you want to change.
2. Click the link symbol.
3. Click the ... (ellipsis) at the end of the linked item.
4. Edit the link description or path and file name.

   If necessary, click Browse to see the Organizer files available to you.
5. Click OK.

## Starting another application from within Organizer

You can start an application from the Calendar, To Do, Planner, Calls, and Anniversary sections. Starting an application works in conjunction with setting an alarm. That is, you start an application by setting an alarm.

1. Create or edit an entry.

   See Chapters 6 - 12 for information on creating and editing entries in a specific Organizer section.

2. Click Alarm.
3. In the Start here text box, enter the path and file name of the application you want to start.
4. (Optional) Click Browse to see a listing of available applications.
5. Click OK.
6. Click OK.

## Working with 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.

Although Organizer includes a number of common categories, including Clients, Expenses, Issues, and more, you can create or customize your own categories. For example, you can create a category for all entries that apply to a particular project, and then assign the entries in various sections to that category. You can then easily view and work with all appointments, To Do tasks, Calls entries, and other entries that pertain to a particular project.

### Assigning a category to an entry

1. Create or edit an entry.

   See Chapters 6 - 12 for information on creating and editing entries in a specific Organizer section.

2. Click the Categories box and select one or more categories from the list that appears.
3. Click OK.

   **Tip** You can also select the entry and press **F5**, or depending on what section you're in, choose one of the following commands: Appointment - Categorize, Task - Categorize, Address - Categorize, Call - Categorize, Event - Categorize, Page - Categorize, or Anniversary - Categorize. In the Categorize dialog box, select the categories for the entry from the list under Categories and click OK.

## Creating a new category

You can add your own categories to the list of categories in Organizer.

1. Choose Create - Categories.
2. For Name, enter a new category name.

   To enter more than one category at one time, separate the new category names with , (comma). For example, to enter two new categories named "Work" and "Home," type Work,Home.
3. (Optional) Click the Symbol box and select a symbol to associate with the category you selected in step 2.

   **Note** If you're creating more than one category, you can associate a single symbol with all the categories by clicking the Symbols box and selecting a symbol before going to the next step in this procedure. To associate different symbols with individual categories, follow step 4. Then, select each category and click the Symbol box and select a symbol from the list that appears.
4. (Optional) Click Add to create the new category or categories.
5. Click OK.

## Customizing your categories

In addition to creating your own categories, there are several ways you can customize the list of categories you can use in Organizer. For example, you can rename an existing category, you can change the symbol for an existing category, and you can delete a category. You can also view all entries within a certain category.

### Renaming a category

1. Choose Create - Categories.
2. For Categories, select the category you want to rename.
3. Click Rename.
4. For New name, enter a new name for the category.
5. Click OK.
6. Click OK.

### Changing a symbol for a category

Organizer comes with many symbols from which you can choose. You can't create your own symbols to add to the list.

1. Choose Create - Categories.
2. For Categories, select the category whose symbol you want to change.
3. Click the Symbol box and select a new symbol.
4. Click OK.

### Deleting a category

You can delete an entire category so that it's not available for categorizing any entries.

**Caution** You can't undo deleting a category. Organizer deletes the category and also removes it from any entries.

1. Choose Create - Categories.
2. For Categories, select the category you want to delete.
3. Click Delete.
4. Click Yes when Organizer prompts you whether you want to delete the category.
5. Click OK.

## Displaying a category name and/or symbol with your entry

You can display the category name and / or category symbol with entries (except Planner events) in an Organizer section. See chapters 6 - 12 for information on customizing a particular Organizer section.

## Displaying all entries associated with a category

To display only entries in a certain category, you must create a filter that specifies the category and the sections you want the filter to affect. Then choose View - Select Filter to display the entries. For more information on how to do this, see "Using Filters," later in this chapter.

## Using customer and cost codes

Customer and cost codes let 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. You create your own customer and cost codes and then assign them to entries in your Calendar, To Do, Calls, Planner, and Anniversary sections.

Let's say MCR Consulting is one of your clients. You can create a customer code for MCR Consulting, as MCR, and a cost code, as $50.00 per hour. At the end of the month, you can estimate monthly billing for MCR Consulting based on the customer and cost code you assigned.

### Creating a customer and cost code

1. Choose Create - Cost Codes.
2. Under Customer codes, enter a code associated with the customer in the Code box.

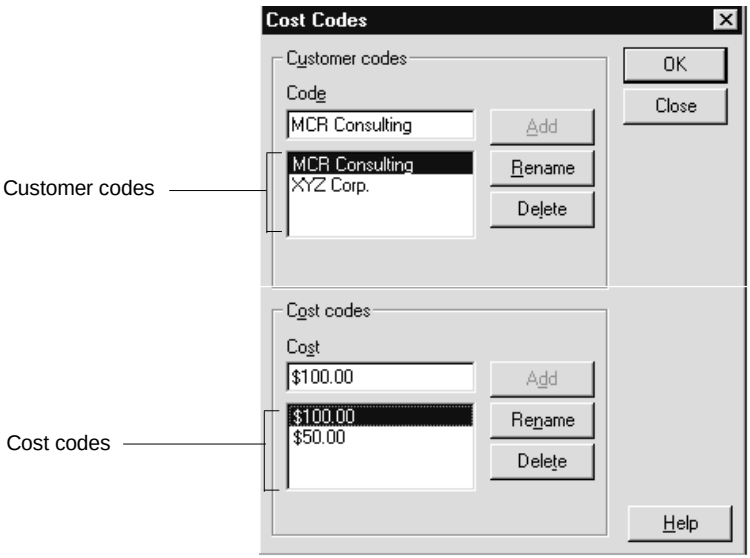
   For example, enter a client's name or a project you're working on, such as MCR.
3. Click Add.
4. Under Cost codes, enter a cost associated with the code in the Cost box.

   For example, enter a dollar amount , such as $50.00 per hour.
5. Click Add.
6. Repeat the steps 2 - 5 to add as many customer and cost codes you want.
7. Click OK.

### Renaming a customer or cost code

1. Choose Create - Cost Codes.

2. Select the customer or cost code you want to edit from the list.




3. In the text box, click anywhere on the code and make your changes.
4. Click Rename.
5. Click OK.

## Deleting a customer or cost code from a file

When you delete a customer or cost code in this way, you delete this code from all entries it's assigned to in your Organizer file.

**Caution** You can't undo deleting a cost code. Organizer deletes the code and also removes it from any entries.

1. Choose Create - Cost Codes.
2. Select the customer or cost code you want to delete from the list.
3. Click Delete.
4. Click OK.

## Assigning a customer and cost code to an entry

You can only assign one customer and one cost code per entry.

1. Create or edit an entry.

   See Chapters 6 - 12 for information on creating and editing entries in a specific Organizer section.
2. Click Cost.

3. Click the Customer code box and select a customer code from the list that appears or enter a new customer code.
4. Click the Cost code box and select a cost code from the list that appears or enter a new cost code.
5. Click OK.
6. Click OK.

### Removing a customer and cost code from an entry

When you remove a customer or cost code associated with an entry, you only delete the codes for that particular entry.

1. Select the entry you want to delete the cost code for.
2. Depending on what Organizer section you're in, choose Appointment - Cost, Task - Cost, Event - Cost, Calls - 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.

### Displaying customer and cost codes with entries

You can display the category name and / or category symbol with entries (except Planner events) in an Organizer section. See chapters 6 - 12 for information on customizing a particular Organizer section.

### Displaying all entries associated with a customer and cost code

To display only entries within a certain customer code or cost code, you must create a filter that specifies the code and the sections you want to affect. Then choose View - Select Filter to display the entries. For example, you can use a filter to display all of your Calendar appointments and Calls entries within a certain cost code that you assigned to a particular client. For more information, see "Using filters," the next section in this chapter.

## Searching for information in your Organizer entries

You can find specific text in any Organizer section by entering the same text contained in the entry you want to find. You can find text from any section of Organizer. For example, you can find text from any field of any Address record you're looking for, such as name, company, notes, and so on.

1. From any Organizer section, choose Edit - Find.

   **Tip** You can also press **CTRL+F** to search for text in an Address record.
2. For Find, enter the text you want to find.

3. Under Options, select the options for how you want Organizer to find your information.

| *Option* | *Result* |
|---|---|
| Case sensitive | Searches for an exact text match, including the same capitalization. For example, if you search for the name Smith, Organizer won't find smith. |
| Whole word | Searches for whole words, specifically, not just the first few letters of a word. For example, if you search for the word plumber, you must use the whole word, not plumb. |
| Section | Searches for a text match in the Organizer section you specify. |
| All sections | If you go to the section in which you want to look for text, the default will be to look in that section. |

Organizer searches for exact text by default.

If you don't select the case sensitive or whole word option, the default is to search for any text you enter, regardless of case sensitivity or whole word status.

4. Click one of the following command buttons.

| *Command button* | *Result* |
|---|---|
| Find Next | Finds one entry at a time for you and turns to that entry within which the specified text appears. |
| Find All | Finds all entries within which the specified text appears, and lists them in the Occurrences box. |

If no match is found, Organizer displays a message saying that the text you're searching for can't be found.

5. To go to an entry you want to see, double-click the entry in the Occurrences box.

Occurrences displays your entries that match your search in either of two ways: one text match at a time or all text matches in a list.

**Tip** You can also select the entry in the list box and click Turn To to go the entry.

6. Select one of the following options.

| *Option* | *Result* |
|---|---|
| Clear list | Clears the list after each text search is completed (default). |
| Append to list | Maintains a list of all text search matches. |

7. When you finish searching, click Close.

## Using filters

You can use filters to display a subset of your Organizer entries based on criteria you specify. You can base your criteria on text, numbers, dates, Organizer attributes (such as a category or cost code), or any combination of these. For example, if you want to prepare a mailing, 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. You can save the filters you create, and you can also add them to the Organizer menu under the View - Apply Filter menu, so you can quickly switch between a filtered view and a view of all entries.

Organizer works the same way whether you're 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 before you set the filter.

### Creating a filter

You must create a filter before you apply it.

### For more information

To learn how to create a filter, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Filters, creating
3. Click Display.

### Applying a filter

You can apply a filter when you create it, or whenever you need to apply the filter.

**Note** 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. 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.

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 until you apply the filter again. For example, if the current filter displays all Calendar appointments

earlier than November 14, and you create an appointment on November 15, the appointment for November 15 will appear until you apply your filter again.

1. Choose Create - Filter.
2. Under Filters, select the filter you want to apply.
3. Click Apply.

### Clearing a filter

To clear a filter so that Organizer redisplays all entries in all sections, while keeping the filter to use at a later date, choose View - Clear Filter. You can also choose Create - Filters, select (None), and then click Apply.

### Removing a filter

**Caution** You can't undo deleting a filter.

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

## Compacting Organizer files

You can compact your files on a periodic basis to ensure they remain the smallest size possible. When you compact a file, Organizer actually reduces the size of the file on disk. Let's say you're using Organizer on a notebook computer. You can compact your Organizer files to conserve limited hard-disk space on that notebook computer.

**Note** You cannot compact an open file.

1. Choose File - Compact.
2. (Optional) Click the Look in box and select the path you want Organizer to use to find the file you want.
3. For File name, enter the name of the file you want to compact.
4. (Optional) Click the Files of type box and select the type of 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 appears.
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.

## Archiving Organizer information

To keep your Organizer file size manageable, you can archive information you don't need on a day-to-day basis. For example, you can archive old To Do tasks or Calendar appointments.

When you archive information from a file, Organizer deletes the information from your file and stores the archived information in a separate .OR3 file. You can still access this archived information because you can open the archive file. However, the archived information will no longer appear in your original Organizer file.

The archive file includes all alarms, cost codes, and categories made in the original file. Entries that were repeating still appear in the archive file but they're no longer designated as repeating and they no longer include the repeating entry symbol.

You can archive more than one section in a single archive file, although you must perform a separate archive operation for each section you archive.

1. Choose File - Archive.

   **Tip** You can also press **CTRL+A** to archive information.
2. If you haven't saved changes to your file, Organizer asks you if you want to save the file. Click one of the following command buttons.

| *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. |

3. Click the Section box and select a section from which to archive entries.

4. Under Range, select one of the following options.

| *Option* | *Result* |
|---|---|
| All | Archives all entries in the section you select. |
| Before | Archives all entries prior to the date you select in the section you select. Organizer archives entries as follows: appointments or anniversaries that occur before the date you select; completed To Do tasks whose due date occurs before the date you select; Planner events with an end date before the date; Calls entries made before the date you select; Notepad entries entered before the date you select. |

5. For Archive file, enter a name for your archive file.

   A file name can contain up to 255 characters, including spaces, but it can't contain any of the following characters: \ / : * ? " < > |

   If necessary, click Browse to see the Organizer files available to you.

6. (Optional) Select the Compact file after archive option to compact your file after you're finished archiving the file.

   **Note** If the file allows more than one person to have the file open at the same time, you must be the only user with the file open to compact the file. To ensure you're the only user using the file, change the file type to Single-user access. Choose File - Save as. Under Save file as type, select Single-user access Lotus Organizer (*.OR3) and click OK.

7. Click OK.

8. Repeat steps 1 - 7 for any other sections you want to archive.

## Importing and exporting information with Organizer

When you import or export information, you're copying one application's file and all of its information to another application's file. For example, you can import Address records from a database application directly into your Address section; or you can export Notepad entries to another application, such as a word processor.

### Importing

You can import information from ASCII (*.TXT, *.CSV), dBASE® (*.DBF), and FoxPro® (*.DBF) formats. Most databases, word processors, and spreadsheets export information in one of these formats.

1. Choose File - Import.
2. Click the Look in 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 box and select the type of file you want to import.

   You can choose the following file formats: ASCII Text (*.TXT, *.CSV), dBASE (*.DBF), and FoxPro (*.DBF).
5. Click the Into section box and select the section into which you want to import information.
6. Click the Field mapping box and select the type of field mapping you want to use.

   The Organizer default for importing files is to map all fields from the import file to fields in the Organizer section. The Field mapping box contains the Organizer default field-mapping selection All fields. The Field mapping box also contains the names of any field-mapping selections that you created, named, and saved.
7. (Optional) Click Mapping to create new field-mapping connections.

   Click OK when you finish.

   See "Using and managing field mapping," below, for more information.
8. Click Options and select the options you want to import your information.

| *Option* | *Result* |
|---|---|
| File translation | Translates the file you're importing to a format Organizer can accept. (Windows ANSI is the default translation.) |
| Ignore duplicate entries | Ignores or doesn't ignore (default) any existing records in Organizer that are duplicates of the record you're importing. |
| Field names as first entry | Imports or doesn't import (default) field names first. This option is available if you're importing in ASCII Text format only and the field names are at the beginning of the file. |

9. Click OK.
10. Click Import.

## Exporting

You can export Organizer information for use in another application. If you want export information, you must export it in a format that the other application understands. Organizer provides several formats, such as ASCII (*.TXT), ANSI Text (*.TXT), dBASE (*.DBF), and FoxPro (*.DBF) formats. Many applications support the ASCII and dBASE file format.

To export a subset of information, apply a filter to the section before you export the information. See “Using Filters,” earlier in this chapter, for more information.

### For more information

For more information on how to export Organizer information, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Exporting, exporting entries
3. Click Display.

### Using and managing field mapping

When you map fields while you’re exporting or importing, you’re selecting which fields in a file to copy to which locations in another file.

You can map all fields, or you can map specific fields. For example, you can import a file from an application or export a file to an application whose fields are named differently from the fields in Organizer. You can also import or export only a portion of the information contained in the import or export file, such as a person’s name and telephone number.

Let’s say you’re exporting a business Address record, and the file you’re exporting to has a field named Field 1 - Business position. You can map the Organizer section field (named Job title) to the export file field (named Field 1 - Business position).

If you import or export the same type of information from or to the same applications on a frequent basis, the fields you map to are always the same. When you map fields with Organizer, you can save the field-mapping connections you created to eliminate needing to repeat the actual field map.

### For more information

For more information on how to map fields for importing and exporting, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type Mapping fields, while importing or exporting entries
3. Click Display.

# Chapter 14
# Networking in Organizer

You can work with Organizer on your network and on your notebook computer. In a network environment, Organizer provides password protection for your files and lets you share files and sections with other users on the network. You can set up your Organizer file for multiple-user access so that you and others can open and use the file at the same time. The merge feature lets you consolidate any changes you make to your notebook computer file with the file on the network you use at work.

TeamMail, a new feature of Organizer, uses the mail system installed on your computer to create and send text-only messages to one or more people without leaving Organizer. TeamMail also lets you send a message containing selected Organizer entries.

Organizer Help menu choices and SmartIcons give you automatic access to Lotus Internet sites. You can access the Lotus home page, the Lotus Customer Support home page, and the Lotus Customer Support FTP site. These sites contain information on a variety of topics and give access to Lotus Customer Support.

## Using passwords to protect your file

You can use passwords to protect your file so that other users can't open your file. You can also use passwords to allow different types of access to your files, or how much information others can see or change in your file.

### Setting passwords for a 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 also enter the password to open the file.

You can set three types of access when you set passwords for a file: Owner, Assistant, and Reader. You must give the password to those you want to be able to access your file with the particular access right. For example, if you used "Antioch" as a Reader password, give this password to any users you want to have Reader access to your file.

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 each type of access you want to give a user.

| *Option* | *Result* |
|---|---|
| Owner | Lets a user see and change all entries (including entries marked confidential) in and preferences for a file. Owner access lets a user set the type of access and passwords for other users. 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, they can view all the contents of your file, make changes to your file, as well as change all passwords. It isn't recommended that you give anyone else Owner access to your file. |
| Assistant | Lets a user see and change entries (except entries marked confidential) in and preferences for a file. Assistant access lets a user schedule appointments and change preferences but won't let a user view or change entries that are confidential. Assistant access doesn't allow a user to change passwords for the file. |
| Reader | Lets a user 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. After you enter a password for Owner access, Press **TAB** to highlight the Assistant password field and enter a new password. Press **TAB** again to highlight the Reader password field and enter a new password.

6. Click OK.
7. Confirm the password by entering it again.
8. Click OK to confirm the password.
9. Click OK.

**Note** 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 to a file, you can change the passwords in that file.

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 step 4 in "Setting passwords for a file," above, for information on how to set a password.
5. Click OK.
6. Confirm the password by entering it again.
7. Click OK to confirm the password.
8. Click OK.

### Removing a password

If you have Owner access to a file, you can remove the passwords in that file.

1. Open the file whose password you want to remove.

2. Choose File - Save As.
3. Click Passwords.
4. Highlight the text box of the password you want to remove and press **BACKSPACE**.
5. Click OK to confirm that the password text box should be empty.
6. Click OK.

## Sharing your files

If you share your Organizer files with other users on a network, you can control access to your files with passwords, and you can also control how many users can access your file at one time.

In addition to sharing entire files, you can share sections of Organizer files by including sections of other files. By including sections, you can share information among users.

## Controlling how many users can access a file at one time

You can specify single-user access or multiple-user access when you save an Organizer file. **Single-user access** means that only one user can access the file at a time. **Multiple-user access** means that more than one user can open and use the file at a time.

**Note** If two users work on the file at the same time, Organizer saves the file after each change that is made to the file.

1. Choose File - Save As.
2. If necessary, in the File name box, enter a file name.

   Click the Save in box and select the path you want Organizer to use to save the file.
3. Click the Save as type box and select whether one user or more than one user can access your file at the same time.

| *Option* | *Result* |
|---|---|
| Single-user access Lotus Organizer (*.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 (*.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. |

4. Click Save.

**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.

## 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) to the user with Assistant access to your file at regular intervals. The user with Assistant access to your file can merge your changes with his or her changes to the network, 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 to continue working on while you're away from the office.

When you receive the updated file by e-mail, you should replace your 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've been working on away from the office with your file at the office on the network.

## Merging files

Consolidating Organizer files is called **merging**. The files you merge must share the same origin — that is, of the two files, one must be a copy from the original file.

**Tip** To create two files that can later be merged, use File - Save As to create the parent-child relationship. Save As retains the original file, and makes a copy that shares the same properties.

Organizer merges additions, deletions, and edits to entries in sections (for example, an edited appointment or added To Do task). Other settings (such as password changes, access levels, or changes to section preferences) aren't merged.

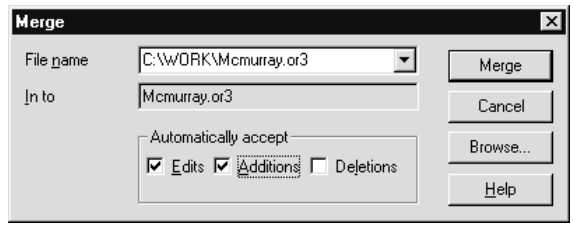
1. Choose File - Open and select the target file into which you want to merge the source file.
2. Choose File - Merge.

   **Tip** You can also press **CTRL+M** to merge files.

3. Click the File name box and select a file (the source file) to merge.

   If necessary, click Browse to select the source file to merge.

   **Tip** The file you select to merge must be a parent or child of the one you're merging it with. You must have created one file from the other at some point.




4. Click Merge.
5. Under Automatically accept, select the appropriate options to indicate which changes and additions from the source file you want to automatically enter in the target file.

| *Option* | *Result* |
|---|---|
| Edits | Enters all edits from the source file. |
| Additions | Enters all additions from the source file. |
| Deletions | Enters all deletions from the source file. |

6. If you don't automatically accept any options, Organizer displays the Select Merge Entries dialog box where you can select specific entries to merge into the target file.

   Click the tabs for each section: Edits, Additions, Deletions.
7. Click OK.

## Sharing sections of Organizer files

Files containing shared sections must be saved in the same location. For example, you can save these files on a network server. These files must also be saved with multiple-user access. To save a file with multiple-user access, see "Controlling how many users can access a file at one time," earlier in this chapter.

You can make changes to an included section if its original file wasn't password-protected or if you entered either the Assistant or Owner password when you included the section. For example, if the file with the section you're including was saved with an Assistant password and multiple-user access, you can access the included section of that file at the same time as someone else.

Organizer keeps track of the entries in included sections and won't let two users work on the same entry at the same time. By default, Organizer saves a multiple-user access file after each change.

If the information in an included section changes in the originating file, you can see the change in the included section. Press **F9** while you work in the included section to update all entries in an Organizer file and see the section's most recent changes.

## Including a section from another Organizer file

When you include a section from another user's file, your own file will include that section you're sharing unless you delete it. For example, if you're an assistant, you can include your manager's To Do section in your file with your own To Do section.

**Note** You can't include a section in an untitled file. Save your file by choosing File - Save before you complete the steps below.

1. Choose Section - Include.
2. For From, enter the name of the file from which you want to include a section.

   If necessary, click Browse to see the Organizer files available to you.
3. For Section, select the Organizer section you want to include.
4. (Optional) For Tab name, enter a name for the section that will appear in your file (for example, Manager's To Do).

   If a section already exists in your Organizer file with the same name as the section you're including, and you choose not to give it a unique name, Organizer adds a : (colon) and a number to the included section to make its name unique: for example, To Do: 1. However, it's a good idea to create a unique name for an included section. For example, you can use your initials to identify your own section and the other user's initials for the included section.
5. Click OK.

**Caution** You can *only* include a section from another file *if* that file was saved as multiple-user access. If you're including a section from a password-protected file, you'll be prompted for a password.

## Using TeamMail

TeamMail works with your current electronic mail system to send and receive mail messages from within Organizer. TeamMail uses the mail system installed on your computer to create and send messages to one or more people. TeamMail supports cc:Mail™, Lotus Notes®, and other e-mail systems including VIM® and MAPI-based systems.

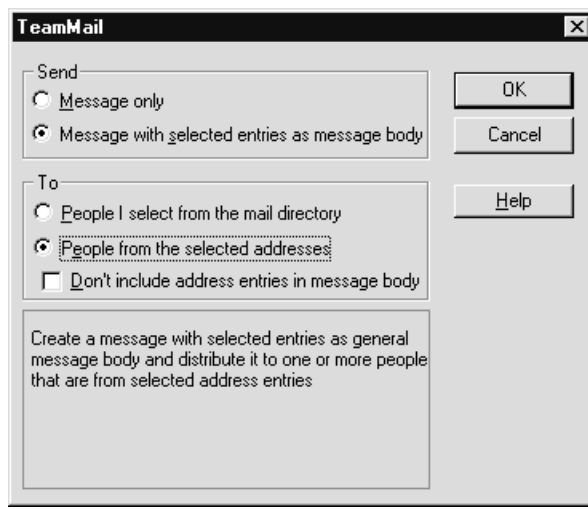
Using TeamMail you can do the following tasks:

- 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.

**Note** To use TeamMail in Organizer 97, you don't need to close Organizer.

### Sending mail

1. Choose File - TeamMail.



**2.** Under Send, select one of the following options.

| *Option* | *Result* |
|---|---|
| Message only | Sends text messages. |
| Message with selected entries as message body | Sends Organizer entries as the text of the message. |

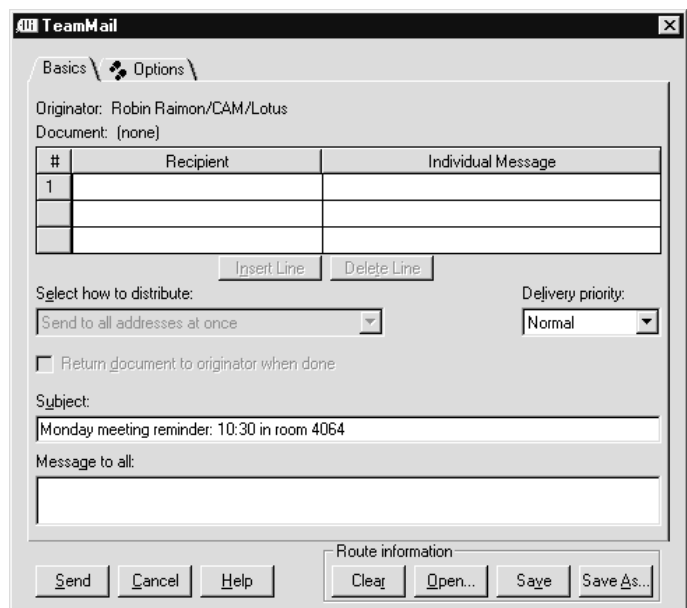
**3.** Under To, select from the following options.

| *Option* | *Result* |
|---|---|
| People I select from the mail directory | Lets you select from your mail directory. This is the default. |
| People from the selected addresses | Lets you select from addresses. |
| Don't include addresses in message body | Select this if you don't want address information in your message. |

**4.** Click OK.

**5.** Enter your password and any other information your e-mail system requires and click OK.

The TeamMail dialog box appears.



6. For the first Recipient box, specify to whom to send the message, such as Lucille Crow.

   **Note** Enter the name of the person to receive the message in the format used by your e-mail system. You must specify at least one recipient for each message.

   **Tip** If you want to look up a name, click on the right side of the Recipient box to access one of your mail system directories.

7. Enter an individual message.
8. (Optional) Enter other recipients and individual messages.
9. (Optional) Click the Delivery priority box to specify the mail message priority.

   The available priorities depend on your e-mail system. Some typical choices include Normal, High, and Low.

10. (Optional) For subject, enter a purpose or description of the message.
11. (Optional) Under Message to all, specify a general message for all recipients.
12. Click Send.

    TeamMail sends your message to the designated recipients.

### For more information

For more information on using TeamMail, refer to Help (online documentation).

1. Choose Help - Help Topics and click the Index tab.
2. Type TeamMail, sending messages
3. Click Display, select the appropriate topic, and click Display again.

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## 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. See Chapter 11, for more information about embedding an OLE object.

### 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 to 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® home page.

### Lotus Customer Support home page

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.

## Selecting Lotus Internet sites

To automatically access Lotus sites, choose Help - Lotus Internet Support - and one of the commands shown below:

| *Command* | *Result* |
|---|---|
| Lotus Home Page | Goes to the Lotus home page. |
| Lotus Support | Goes to the Lotus Customer Support home page. |
| Lotus FTP site | Goes to the Lotus FTP Site. |

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