

## Edit Commands

Use these commands to copy and paste information between the Organizer and the Windows Clipboard.

**Undo**  (CTRL+Z)

Restores the most recently deleted information that was put in the Trash.

**Cut**  (CTRL+X)

Removes selected text and places it on the Clipboard for pasting in an Organizer file or another application.

**Copy**  (CTRL+C)

Copies the selected text onto the Clipboard. You can paste the copy into an Organizer file or another application.

**Paste**  (CTRL+V)

Places a copy of the text on the Clipboard in your Organizer file or in another application. Currently selected text or pictures are replaced by the pasted information.

**Clear**  (DEL)

Deletes the currently selected text without placing it on the Clipboard.

Paste DDE Link

Pastes a DDE link from another application to a DDE link Notepad page.

Copy Special

In the Address section, copies a subset of fields once you select an Address entry.

Search (F3)

Searches for text you specify.

See also:

[Editing a Record](#)

[Shortcuts for Entering Names and Addresses](#)

## **Edit Search**

Searches for text you specify. The Organizer matches the text you type with instances at the start or end of a word, or within a word. Make your selections from the Search dialog box.

### **For**

Specifies the text for which you want to search.

### **Case-sensitive**

Specifies that you want to match uppercase and lowercase exactly as you typed it for the text for which you want to search.

### **In**

Selects the section or sections in which you want to search.

### **All**

Searches in every section.

### **Search**

Begins the search.

### **Search results**

Displays each matching record and the number of matching records found.

### **Turn to**

Displays the record you select in **Search results**.

### **Clear**

Before searching, removes the selections for **In**. After searching, removes the list of matching records in the **Search results** box.

See also:

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## Using the Organizer Utilities

A Lotus Organizer (.ORG) file can become damaged if another program changes that file accidentally, or if the computer experiences a power loss or surge that destroys information on the hard disk or in memory. You can use the Organizer Utilities to help fix any problems with the integrity of your file.

You should suspect that your Organizer file may be damaged if you experience problems when you turn pages, add information, or try to save or open the file. Your file may be damaged if you get unexpected Windows General Protection Faults or UAEs (Unrecoverable Application Errors).

In addition, the Organizer Utilities can compact your Organizer file into its smallest possible size. This is useful if you continually add and delete large pieces of information, such as pictures in your Notepad.

**Note** You may wish to run the Organizer Utilities occasionally to simply verify the integrity of your file.

### To run the Organizer Utilities

1. Choose File/Close to close the current Organizer file.
2. Click the Organizer Control Menu icon in the upper left corner of the screen and choose Run.

**Note** You can also access the Control Menu by pressing ALT+SPACEBAR.

Or, you can run the Organizer Utilities from the Windows Program Manager. Choose File/Run and type the full path (for example, C:\ORGANIZE\ORGUTILS.EXE). Then choose OK.

The Organizer displays the Run Program dialog box.

3. Select Organizer Utilities and choose OK.

The Organizer displays the Organizer Utilities window.

4. Choose **Open**.
5. Select the file to verify and choose OK.

A status box indicates progress as the file is checked.

6. If an error is detected, you are prompted to repair the file. Choose **Yes** or **No**.
  - If you choose **Yes**, a status box indicates progress as the file is repaired.
  - If you choose **No**, you can select a section from the **Section** list to see more information. You can then choose **Repair** to repair the file.

**Note** Whenever the Organizer Utilities repair a file, the program makes a back-up copy in a file of the same name with the extension .OLD. For example, SAMPLE.ORG would be copied to SAMPLE.OLD.

7. If no errors are detected, choose OK to continue.
8. If the file needs compacting, the Organizer Utilities prompt you to compact the file. Choose **Yes** or **No**.
  - If you choose **Yes**, a status box indicates progress as the file is compacted.
  - If you choose **No**, you can still choose to compact the file by choosing **Compact** from the Organizer Utilities window.

**Note** Whenever the Organizer Utilities compact a file, the program makes a back-up copy of the original in a file of the same name with an extension of .OLD. For example, SAMPLE.ORG would be copied to SAMPLE.OLD.

9. If you repaired or compacted your file, choose **Save** to save it.

10. Choose **Close** to close the file.

**Note** If you haven't saved the file, you are prompted to do so.

11. Choose **Exit** to exit the Organizer Utilities.

**Note** If a file is badly damaged, the Organizer Utilities attempt to export the damaged information to an ASCII (CSV) format file. The remaining information in the file is repaired but will exclude any of the exported damaged information.

The exported information from the damaged file is written to files named *<section type>.CSV*. For example, damaged address records would be written to ADDRESS.CSV in the directory where the file was originally opened. You can examine these files using Windows Notepad or Windows Write, and you can attempt to reenter the information or import it back into your Organizer file.



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## Introducing Lotus Organizer

Welcome to Lotus Organizer™, the personal information manager that works the way you want it to.

The Organizer uses the metaphor of a notebook, with sections for your appointments and meetings, lists of things to do, names and addresses, anniversaries, yearly plans, and notes.

### With the Organizer you can:

- Create appointments and schedule meetings in your Calendar, set alarms to remind you of upcoming appointments and meetings, associate costs with time, and enter repeating appointments.
- Keep To Do lists that automatically show in your Calendar and carry forward to the next day.
- Store records of names, addresses, and phone numbers in your Address section. You can also search for a group of records and dial phone numbers.
- Keep notes and reminders in your Notepad. You can also display graphic images and bring in text from other applications.
- Plan activities for your whole year at a glance.
- Track anniversaries that carry forward to each year.
- Customize your Organizer sections as your needs change. You can add, reorganize, and delete sections. You can also rename sections and change the colors of their tabs.
- Print in a variety of formats, or print any page just as it appears on screen.

### Working with Windows

Before you begin working with the Organizer, you should understand the basics of Microsoft® Windows™.

Like other Windows-based products, the Organizer presents an easy-to-use graphical user interface. Because the Organizer operates in the Windows environment, it uses the standard Windows rules for selecting icons, menus, menu items, and options in dialog boxes.

Before you use the Organizer, you should know how to:

- Choose and cancel commands
- Move, move within, and cancel dialog boxes
- Work with command buttons, text boxes, list boxes, option buttons, and check boxes

**Note** For information, refer to the *Microsoft Windows User's Guide*.

**Note** The Organizer uses the left mouse button unless otherwise noted. To switch mouse buttons, use the Windows Control Panel.

### Lotus Organizer terminology

The following table explains terms you need to know to follow instructions in on-line Help.

<b>Term</b>	<b>Definition</b>
Choose	To pick an item that begins an action (applies to menu commands and command buttons in dialog boxes)
Click	To press and release the mouse button
Deselect	To unmark an item (applies to check boxes, option buttons, list boxes, and text)

- Double-click To press and release the mouse button twice in quick succession
- Drag To hold down the mouse button while moving the mouse
- Select To mark an item by highlighting it (applies to option buttons, check boxes, list boxes, and text)
- Specify To type text or a number in a text box

### **Learning about the Organizer**

Since the Organizer uses a notebook metaphor, it's easy and intuitive to use. You can explore the product in several ways:

- Simply click on the screen. For example, click the Calendar section tab to open the Calendar section.
- Open the sample files in the \ORGANIZE\SAMPLE directory. These files show you different ways to use the Organizer.
- Use this Help system. For example, press F1 from the main screen to access the index, or from a specific section or dialog box to search for a related topic.
- Scan the printed documentation for information on tasks you want to accomplish.

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## **Getting Started**

To work with the Organizer, you need to know about the following:

- [Starting the Organizer, opening files, and stopping the Organizer](#)
- [The Organizer pointer shapes](#)
- [Using SmartIcons and Toolbox icons](#)
- [Using keyboard shortcuts](#)
- [Using mouse shortcuts](#)
- [Saving files](#)
- [Using Help in the Organizer](#)
- [Using passwords to protect your files](#)
- [Setting up your Organizer files](#)

## Starting and Stopping the Organizer

You can start the Organizer from the Program Manager window when you run Windows.

1. Display the Program Manager window.
2. If necessary, open the group window that contains the Lotus Organizer icon.
3. Double-click the Lotus Organizer icon.

### To use the Organizer on a monochrome system

If you're using the Organizer on a system with a monochrome or gray-scale display:

1. Choose Options/Preferences.
2. Select **Monochrome** and choose OK.

The Organizer is now optimized for a monochrome display.

### To stop the Organizer

To leave the Organizer at any time:

- Choose File/Exit or press ALT+F4.

**Note** If you made changes in your file, the Organizer displays a message asking if you want to save the changes. Choose **Yes** to save your changes, **No** to discard the changes, or **Cancel** to remove the message and continue working in the Organizer.

### To open an existing Organizer file

1. Choose File/Open to open an existing file.

The Organizer displays the File Open dialog box.

**Note** If you are not using group scheduling, the Organizer displays a list of files instead of the names in the Directory. "Files" is selected under **List as**.

2. Select "Files" or "Names," and then make your selections from the dialog box that appears.

Select "Files" to use the Organizer on a stand-alone system or to open a specific file.

Select "Names" to open the Organizer file associated with a user name.

If you are using Organizer, Release 1.1, with group scheduling, you will usually select your own name. If you have other Organizer files that you don't use to schedule meetings, open them by filename.

- 3a. If you select "Files," the Organizer displays these options (see 3b. if you select "Names"):

#### **Open**

Type the name of the file you want to open.

#### **Files**

Lists files in the current directory that match the extension specified in the Open field. You can type a filename in the Open field or select a filename from the list. To display files with a different file extension, type the new extension and click OK.

#### **Directories**

Lists the available drives and directories. Select **[..]** to move up a directory level.

#### **Add to File menu**

Adds the selected filename to the end of the File menu so you can select it easily. To remove a filename previously added to the File menu, hold down SHIFT and select the filename.

#### **Open automatically**

Specifies the file to be opened automatically every time you start the Organizer.



3b. If you select "Names," the Organizer displays these options:

**Open**

Type a unique user name to open your own or another user's Organizer file.

**Name**

Lists names in the current Directory. You can type a name in the Open field or select a name from the list.

**Groups**

Lists the available directories.

**Add to File menu**

Adds the selected name to the end of the File menu so you can select it easily. To remove a name previously added to the File menu, hold down SHIFT and select the name.

**Open automatically**

Specifies the file to be opened automatically every time you start the Organizer.

4. Choose OK.

**Note** If the file you select has a password, the Organizer prompts you to enter the password. In Release 1.1, with group scheduling, your Organizer file is accessible to other users on the network. If you do not set a password, other people can easily view your Organizer file. For information, see [Using Passwords](#).

**Note** If the file contains an [included section](#) that cannot be located, the Organizer displays the File Open dialog box. Choose **Cancel** to open the file without the included section, or locate and select the correct included file and choose OK.

**To create a new file**



You can create a new file at any time.

- Choose File/New.

The Organizer opens an untitled Organizer file.

## Organizer Pointer Shapes

When you use the Organizer, the mouse pointer can assume the following shapes.

<b>Pointer</b>	<b>Context</b>	<b>Function</b>
	Menus, scroll bars, SmartIcons, dialog boxes, and so on	Shows mouse location.
	Any entry that can be clicked, dragged, or dropped	Selects, drags, or drops an entry. You can select the Hand pointer from the Toolbox.
	The bottom left or right corner of a page	Turns a page.
	In edit boxes	Indicates that you can edit text or numbers.
	Any place on the screen	Indicates that you must wait while the Organizer performs a function.
	Any entry you can move	Indicates that you can pick up an entry. You can select the Magnet pointer from the Toolbox.
	While moving an entry	Indicates that you are moving an entry.
	Any entry you can link	Indicates that you can link the current entry. You can select the Anchor pointer from the Toolbox.
	While making a link	Indicates that you are linking an entry.
	Any link	Indicates that you can break a link. You can select the Axe pointer from the Toolbox.

## Using Shortcuts

To speed up your work, the Organizer provides the following shortcuts:

- SmartIcons and Toolbox icons to automate menu commands and certain tasks
- [Keyboard shortcuts](#)
- [Cursor movement shortcuts for editing text](#)
- [Mouse shortcuts](#)

### SmartIcons

SmartIcons® automate Organizer menu commands. The Lotus Organizer Help system displays SmartIcons next to text where you can use SmartIcons shortcuts.

To use SmartIcons, position the mouse pointer on the icon and click the left mouse button. To find out what SmartIcons do, position the mouse pointer on the icon and hold down the right mouse button.

**Note** When you first start the Organizer, certain SmartIcons are displayed across the top of the screen. You can customize your SmartIcons by adding the ones you use most often and removing the ones you don't use.

The table below lists the default SmartIcons palette for the Organizer.

### **SmartIcons Function**



Create a new file



Open a file



Save a file



Print a file



Undo the last deletion



Cut information to the Clipboard



Copy information to the Clipboard



Paste information from the Clipboard



Search for text



Link to an external file (File/Reference is available only during linking)



Send a mail message



View the phone log



Position the SmartIcons palette anywhere on the screen and adjust its size



Customize Organizer sections



Access Help on using the Organizer



Exit the Organizer

### To customize your SmartIcons

You can specify which icons you want to appear in the palette, and where they are displayed on the screen.

1. Choose Tools/SmartIcons.

The Organizer displays the Tools SmartIcons dialog box.

2. Select the desired position for the SmartIcons palette.

#### **Floating**

Allows you to position the current set of SmartIcons anywhere on the screen and adjust its size. To move a floating set of SmartIcons, position the mouse pointer in the palette title bar and drag the set to the desired position. If you want to resize the palette, drag the border to the desired location.

**Note** If you don't want the palette to show at all, select "Hide palette." To redisplay it, select Tools/SmartIcons again and deselect "Hide palette."

3. Select **Customize**.

The Organizer displays the Customize SmartIcons dialog box.

**Note** Click on any icon to display its description at the bottom of the box.

4. Drag and drop any icons you want to appear in your palette from the **Standard icons** palette to the **Current palette**.

Use the scroll bar below the palette to view all available icons.

5. If there are icons in the **Current palette** that you don't want to appear, drag and drop them to the **Standard icons** palette.
6. If you want to rearrange the icons in your current palette, drag and drop them to the positions you want.
7. Choose OK twice.

### Toolbox icons

The Toolbox icons are on the left side of the screen, above the calendar day and time. Toolbox icons provide extra tools for performing operations and for automating tasks.

#### **Toolbox Icon**

#### **Function**



Select the Hand pointer



Pick up any entry and move it across pages or sections



Link information



Break the link between information



Drag information onto, or off of, the Windows Clipboard to copy or paste



Click, or drag and drop on a page in a section, to insert an appropriate entry



Turn back through pages you have viewed during the current session



Send and receive mail



Make a phone call or log an incoming call



Print information

SmartIcons is a registered trademark of Lotus Development Corporation.

## Keyboard Shortcuts

You can use Windows keyboard shortcuts and Organizer keyboard shortcuts for

- Organizer functions and commands
- Editing text

### Organizer function and command shortcuts

<b>Function</b>	<b>Shortcut</b>
Retrieve the last deleted entry from the Trash	ALT+BACKSPACE or CTRL+Z
Fold in a left or right page	ALT+↓
Unfold a left page	ALT+←
Unfold a right page	ALT+→
Select the Anchor tool	CTRL+A
Select the Hand tool	CTRL+H
Select the Magnet tool	CTRL+M
Go back to the last page you were on	CTRL+B
Go to the back of the notebook	CTRL+END
Go to the front of the notebook	CTRL+HOME
Go to the next section (except in the Address section) or, in the pop-up calendar, go to the next year	CTRL+PGDN
Go to the previous section (except in the Address section) or, in the pop-up calendar, go to the previous year	CTRL+PGUP
Go to the last page in the current section	END
Go to the first page in the current section or, in the pop-up calendar, go to today's date	HOME
Go to the previous page or, in the pop-up calendar, go back one month	PGUP
Go to the next page or, in the pop-up calendar, go forward one month	PGDN
Go to today's date in the Calendar	CTRL+T
Copy selected text or a Notepad bitmap or metafile to the Clipboard from the editing area	CTRL+INS or CTRL+C
Display the File Save As dialog box	CTRL+SHIFT+A
Display the Dial dialog box	CTRL+D
Export information	CTRL+E
Include a section from another Organizer file	CTRL+L
Import information	CTRL+I
Open a file	CTRL+O
Print information	CTRL+P
Link to an external file (File/Reference is available only during linking)	CTRL+F
Save a file	CTRL+S
Create a new file	CTRL+N
Clear selected text	DEL

Close a dialog box; cancel the current operation	ESC
Display context-sensitive Help	F1
Confirm the current edit in a Calendar appointment or Notepad page	F2
Search for text	F3
Set an alarm while creating or editing a Calendar appointment or meeting	F5
Specify a program to run while creating or editing a Calendar appointment or meeting	F6
Set cost codes while creating or editing a Calendar appointment or meeting	F7
Make a Calendar appointment or meeting confidential/not confidential	F8
Specify a repeating appointment while creating or editing an appointment	F9
Insert a new entry	INS
Cut selected text in any edit box to the Clipboard	SHIFT+DEL or CTRL+X
Paste information from the Clipboard	SHIFT+INS or CTRL+V

### **Editing keys**

You can use the following keys to move the insertion point in text boxes and other editable areas, such as Notepad text pages.

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

## Mouse Shortcuts

You can use mouse shortcuts for Organizer functions and commands.

### **Shortcut**

Go back to the last page you were on

Turn to the back of the notebook

Turn to the front of the notebook

Turn to the front of a section

Turn to the end of a section

In a text editing area, insert the current time

In a text editing area, insert the current date

In a text editing area, insert the current day and date

### **Function**

CTRL+Click the section tab

Click the right edge of the notebook

Click the left edge of the notebook

Click the section tab

SHIFT+Click tab

SHIFT+Click clock

SHIFT+Click today's date

CTRL+SHIFT+Click today's date





## Saving an Organizer File

You can save an Organizer file to the drive and directory you specify. You can:

- Save a new file
- Save a previously saved file
- Save a file to a different name or location
- Save a file automatically
- Create a back-up file

**Note** If you make changes and you don't want to save them, choose File/Revert to Saved. Then confirm that you don't want to save your edits. If you want to secure your file with a password, see [Using Passwords](#).

### To save a new file

After you've finished entering information in a new Organizer file, you can choose a filename and save it.



1. Choose File/Save .

The Organizer displays the File Save As dialog box.

**Note** Don't use the Save As dialog box to save your Organizer file if you opened it by user name. (If you opened the file by user name, your name appears in the Title Bar.) The Organizer saves your file automatically.

**Note** To copy your Organizer file to a laptop computer, see [Using the Organizer on a Laptop](#).

**Tip** The Organizer displays the default drive and directory under the filename. If you select a different drive and/or directory for **Directories**, the default drive changes. To save the file to another drive or directory, select the desired drive and directory or type the full pathname in the **File** text box.

2. Type a filename in the **File** text box. You can type up to eight characters.

**Note** The Organizer automatically adds .ORG as the extension to the file.

3. Choose OK.

**Note** If this file already exists with the name you specify, the Organizer lets you choose whether or not to overwrite the existing file.

### To save a previously saved file



- Choose File/Save .

The Organizer saves any changes.

### To save a file to a different name or location

You might want to save a file to a different directory, or to a different filename in the same directory.

1. Choose File/Save As.

The Organizer displays the File Save As dialog box.

2. If you're saving the file with a new filename, type the name of the file to save to.
3. If you're saving the file to a new location, change to the desired drive or directory.
4. Choose OK.

**Note** If this file already exists, the Organizer lets you choose whether or not to overwrite it.

### **To automatically save a file**

You can have the Organizer automatically save the changes you make to your file as you work.

1. Choose Options/Preferences.

The Organizer displays the Preferences dialog box.

2. Select the option you want and choose OK.

#### **After each change**

Automatically saves after every edit or update you make.

#### **Every x minutes**

Automatically saves your changes after the specified amount of time. Select "Confirm save" if you want to confirm each save.

#### **Only when told**

Saves your file only when you select File/Save. If you try to close a file without saving your changes, the Organizer lets you choose whether or not to save your edits.

### **To create a back-up file**

Whenever you save your file, the Organizer can automatically create a back-up copy for you.

1. Choose Options/Preferences.
2. Select "Create backup" and choose OK.

Every time you save your file, the Organizer creates a back-up file in the same directory with the same filename and the extension .BAK.

**Note** You can't select both "After each change" and "Create backup" for the same file.

**Note** Your administrator may have disabled the Create backup option. In this case, you'll see an error message.




## Using Help

Organizer provides on-screen Help for every function. You have easy access to information about procedures, commands, and shortcuts.

**Note** To keep both your current Organizer file and the Help file displayed at the same time, you can resize, move, tile, or cascade both windows.

There are several ways to get Help while using the Organizer:

- Position the mouse pointer on any of the SmartIcons or Toolbox icons on the left side of the screen and hold down the right mouse button to display a short explanation of that feature.
- Click the Help icon  to get context-sensitive Help specific to the section of the notebook you're in, or press F1 to get context-sensitive Help specific to the section of the notebook or dialog box you're in. If necessary, choose an appropriate highlighted Help topic to get more detailed Help.
- Choose Help from the menu to use indexed Help.

### To use a cross-reference

Many Help topics contain cross-references to other related Help topics. The cross-references are displayed in green (gray on a monochrome system) with a solid underline.

To display a highlighted Help topic:

- Position the mouse pointer on a cross-reference and click the mouse button. Or press TAB to select the desired cross-reference and press ENTER.

The Organizer displays a related Help topic.

### To use indexed Help

1. Choose Help.

The Help menu appears.

2. Choose the desired Help item.

#### **Index**

Displays Help topics for Organizer basics, How Do I?, Commands, Keyboard Shortcuts, Mouse Shortcuts, and Using Help. Choose a topic for further information. You can get to any part of the Organizer Help system from the Help Index.

#### **How Do I?**

Displays a list of Organizer functions and provides procedures for each one.

#### **Commands**

Displays the Organizer menu commands and provides information about each one.

#### **Shortcuts**

Provides information about keyboard and mouse shortcuts.

#### **Using Help**

Provides information about how to use Organizer Help.

#### **About Organizer**

Displays information about Lotus Organizer, including the release number, the serial number, the user name and company, and the copyright.

3. Click the desired Help topic, or press TAB to move to a topic and ENTER to select it.

The Organizer displays the Help topic.

### To use the Help buttons

When the Help window is active, you can use the Help buttons at the top of the window to display related Help topics.

**Note** These features vary, depending on which version of Windows you're running.

#### **Contents/Index**

Displays a list of Help topics, from which you can gain access to all parts of Help.

#### **Search**

Lists all the Help keywords for the Organizer. Enter a keyword or phrase in the text box, or select a keyword or phrase in the list box. Then choose **Search** or **Show Topics**, highlight the topic you want in the list box, and choose **Go To**.

#### **Back**

Displays the last Help topic you viewed. You can move back through each topic, one at a time. When you're at the first topic you viewed, the button is grayed out.

#### **History (Windows 3.1)**

Displays a list of the previous Help topics you viewed. You can choose any topic in the list to display that topic.

#### **Browse**

Displays the previous or next Help topic in a series of related topics. When you are at the first or last topic in a series, the button is grayed out. If the topic is not a part of a series, the buttons are not displayed.

#### **To use the Help menus**

When the Help window is active, the Help menu bar displays the available Help menus.

#### **File**

Opens Help files, prints Help topics, sets printer options, and closes Help.

#### **Edit**

Copies Help text to the Clipboard and adds annotations to Help text.

#### **Bookmark**

Places bookmarks in, and removes bookmarks from, Help topics. You use a bookmark to mark a specific Help reference.

#### **Help**

Switches control from Organizer Help to Windows Help and displays information about using Windows Help. To return to Organizer Help, choose **History** and then choose the desired Organizer Help topic, or choose Contents/Index.



## Using Passwords

If you want to keep your information confidential, you can put a password on your Organizer file. You can have up to three levels of password protection.

You can:

- Add a password
- Change a password
- Remove a password

### To add a password

1. Choose File/Passwords .

The Organizer displays the Passwords dialog box.

2. Type a password for each level of security you want.

Press TAB to move between the password fields.

**Note** As you type a password, it is duplicated in each field. If you want to have a separate public and/or read-only password, press TAB to move to the appropriate field and type the new password.

#### **Private**

Allows you to read and edit all information in the file, including entries that are marked Confidential.

#### **Public**

Allows you to read and edit all information in the file, except for entries marked Confidential. Confidential entries appear blank. You can create new entries and mark them Confidential.

#### **Read only**

Allows you to read all information in the file, except for entries marked Confidential. You cannot, however, edit anything in the file. If you leave this password blank, anyone can read your Organizer file.

3. Choose OK.

The Organizer displays the Retype Passwords dialog box.

4. To confirm your passwords, type them again.

Press TAB to move between fields.

5. Choose OK.

**Caution** After you put a password on a file, you have to type that password to access the file. If you don't know the password, the file won't open. You can leave one of the password levels blank if you wish to allow access to the file without a password.

**Note** All passwords are case-sensitive.

### To change a password

You can change one or all of your passwords at any time.

1. Choose File/Passwords.

**Note** Even if you only wish to change one password, you must retype all three.

2. Type the new passwords.
3. Choose OK.

4. Confirm your passwords.
5. Choose OK.

### **To remove a password**

You can remove your passwords at any time.

To remove all three passwords:

- Choose File/Passwords. To clear the passwords, leave them blank and choose OK. The Organizer asks you whether you want to reset all your passwords. Choose **Yes**.

To remove one or two passwords:

- Choose File/Passwords. Type the passwords you want to keep. Leave blank any passwords you want to remove. Then choose **Yes**. Retype the passwords you want to keep and choose OK.

## To Type a Password

You will need to specify a password for a file when you:

- Open a file with a password
- Open a file with an included section from a file with a password
- Save a file over an existing file with a password
- Include a section from a file with a password

**Note** All passwords are case-sensitive.

See also:

[Using Passwords](#)

## Setting Up Your Organizer File

You can change the color of your Organizer binder as well as specify the display of certain options.

**Tip** You can customize your notebook cover by typing text in the area at the bottom of the front cover. For example, you might type your name and company.

### To set preferences

1. Choose Options/Preferences.

The Organizer displays the Preferences dialog box.

2. Select the appropriate display options and choose OK.

#### **Clock & today's date**

Displays the clock and date calendar under the Toolbox.

#### **Animated page turn**

Simulates a turning page.

#### **Monochrome**

Optimizes the display for a monochrome system.

#### **Gray dialog boxes**

Displays all dialog boxes with a gray background.

**Note** The display settings are stored in your ORGANIZE.INI file and are specific to your system.

### To change the binder color

1. Choose Options/Display.
  2. Select the book cover color you want and choose OK.
- For more information, see [Customizing Section Tabs](#).



## Creating Appointments and Scheduling Meetings

You can use the Calendar section to manage your time and view your appointments and meetings at a glance.

### Using the Calendar, you can:

- [Create and manage appointments](#)
- [Set appointment and meeting duration using the TimeTracker](#)
- [Move appointments and meetings to a different day](#)
- [Create repeating appointments](#)
- [Schedule and change meetings](#)
- [Manually change the status of your attendees](#)
- [Find and view free time for a meeting](#)
- [Book a resource along with your meeting](#)
- [Manage meeting invitations](#)
- [Set alarms to remind you of upcoming appointments and meetings](#)
- [Run an application at a preset time](#)
- [Associate costs with your time](#)
- [Make appointments and meetings confidential](#)
- [Show information from other sections in the Calendar](#)
- [Customize your appointment and meeting options](#)

### To open the Calendar and select a date

1. Click the Calendar section tab.

The first page displays a calendar for the current year. Today's date is outlined in red (black on a monochrome system).

**Note** To display the calendar for a different year, click the year tabs to the left or right of the yearly calendar.

2. Click the date you want to turn to.

The Calendar opens to the selected date.

**Note** Make sure that your computer's time and date are set correctly. You can do this by selecting the Date/Time icon in the Windows Control Panel, or by using the DOS TIME and DATE commands.

**Tip** Another way to open the Calendar section to today's date is to click today's date.

### To change Calendar views

When your Calendar is open to an appointment page, you can choose the view you want by clicking the view icon below the Toolbox.

#### View Icon



#### Displays



One day per page



One work week per two pages



One full week per two pages

One full week per page

## Creating an Appointment

In the Calendar section you can:

- Create appointments
- Delete appointments
- Edit appointments

When you create an appointment in the Organizer, you just click the day and time and type the text.

**Tip** For information on scheduling meetings, see [Scheduling a Meeting](#).

### To create an appointment

1. Click the day for the appointment.


The Organizer displays all the time slots for that day. Use the scroll bar to move up and down the list.

2. Click the time you want the appointment to start.

The appointment window and icons appear. The TimeTracker appears in the center of the binder.


3. Type the text for your appointment.

4. Click  to confirm or

 to cancel.

The appointment appears in the Calendar.

Appointments are 60 minutes long unless you change their duration. For information, see [Setting Duration Using the TimeTracker](#).

**Note** When there is more information than can be displayed in a day,  appears at the bottom right section of the day. Click this arrow to display scroll bars so you can see all your appointments.

### Other ways to enter an appointment

You can use any of the following methods to enter an appointment:

- Press INS.


- Click  in the Toolbox.


- Choose Tools/Insert Appointment.

In each case, specify a date and time and then choose OK. Enter your appointment text.

### To delete an appointment

You can easily remove a canceled appointment from your Calendar.


- Drag the appointment to the Trash  and drop it in.

**Note** Once you delete an appointment you can retrieve it by choosing Edit/Undo  before you delete something else.

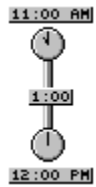
### To edit an appointment's text

1. Click the appointment text.

The Organizer displays the appointment window.

2. Make your changes and click  when you're done.

## Setting Duration Using the TimeTracker



You can use the TimeTracker to change the start and end times of an appointment (or a meeting) and to control an appointment's duration. The TimeTracker appears over the binder rings when you're entering an appointment.

### To set the duration of appointments

- To change the start time of an appointment, drag the top clock on the TimeTracker.
- To change the end time of an appointment, drag the bottom clock on the TimeTracker.
- To move the entire appointment to another time slot, drag the TimeTracker using the duration time in the middle.

**Tip** For information on changing meetings, see [Scheduling a Meeting](#).

As you drag each part of the TimeTracker, the times move in 5-minute increments.

When you create or edit appointments, the TimeTracker displays red bars (black on a monochrome system) for any appointments you already have on that day. The current appointment appears in green (white on a monochrome system).

The TimeTracker does not allow you to move one appointment over another one. If you drag the TimeTracker past a red bar, your appointment automatically snaps into the next free time slot. You cannot inadvertently schedule conflicting appointments.

**Note** You can also change the default duration of all new appointments by choosing Options/Calendar and specifying the number of minutes for **Default duration**. You can change the default length of time slots by choosing Options/Calendar and specifying the number of minutes for **Time slots**.

### TimeTracker shortcuts

While dragging the middle of the TimeTracker:

- Hold down SHIFT to force the TimeTracker to move 30 minutes at a time.
- Hold down CTRL to move the TimeTracker within a 24-hour time slot. Normally, the TimeTracker only moves within work-day hours, which you can specify using Options/Calendar.
- Hold down SHIFT+CTRL to force the TimeTracker to move 30 minutes at a time within a 24-hour interval.

## Rescheduling an Appointment or Meeting

**To move an appointment from one day on your screen to another day that you can see on your screen**



- Drag and drop the appointment (or meeting) over its new day.

The appointment appears in the new day in the same time slot as before.

**Note** To *copy* an appointment to another day on the screen, hold down CTRL and drag the appointment to its new day.

**Tip** For information on changing meetings, see [Scheduling a Meeting](#).

**To move an appointment to a day that's not displayed**

1. Click  in the Toolbox.
2. Click the appointment you want to move.  
A bar appears beneath the magnet when it picks up the appointment.
3. Turn to the new day.
4. Click on the day to drop the appointment.  
The appointment appears on the new day in the same time slot as before.
5. Click  in the Toolbox to deselect



**Note** To *copy* an appointment to another day, hold down CTRL when you drop the appointment on its new day.

**Note** To move an appointment to another Calendar section, drag and drop it over the Calendar section tab. To make a copy, hold down CTRL when you drop the appointment.

## Working with Repeating Appointments


There are a number of ways you can work with repeating appointments. You can:

- Create a repeating appointment
- Change a repeating appointment
- Delete a repeating appointment
- Resolve conflicting appointments

**Note** You cannot schedule repeating meetings. In order to schedule a meeting, you must treat it as a single event. See [Scheduling a Meeting](#).

### To create repeating appointments

To create an appointment that repeats on a regular basis:

1. Create or edit an appointment.
2. Click .

The Organizer displays the Repeating Appointment dialog box.

3. Select the appropriate options.

#### When to make an appointment

Specify how often you want to repeat the appointment. For example, you could specify every week on Tuesday, every 2 months on the first of each month, or every month on the third Wednesday.

#### Start and end dates

Specify the period of time during which the appointments will happen. You can specify an end date or a specific number of days, weeks, months, and so on. You can also include weekends. The first appointment of the repeating group will appear on the selected date.

For example:

#### To repeat


Every Friday for 1 month  
Every first Tuesday of the month until 1994  
Every Monday and Wednesday for 3 months  
Every 10th of the month for a year

#### Specify

**Every** 1 Week(s) , **On the** Friday, **For** 1 Month  
**Every** 1 Month(s) [Days], **On the** 1st Tuesday, **Until** 01/01/1994  
**Every** 1 Week(s), **On the** Monday and Wednesday, **For** 3 Month(s)  
**Every** 1 Month(s) [Dates], **On the** 10th, **For** 1 Year(s)

You can select more than one day at a time for your repeating appointment. For example, to create an appointment on both Monday and Friday, select **Every** Week(s), then select Monday and Friday.

4. Choose OK and click  to confirm or

 to cancel.


**Note** In the appointment window, the upper left corner of the Repeating icon is red (black on a monochrome system) to indicate that this is a repeating appointment.

### To change a repeating appointment




You may want to change the text of a repeating appointment. For example, if you create a weekly meeting, you may want to record agenda items for the meeting as part of the appointment text each week.

In addition, you may want to change how often an appointment repeats, or the day on which it repeats.

### To change the text of a repeating appointment

1. Click a repeating appointment and enter any text changes you want to make.  
For example, you might want to add the name of another person who attends a weekly meeting.
2. Click  to confirm.  
The Organizer displays the Change Repeating Event dialog box.
3. Choose the appointments you want to change and choose OK.

### To change the way an appointment repeats

1. Click a repeating appointment.
  2. Click  to turn off the repeating option.
  3. Click  again.  
The Organizer displays the Repeating Appointment dialog box.
  4. Select the required repeating options and choose OK.
  5. Click .
- The Organizer displays the Change Repeating Event dialog box.
6. Select the appropriate option and choose OK.

#### **Just this one**

Changes the current appointment to the new settings.

#### **All**

Changes all the repeating appointments in the current group.

#### **All previous**


Changes the current and all previous appointments to the new settings.


#### **All future**

Changes the current and all future appointments to the new settings.

**Caution** Any links to the original appointments will be lost.

### To delete a repeating appointment

1. Drag and drop the repeating appointment in the Trash .
- The Organizer displays the Delete Repeating Event dialog box.
2. Select the appropriate option and choose OK.

**Note** You can use Edit/Undo  to reverse the deletion of the current appointment. However, if you delete all, all previous, or all future appointments, you cannot recover them.

### To resolve conflicting repeating appointments

When you create a repeating appointment, one or more of the generated appointments may conflict with an existing appointment. If this occurs, the Organizer displays the Conflicting Appointment dialog box. To resolve the conflict, do one of the following:

- Use the TimeTracker to change the appointment time.



- Change the date of the appointment.
- Choose **Find time** to automatically go to the next free time slot. Select "Include weekends" to find free time on Saturday and Sunday.
- Choose **Turn to** to display the selected day. Drag the dialog box so you can see the conflicting appointment. Then you can decide how you want to change it.
- Choose **Skip** to skip over the conflicting appointment and leave the original appointment.

**Note** If you choose **Cancel** while you're in the Conflicting Appointment dialog box, any changes you've made in the appointment window will be lost.

## Scheduling a Meeting


In the Calendar section you can:

- Schedule meetings
- Edit meetings
- Cancel meetings

When you schedule a meeting, you become the chairperson for that meeting. You begin by clicking the day and time, entering a description of the meeting, and setting the meeting duration just as you would when creating regular appointments. For information, see [Creating an Appointment](#).

The Organizer allows you to schedule meetings with groups of people. These people can be other mail users on your LAN or on other LANs.

### To schedule a meeting

1. Click the day and time you want the meeting to take place.
2. Set the meeting duration with the TimeTracker.  
For information, see [Setting Duration Using the TimeTracker](#).
3. Type the text for your meeting.  
This text appears in the meeting invitation sent to the people you invite. Use the first line of text to type the subject of the meeting.
4. Click  in the icon bar.
5. Log into your mail account, if you are prompted to do so, using your mail password.  
For information, see [Logging into Electronic Mail](#).  
The Schedule Meeting dialog box appears.
6. Choose the cc:Mail(TM) Directory, or public mailing lists, or private mailing lists from the list in the **Select from** field as the source from which you can select the names of your attendees. The names appear in the **Names** field.
7. Select the people (or resources) that you want to attend your meeting in one of the following ways:
  - Type the first few characters of the name in the **Add** field until the name you want appears, and then press ENTER.
  - Select the name from the list in the **Names** field, and then choose **Add**.
  - Double-click the name.

The names are added to the list in the **Attendees** field.

For information on booking a resource along with your meeting, such as a meeting room or equipment, see [Booking a Resource](#).

**Note** As chairperson, you may send a meeting invitation to an attendee at another post office. For information, see [Addressing a Meeting Invitation to Another Post Office](#).

As you do this, a time bar appears for each attendee, showing any time that the attendee has already booked. Booked time is shown in red (black on a monochrome monitor). The proposed meeting time is shown in green (gray on a monochrome monitor) as long as there is no conflict with attendees' booked time.

If you select an attendee and no time bar appears, that user is not set up to use the Organizer. However, he or she is in the list of attendees and will receive an invitation by mail. If a time bar appears, but the name is grayed-out, that person is an Organizer user whose Organizer file is temporarily not available.

The names of the people and resources you've selected for the meeting appear in the

**Attendees** box.

To remove a name you have already added, select the name and choose **Remove**.  
Choose **Clear All** if you want to delete all the names and start again.

**Note** An icon appears to the left of the names in the **Attendees** field, signifying the attendees' status. The Organizer automatically updates the status of your attendees so that you always know whether a particular person has accepted, declined, or delegated. As chairperson, you can manually change the status of your attendees by choosing **Status**. For further information and a list of the meeting-status icons, see [Manually Changing the Status of Your Attendees](#).


8. If the original time of the meeting clashes with time any of the attendees has already booked, you can change the meeting time manually with the TimeTracker, or you can change the date. For information, see [Setting Duration Using the TimeTracker](#).

Choose **Reset** if you want to revert to the original time of the meeting.

**Note** If you would rather have the Organizer find a suitable time, you can use the **Find time** option. For information, see [Finding and Viewing Free Time](#).

9. Choose OK.

10. Click  to confirm or

 to cancel.

After you confirm the meeting, you may need to log into your mail account again. Once you are logged in, a meeting invitation will be sent to the attendees, requesting that they attend your meeting.

### To move or change a meeting

As chairperson, you can edit a meeting in any way you want, just as you would edit any other appointment in your Calendar. You can change the start or end time, move the meeting to another day, or change the text associated with the meeting.

1. Click an existing meeting in your Calendar.
2. Edit the meeting.

3. Click  to confirm.

4. Choose **Yes** to send the changes to the attendees.

The edited meeting will appear in your Calendar, and once you are logged into your mail account, the attendees (and appointees) will be sent a meeting notice informing them of the changes.

If you changed the date or time, the meeting notice will also be sent to any attendees who declined or delegated the meeting at its original date or time.

When an attendee accepts, the appointment is automatically changed in his or her Calendar.

### To cancel a meeting

As chairperson of the meeting, you may delete the meeting from your Calendar, thus canceling it completely.

1. Drag the meeting to the Trash.

A warning dialog box appears.

2. Choose **Yes** to delete the meeting.

After you delete the meeting, you may need to log into your mail account. Once you are logged in, the Organizer sends a meeting notice to all the attendees who did not decline

the meeting, informing them that the meeting has been canceled. When they accept, the meeting is removed from their Calendars automatically.


cc:Mail is a trademark of cc:Mail, a subsidiary of Lotus Development Corporation.

## Finding and Viewing Free Time

When you schedule a meeting, you can see all the time bars of the attendees in the Schedule Meeting dialog box, and you can set the meeting time and duration manually with the TimeTracker. For information, see [Setting Duration Using the TimeTracker](#). If you cannot find a suitable time on the date you suggested, select a different day and redisplay the attendees' time bars for that day. If you would rather have the Organizer find a suitable time, you can use the **Find time** option.


**Note** If you select an attendee and no time bar appears, that user is not set up to use the Organizer. If a time bar appears, but the name is grayed-out, that person is an Organizer user whose Organizer file is temporarily not available.

### To use the Find time option

1. Select all the attendees.
2. Choose **Find time**.  
Organizer will find the first suitable time.
3. Choose **Find time** again to find the next suitable time.  
Choose **Reset** to revert to the original date and time for the meeting.
4. Choose OK and click  to confirm.


### To view other people's free time

You can see what free time colleagues have available without going through the procedure of creating a new meeting.

1. Click .
2. Select the people whose free time you want to view.  
A time bar appears for each person, showing any time already booked.
3. Choose **Cancel** when you are finished.

## Manually Changing the Status of Your Attendees

As chairperson, you may manually change the status of your attendees from within the Schedule Meeting dialog box.

1. Click on an existing meeting and then click  in the icon bar to display the Schedule Meeting dialog box.
2. Select the name of the attendee and choose **Status**. The Edit Attendee Status dialog box appears.
3. Select the appropriate status from the dialog box. The icon in the upper right part of the box shows the currently selected status, as shown below.
4. Choose OK, and the icon next to the name of the attendee you selected will change to indicate his or her new status.

### **Icon**

### **Status**



Invited. The attendee has been sent a mail message inviting him or her to the meeting.



Attendee has accepted.



Attendee has declined.



Chairperson.



This person was invited but delegated an appointee.



Appointee invited (this person has been delegated by another user to attend in his or her place).



Appointee has accepted.



Appointee has declined.

## Addressing a Meeting Invitation to Another Post Office

As chairperson, you may send a meeting invitation to an attendee at another post office (who is not in your cc:Mail Directory).

1. Type or select the name of the post office, and then choose **Add**, or double-click the name.

The Post Office Addressing dialog box appears.

2. Type your attendee's unique user name.

**Note** You should be very careful when you type the name because it cannot be validated by cc:Mail. If you make a mistake, the message will be returned to you as undeliverable.


3. Choose OK, and the attendee's name will be added to your list of attendees.

**Note** The attendee's time bar will not appear because cc:Mail will not be able to access his or her Calendar.

## **Booking a Resource**

In addition to inviting people to a meeting, you can book necessary resources such as a meeting room or equipment. An Organizer file can be created for each resource and the Calendar section used to book its time. Any booking requests made to a resource are immediately entered into its Calendar if the time slot is available.

### **To book a resource**

1. Create an appointment and click .
2. Select all the attendees.
3. Select any resources needed for the meeting.
4. Choose OK.



## Managing Meeting Invitations

When another user schedules a meeting with you, he or she becomes the "chairperson" for that meeting, and you will receive a meeting invitation in your Inbox. You can recognize meeting invitations by the "Invite:" at the beginning of the subject line. You may respond to meeting invitations by:

- Accepting a meeting invitation
- Declining a meeting invitation
- Delegating a meeting invitation

If you have already accepted a meeting invitation, you may:

- Request a meeting change
- Delete a meeting from your Calendar

If the chairperson decides to change or cancel a meeting you have already accepted, you may:

- Receive a changed-meeting notice
- Receive a canceled-meeting notice

As chairperson of a meeting, you receive responses to meeting invitations from your attendees, which appear in your Inbox as mail messages. You may:

- Receive decline responses
- Receive delegation responses

**Note** You won't normally receive meeting responses from attendees who accept your meeting invitation. (Resources can be set up to accept automatically if the time you selected is available.) Instead, the status icon next to the attendee's name in the Schedule Meeting dialog box changes automatically. To view a table of the status icons, see [Manually Changing the Status of Your Attendees](#).

As chairperson, you may also receive requests for changes to existing meetings from your attendees. You may respond by:

- Accepting proposed-meeting-change responses
- Declining proposed-meeting-change responses

### To accept a meeting invitation

1. Go to your cc:Mail Inbox.
2. Open the meeting invitation in your cc:Mail Inbox.
3. Read the text item to find out what the meeting is about.
4. Launch the .ORS file attachment.

**Note** Whether you do this by double-clicking the attachment, or by SHIFT+double-clicking, depends on how you have set your cc:Mail preferences.

The Meeting Invitation dialog box appears. It tells you:

- Who is requesting the meeting
- The time and duration of the meeting
- The purpose of the meeting
- The other attendees
- Any resources, such as the conference room where the meeting is held

**Note** You may also receive a "changed-meeting notice" if the chairperson makes any changes to an existing meeting. In that case, the Changed Meeting dialog box will

appear. You can recognize changed-meeting notices by the "Change:" at the beginning of the subject line. Launch the .ORS file attachment, and respond in the same manner as above.

**Note** You may have responsibility for more than one Calendar. For example, if you are an assistant scheduling appointments for an executive, you may receive meeting invitations forwarded by the executive.

When you process a forwarded invitation, the Organizer asks you whether you want to apply the invitation to your own Organizer file. Choose **No** to select the appropriate user's Organizer file instead. You'll have to know the user's password.

**Note** cc:Mail for Windows, Version 2.0, offers automatic forwarding.

5. Choose **Turn to** to display the day in your Calendar for which the meeting is scheduled to see what other commitments you have. The Meeting Invitation dialog box remains visible.
6. Choose **Defer** to temporarily go to your Calendar. This option allows you to resolve a conflict of appointments at the time of the proposed meeting by changing any existing appointments or meetings. When you have finished making changes, choose File/Resume Deferred Meeting to return to the Meeting Invitation dialog box to accept the meeting.
7. Choose **Accept**.

When you accept the meeting, it is automatically entered into your Calendar.

### **To decline a meeting invitation**


1. Choose **Decline** from the Meeting Invitation dialog box.  
The Decline Meeting dialog box appears.
2. Type your reason for declining the invitation.
3. Choose OK.  
The Organizer sends a decline response to the meeting chairperson.

### **To delegate a meeting invitation**

1. Choose **Delegate** from the Meeting Invitation dialog box.  
The Delegate To dialog box appears so that you can select your replacement to attend the meeting.
2. Select the name of the person to whom you wish to delegate the responsibility of attending the meeting.
3. Choose OK.  
The delegate-reason dialog box appears.
4. Type your reason for delegating the invitation.
5. Choose OK.  
The Organizer forwards the meeting invitation to the person you delegated, with your reason for delegating added, and sends a meeting response to the chairperson.

### **To request a meeting change**

If you have already accepted a meeting, but then wish to change the meeting time, you first must get the approval of the meeting chairperson.

1. Change the time of the meeting in your own Calendar.
2. Click  to confirm.

The appointment appears unaltered in your Calendar, but a counterproposal will be sent to the chairperson requesting the change. If it is accepted, each attendee, including yourself, will be sent a meeting notice suggesting the change. If it is declined, you will be sent a meeting response stating the reason.

### **To delete a meeting from your Calendar**

If you have already accepted a meeting, but then are unable to attend after all, you can delete the meeting from your Calendar.

**Note** Once you have confirmed your action, you cannot undo it.

1. Drag the meeting to the Trash.  
The Organizer asks you to confirm.
2. Choose **Yes** to delete the meeting.  
The Decline Meeting dialog box appears.
3. Type your reason.
4. Choose OK.  
The chairperson will be sent a decline response.

### **To view decline and delegation responses**

As chairperson of the meeting, you receive decline and delegation responses from your attendees. You can recognize them in your Inbox by the "Decline:" or "Delegate:" at the beginning of the subject line. You may then wish to reschedule the meeting, cancel it, or change the attendees. For information, see [Scheduling a Meeting](#).

1. Go to your cc:Mail Inbox.
2. Open the meeting response.

The Organizer displays a text message indicating who has declined the meeting and the reason for doing so, or who has delegated, the reason for doing so, and the person who has been delegated.

**Note** You won't normally receive meeting responses from attendees who accept your meeting invitation. (Resources can be set up to accept automatically if the time you selected is available.) Instead, the status icon next to the attendee's name in the Schedule Meeting dialog box changes automatically to show that he or she has accepted. To view a table of the status icons, see [Manually Changing the Status of Your Attendees](#).

### **To accept or decline proposed-meeting-change responses**

As chairperson of the meeting, you also receive meeting responses from your attendees. You can recognize them in your Inbox by the "Counter:" at the beginning of the subject line.

1. Go to your cc:Mail Inbox.
2. Open the meeting response.
3. Launch the .ORS file attachment.  
The Proposed Meeting Change dialog box appears. It tells you:
  - Who is requesting the meeting change
  - The time and duration of the proposed meeting
4. Choose **Turn to** to display the day in your Calendar for which the meeting is scheduled to see what other commitments you have. The Proposed Meeting Change dialog box remains visible.
5. Choose **Defer** to temporarily go to your Calendar. This option allows you to resolve a conflict of appointments at the time of the proposed meeting by changing any existing appointments or meetings. When you have finished making changes, choose

File/Resume Deferred Meeting to return to the Proposed Meeting Change dialog box.

6. Choose **Accept**.

The Organizer automatically enters the change into your Calendar and sends your attendees a meeting response suggesting the change.

**or**

Choose **Decline**.

The Organizer sends a meeting response declining the proposed change to the attendee who suggested the change.

## Setting Alarms for Appointments and Meetings

You can set your alarm to sound up to 4 hours before an appointment (or meeting). When an alarm rings, it can play one of a number of different tunes as well as display an appointment message.

**Note** If the Organizer is minimized but still running when the alarm rings, a message appears over other applications and the selected tune sounds.

1. Create or edit an appointment.

2. Click .

The Organizer displays the Alarm dialog box.


3. If you want a tune to play as the alarm, select **Tune**.

4. Select the tune you want to sound as an alarm by clicking the down arrow to see the selections and highlighting a tune.

**Note** If you do not want to hear the sample tune, deselect "Sample tune."

5. Specify how many minutes before the appointment the alarm is to ring.

6. Choose OK and click  to confirm or

 to cancel the appointment.

**Note** In the appointment window, the upper left corner of the Alarm icon is red (black on a monochrome system) to indicate that the alarm is set. To turn off an alarm, click this icon.

## Running an Application at a Preset Time

You can use the Calendar section to run a particular application at a preset time. For example, you might want to run a back-up batch file at 5:30 on a Friday afternoon or load a spreadsheet to prepare for a sales meeting.


1. Create or edit an appointment.

2. Click .

The Organizer displays the Run Program dialog box.

3. Choose **Browse** to locate the required file, or specify the full path and filename. You can run both Windows and DOS applications.

4. Choose OK and click  to confirm or


 to cancel.

**Note** In the appointment (or meeting) window, the upper left corner of the Run Program icon is red (black on a monochrome system). To turn off the Run command, click this icon.

## Setting Cost Codes for Appointments and Meetings

By setting cost codes for appointments (or meetings), you can track the costs associated with particular appointments.

Once you specify a cost code, you can export this information along with the appointment text and time to another application for analysis. For example, you could set up a spreadsheet that produces billings for clients.

1. Create or edit an appointment.
2. Click .

The Organizer displays the Cost Codes dialog box.

3. Specify a **Customer Code** and **Cost Code**.

**Tip** For example, you can associate all of your client meetings with a specific cost per hour of service. You would enter cost codes when setting up appointments by entering your client's name (such as A&Z Hardware) in **Customer Code** and entering a specific billing fee (such as 25 for \$25 per hour) for that customer in **Cost Code**.

4. Choose OK and click  to confirm or




to cancel.


**Note** In the appointment window, the upper left corner of the Cost Codes icon is red (black on a monochrome system). To turn off the cost codes, click this icon.


**Tip** To customize the field names **Customer Code** or **Cost Code**, choose Options/Calendar and specify your own cost-code names. For information, see [Customizing Your Calendar](#).

## Making an Appointment or Meeting Confidential

You can restrict the display and editing of certain appointments (or meetings) if your file has a private password. Access to confidential appointments is determined by what password (if any) you use to open the file. For information, see [Using Passwords](#).

1. Open a file with a private password or choose File/Passwords to create a private password.
2. Create or edit an appointment.
3. Click .

4. Click  to confirm your appointment or

 to cancel.

**Note** In the appointment window, the upper left corner of the Confidential icon is red (black on a monochrome system). To turn off the appointment's confidentiality, click this icon.



## Showing Information from Other Sections in the Calendar

In your Calendar, you can display entries from the To Do, Planner, and Anniversary sections to give you a view of all your daily commitments.

Information displayed from another section appears at the top of a day in your Calendar, above any appointments (or meetings).

### To display information from other sections

1. Choose Options/Calendar.
2. Choose **Show**.  
The Organizer displays the Calendar Options (Show) dialog box.
3. Click each section that contains entries you want to show in the Calendar.
4. Choose OK twice.

**Note** If the Calendar view does not have enough space to show all the day's information, use the view icons below the Toolbox to change to the day-per-page view



## Customizing Your Calendar

### To set up the Calendar to suit your own personal way of working

1. Select Options/Calendar.

The Organizer displays the Calendar Options dialog box.

2. Choose the settings you want.

#### **Work day**

Sets the start and end times of your work day to the nearest hour. For example, if your work day is 9 AM to 6 PM, the Organizer looks for time slots between 9 AM and 6 PM when you choose **Find time**. For more information, see [Setting Duration Using the TimeTracker](#). To override this setting while creating or editing an appointment (or meeting), scroll your time-slot list and click the appropriate time.

#### **Time slots**

Controls how long each time slot is in minutes. To override this setting while creating or editing an appointment, use the TimeTracker to change an appointment's start or end time.

#### **Default duration**

Specifies the default length of an appointment in minutes. To override this setting while creating or editing an appointment, use the TimeTracker to change an appointment's start or end time.

#### **Show lines**

Specifies how many lines of text are displayed for each appointment. You can fit more appointments within a day if you set **Show lines** to 1 or 2 lines. To display the hidden lines, click the appointment.

#### **Show icons/end time**

Displays the appropriate appointment icons and end time for the appointment next to the appointment text.

#### **Include weekends**

Allows repeating appointments and the **Find time** button in the Conflicting Appointment dialog box to book time on Saturday and Sunday.

#### **Cost code names**

Specifies the names of the fields in the Cost Codes dialog box. For example, you may prefer Reference Number to Customer Code, or Rate to Cost Code.

The "&" in the field-name text denotes the next character as the keyboard accelerator key. If you want to access this field using the keyboard, the accelerator allows you to choose the field. For example, if you enter &CUSTOMER CODE, ALT+C selects the field.

#### **View**

Selects the Calendar view you want to display: "Day per page," "Work week," "Week," or "Week per page." While you're in the Calendar, you can use the icons below the Toolbox to change the current view.

#### **Show**

Selects the section that has the information you want to show in your Calendar. You can choose any combination of To Do, Planner, and Anniversary sections.

#### **Automatically accept meeting notices**

Automatically accepts meeting invitations and notices and writes them in your Calendar. If you select this option, you will not have the choice of declining or delegating meetings. Anyone can book your time.

## To Resolve Conflicting Appointments and Meetings

When you create a repeating appointment or move an appointment (or meeting), it may conflict with an existing appointment. If this occurs, the Organizer displays the Conflicting Appointment dialog box. To resolve the conflict, do one of the following:

- Use the TimeTracker to change the appointment time.
- Change the date of the appointment.
- Choose **Find time** to automatically go to the next free time slot. Select "Include weekends" to find free time on Saturday and Sunday.
- Choose **Turn to** to display the selected day. Drag the dialog box so you can see the conflicting appointment. Then you can decide how you want to change it.
- Choose **Skip** to skip over the conflicting appointment and leave the original appointment.

**Note** If you choose **Cancel** while you're in the Conflicting Appointment dialog box, any changes you've made in the appointment window are not saved.

## To Change or Delete a Repeating Appointment or Event

- Select the appropriate option and choose OK.

### **Just this one**

Changes or deletes the current appointment or event.

### **All**

Changes or deletes all the repeating appointments or events in the current group.

### **All previous**

Changes or deletes the current and all previous appointments or events.

### **All future**

Changes or deletes the current and all future appointments or events.

**Caution** If you are changing the way a repeating appointment repeats, any links to the original appointments will be lost.

## **Logging into Electronic Mail**

In order to schedule a meeting over the network, you need to log into cc:Mail.

1. Enter your cc:Mail post office path.
2. Enter your unique log-in name.
3. Enter your mail password.
4. Click OK.

## To Create New Appointments and Meetings

The New Appointment dialog box allows you to open your Calendar section to a selected date and time, and immediately enter the text for a new appointment (or meeting).

- Select the date for the appointment.
- Use the TimeTracker to set the appointment time and duration.
- Choose **Find time** to automatically go to the next free time slot. Select "Include weekends" to find free time on Saturday and Sunday.
- Choose **Turn to** to display the selected day. Drag the dialog box so you can see the day in your Calendar.
- Choose OK to go to the selected day and time, and begin typing the text for your new appointment.

**Note** For more information, see [Creating an Appointment](#) or [Scheduling a Meeting](#).

## Using the Organizer on a Laptop

If you do not use the group-scheduling features of Lotus Organizer, Release 1.1, or if you do not permit other users to access your Organizer file on a network, you can use your Organizer file on a laptop computer simply by copying your Organizer file to the laptop.

Read this Help topic if you use the Organizer for group scheduling on the network, and you want to use the same Organizer file on a laptop computer.

Lotus Organizer, Release 1.1, is designed to be easily used on a network. However, you can copy your Organizer file to a laptop computer if you want use it when you are away from the network. Although you can't schedule new meetings or edit existing meetings with Organizer while away from the network, you can still use all the personal information manager functions. Invitations addressed to you in your absence will be saved for your return.

**Note** You can also view your meeting invitations or notices with cc:Mail Remote.

### To set up your Organizer files for network-laptop transfer

To use your Organizer file on a laptop as well as on the network, you need to do some preparatory work before you copy the file for the first time:

1. Find your Organizer file on the network. (All the Organizer files for group scheduling are kept in a shared directory on the network.) Your administrator will tell you the path and filename of your file.

**Note** If an administrator is not available, you can find the file yourself by following the steps in "To find a file on the network" in this Help topic.

For example, if your name is John Valentine, the path to your Organizer file might be:

N:\ORGANIZE\USERS\VALENTIN.ORG

2. Decide how you'll be copying the file:
  - Direct copy to a laptop directly connected to the network (either connected by a cable or by docking)
  - Diskette copy, first to a diskette, and then to the laptop
3. If you've not already done so, run the WORKSTN.EXE program or the INSTALL.EXE program to copy the Organizer program files to your laptop computer. WORKSTN.EXE runs from a network drive. INSTALL.EXE runs from the Install diskette.
  - Use WORKSTN.EXE if you'll be using "direct copy."
  - Use INSTALL.EXE if you'll be using "diskette copy."

Your administrator can help you with this. If no administrator is available, you can find WORKSTN.EXE by following the steps in "To find a file on the network" in this Help topic.

4. Run the Organizer on your laptop and create a new Organizer file. Store the file on the local drive of your laptop.

For example, if your name is John Valentine, your Organizer file on the laptop might be:

C:\ORGANIZE\ORGFILS\VALENTIN.ORG

When you are finished, you should have two Organizer files. The one on the network is the "working copy" Organizer file you use every day. The one on the laptop is empty.

Now you're ready to transfer the working copy of your Organizer file from the network to your laptop and back again.

#### Direct copy

To copy the Organizer file to the laptop, follow the instructions in the procedure "Direct copy: network to laptop" below.

To copy the file back to the network, follow the instructions in the procedure "Direct copy:

laptop to network" below.

### **Diskette copy**

To copy the Organizer file to a diskette and then to the laptop, follow the instructions in the procedure "Diskette copy: network to laptop" below.

To copy the file back to the network, follow the instructions in the procedure "Diskette copy: laptop to network" below.

### **Direct copy: network to laptop**

1. Make sure that the copy of your Organizer file on the laptop (for example, C:\ORGANIZE\ORGFILERS\VALENTIN.ORG) is **not** set to read-only. Select the file in Windows File Manager. Choose File/Properties. Deselect Read Only under Attributes.
2. In Windows File Manager, copy your Organizer file from the shared network directory to the local drive on the laptop.

For example, copy:

N:\ORGANIZE\USERS\VALENTIN.ORG

to

C:\ORGANIZE\ORGFILERS\VALENTIN.ORG

3. Make the copy remaining on the network (for example, N:\ORGANIZE\USERS\VALENTIN.ORG) read-only by choosing File/Properties from the File Manager. Select Read Only.

This ensures that the file isn't modified while you are away from the network, and that meeting invitations and notices are saved for your return.

4. Run the Organizer. It doesn't matter whether your Organizer file opens automatically or whether you open an untitled Organizer file.
5. Choose File/Open.
6. Select "Files" and "Open automatically."
7. Open your Organizer file on the laptop local drive. For example:

C:\ORGANIZE\ORGFILERS\VALENTIN.ORG

8. Exit the Organizer.

**Note** If your Organizer isn't enabled to schedule meetings when you are on the network, you can skip the following steps.

9. In Windows File Manager, go to the Organizer directory on the laptop local drive. For example:

C:\ORGANIZE

10. Select the file ORGNET.DLL. Choose File/Rename. Rename the file SAVENET.DLL.
11. Select the file PORTABLE.DLL. Choose File/Rename. Rename the file ORGNET.DLL.

You can now disconnect your laptop from the network and use the Organizer as a stand-alone personal information manager.

### **Direct copy: laptop to network**

To use your Organizer file on the network again, you must reverse the process:

**Note** If your Organizer is not enabled to schedule meetings when you are on the network, you can skip the first three steps.

1. In Windows File Manager, go to the Organizer directory on the laptop local drive. For example:

C:\ORGANIZE



2. Select the file ORGNET.DLL. Choose File/Rename. Rename the file PORTABLE.DLL.
3. Select the file SAVENET.DLL. Choose File/Rename. Rename the file ORGNET.DLL.
4. Make sure that the Organizer file in the network directory (for example, N:\ORGANIZE\USERS\VALENTIN.ORG) is **not** set to read-only. In Windows File Manager, select the Organizer file. Choose File/Properties. Deselect Read Only.
5. Copy your Organizer file from the local drive on the laptop to the shared network directory.

For example, copy:

C:\ORGANIZE\ORGFILERS\VALENTIN.ORG

to

N:\ORGANIZE\USERS\VALENTIN.ORG

6. Make the copy on the local drive read-only by selecting the file and choosing File/Properties from the File Manager. Select Read Only.
7. Run the Organizer. It doesn't matter whether your Organizer file opens automatically or whether you open an untitled Organizer file.
8. Choose File/Open.
9. Select "Names" and "Open automatically."
10. Select your name from the Names list and choose OK.

You're now back on the network, and you can use the Organizer to view other users' free time, schedule meetings, and so on.

### **Diskette copy: network to laptop**

This procedure explains how to copy your Organizer file to a laptop that is not connected to the network:

1. In Windows File Manager, copy your Organizer file from the shared network directory to a diskette.

For example, copy:

N:\ORGANIZE\USERS\VALENTIN.ORG

to

A:\VALENTIN.ORG

2. Make the copy remaining on the network (for example, N:\ORGANIZE\USERS\VALENTIN.ORG) read-only by choosing File/Properties from the File Manager. Select Read Only.

This ensures that the file isn't modified while you are away from the network, and that meeting invitations and notices are saved for your return.

3. Copy the file from the diskette to the local drive on the laptop.

For example, copy:

A:\VALENTIN.ORG to

C:\ORGANIZE\ORGFILERS\VALENTIN.ORG

### **Diskette copy: laptop to network**

To use the file on the network again:

1. Make sure that the Organizer file in the network directory (for example, N:\ORGANIZE\USERS\VALENTIN.ORG) is not set to read-only. Select the Organizer file. Choose File/Properties. Deselect Read Only.
2. Copy your Organizer file from the local drive on the laptop to a diskette.

For example, copy:

C:\ORGANIZE\ORGFILES\VALENTIN.ORG

to

A:\VALENTIN.ORG

3. Copy the file from the diskette to the shared network directory.

For example, copy:

A:\VALENTIN.ORG

to

N:\ORGANIZE\USERS\VALENTIN.ORG

### **To find a file on the network**

Follow these steps if you need to find your Organizer file (or WORKSTN.EXE) on the network, and an administrator is not available to help.

1. In Windows, start the File Manager application.
2. Select one of the network drives indicated by any letter other than a, b, c, or d.  
The name of the drive may give you some idea of its contents. For example, a drive called N:\USERFILES would be a good place to start your search.
3. Choose File/Search.
4. Select Search All Subdirectories (Windows 3.1) or Search Entire Disk (Windows 3.0).
5. Type an asterisk (\*), the first six characters of your last name, another asterisk, and then .ORG (for example: \*VALENT\*.ORG).

**Note** For WORKSTN.EXE, type WORKSTN.EXE.

File Manager may take a minute or two to search the disk drive. If it finds the file, it displays the Search Results box.

6. Repeat this procedure with other drives until you find your file.

## Maintaining a To Do List

The tasks on your to do list form the core of your weekly and long-range planning. Lotus Organizer provides a section devoted to managing these tasks. The To Do section can help you keep track of what you have to do and when you have to do it.

As your ideas and projects evolve, you can add, update, or delete To Do tasks to reflect these changes. As you proceed, you can keep track of which tasks are done and which are pending. You can also have your To Do tasks displayed in the Calendar, without having to retype or copy them there.

You can easily enter and edit tasks in your To Do section. The tasks you enter in your To Do list are automatically sorted and displayed according to date and priority.

### In the To Do section, you can:

- [Create To Do tasks](#)
- [Edit tasks](#)
- [Change start and due dates](#)
- [Prioritize tasks](#)
- [Mark tasks completed](#)
- [Move a task between To Do sections](#)
- [Show To Do tasks in your Calendar](#)

**Note** You can also keep separate To Do sections for different projects you're working on. For information, see [Changing a Section](#).

## Entering a To Do Task

You can enter as many tasks as you like in your To Do section. Your To Do list displays all your tasks on a page and, if necessary, creates more pages that you can turn to.

### In the To Do section you can:

- Enter To Do tasks
- Delete To Do tasks that you've completed or that you no longer need
- [Change the start and due dates](#)
- [Prioritize tasks](#)
- [Mark tasks as completed](#)

### To enter a To Do task

1. Click the To Do section tab.  
The Organizer displays the first To Do page.
2. Click the To Do page.  
The Organizer displays the To Do dialog box.
3. Type a description of the task.
4. Specify start and due dates for the task if needed. The Organizer automatically displays today's date for these dates unless you change them. You can type a date or choose a date from the pop-up calendar.
5. Select any of the following options.

#### Priority

Specifies a priority for the task. The Organizer automatically assigns a priority of 2. For information, see [Prioritizing a Task](#).

#### Completed

Specifies that a task has been completed. For information, see [Marking a Task Completed](#).


#### Confidential

Selects whether the task can be read or edited. Access to confidential tasks is determined by what password (if any) you use to open the file. For information, see [Using Passwords](#).


6. Choose OK.  
The task appears on the To Do page.

### Other ways to enter tasks

You can use any of the following methods to enter a task:

- Press INS.
  - Click  in the Toolbox.
  - Choose Tools/Insert Task.
- In each case, type a description of the task and select the appropriate options.

### To delete a task

- Drag and drop the task into the Trash .

**Note** You can retrieve the deleted task by choosing Edit/Undo  before you delete

something else.

## **Editing a Task**

1. Click the task.

The Organizer displays the To Do dialog box.

2. Edit the task description or change any of the other options, as appropriate, or mark the task completed.
3. Choose OK.

## Changing Start and Due Dates

Each task is coded so you can see its status at any time. The following table describes how a task appears, based on its status.

<b>Color screen</b>	<b>Monochrome screen</b>	<b>Status</b>
Red	<b>Bold</b>	Overdue
Green	Plain text	Current
Blue	<i>Italics</i>	Future
Red line through task	Line through task	Completed

Tasks are sorted by date, then by priority. Every day the Organizer checks to see if any of your To Do tasks are overdue. Overdue tasks appear first, followed by current tasks and future tasks. Completed tasks appear at the bottom of your list.

### To change start and due dates

1. Create or edit a To Do task.
2. Specify start and end dates as appropriate. You can type a new date or choose a date from the pop-up calendar.
3. Choose OK.

## **Prioritizing a Task**

You can assign a priority to each task in your To Do list so you can easily see which tasks are most important. Tasks can have a priority of 1, 2, or 3, with 1 being the highest and 3 the lowest. The priority number appears next to the task.

1. Create or edit a To Do task.
2. Select a priority of 1, 2, or 3.
3. Choose OK.

**Note** You can also display your prioritized tasks by indenting them. Choose Options/To Do and select "Show priority/As indent."



## Marking a Task Completed

Your To Do list can be a valuable source of information even after you've completed a task. If you mark a task completed, it appears with a line through it at the end of the To Do list for the day you completed it. If you don't mark a task completed, it carries forward to the next day's date, when it will be updated as either overdue or still current.

**Note** If you display your To Do tasks, tasks not completed (current or overdue) will carry forward to the next day's date. For information, see [Showing To Do Tasks in the Calendar](#).

### To mark a task completed


1. Click a To Do task you've completed.  
The Organizer displays the To Do dialog box.
2. Select "Completed" and choose OK.

**Note** To hide your completed tasks, choose Options/To Do and deselect "Show completed tasks."

## Moving Tasks Between To Do Sections

You can keep more than one To Do section for different projects you're working on. For information, see [Changing a Section](#).

### To copy tasks between different To Do sections

1. Drag and drop the task onto the Clipboard in the Toolbox .

A page appears on the Clipboard.

2. Turn to the To Do section where you want to move the task.
3. Drag and drop the Clipboard on the page.

**Tip** You can also copy a task by holding down CTRL while you drag and drop the task on the tab of another To Do section.

**Note** To *move* a task to a different To Do section, pick it up with the magnet, then drag and drop it on the appropriate To Do section tab.

**Tip** You can easily print a list of completed tasks for a certain time frame to use as a status report. Create another To Do section (named, for example, "Status Report") and move your completed tasks to the Status Report section. Print the list of completed tasks to produce your status report.

## Showing To Do Tasks in the Calendar

If you want to see everything that you have to do on a particular day, you can have your To Do tasks displayed in your Calendar section. These To Do tasks appear at the top of their appropriate days, as specified by the start date.

**Tip** Showing tasks in the Calendar is especially useful if you have several To Do sections and you want to see the tasks from all the To Do sections combined in one place.

### To show To Do tasks in the Calendar

1. Choose Options/Calendar.

The Organizer displays the Calendar Options dialog box.

2. Choose **Show**.

The Organizer displays the Calendar Options (Show) dialog box.

3. Select the To Do section from the **Show entries from** list.

**Note** You can deselect a section name by clicking it again.

**Note** If you want to see all the tasks from all your To Do sections, be sure to select all To Do sections.

4. Choose OK twice.

Your To Do tasks from the section you selected are now displayed in the Calendar section. Any current or overdue tasks are displayed at the top of today's date in the Calendar.

**Note** If you display To Do tasks in your Calendar, you can turn from a task in the To Do section directly to the Calendar. Hold down SHIFT and click the task.

### Working with tasks in the Calendar

You can edit any To Do task that shows in the Calendar section. Just click the task, and the To Do dialog box appears.

You can also reschedule To Do tasks within the Calendar. Just drag and drop a task to a different day. The start and due dates automatically change to the new day. In the Calendar, you can also use the magnet in the Toolbox to move tasks to a day not on the screen.

**Tip** To see which tasks are completed each day, choose Options/To Do and select "Show completed tasks."

## Managing a Name and Address List

You can use the Address section to keep track of all your names, addresses, and phone numbers. You can find any personal or business contact quickly, no matter how big your Address section becomes.

### Using the Address section, you can:

- Enter and edit names and addresses
- Copy fields from existing records to create new ones
- Search for and quickly find any name and address, or filter a group of names and addresses
- Change the sort order
- Automatically dial phone numbers and keep a phone log
- Import information to your Address section
- Export address records to your word processor for a mail merge

## Entering and Deleting Names and Addresses

You enter information in the Address section in a series of fields. A field is a category of information such as Last Name. All the information you enter about one person (Title, First Name, Last Name, Address, Phone, Notes, and so on) is a record. For example, Faraday might be an entry in the Last Name field. All the information about Faraday makes up one record. You can add any number of names and addresses to the Address section.

This topic describes how to:

- Enter names and addresses
- Delete names and addresses
- Change address views
- Display records without blank pages

### To enter names and addresses

1. Click the Address section tab.

The Organizer displays the Address template.

2. Press TAB to move between the fields you want to use, and type the information you want in the Address template.

Use SHIFT+TAB to move back to a field. You can also click each field; however, be sure you highlight the entire field name so it disappears when you replace it with information. You don't need to enter information in all the fields. However, you may find some of the following fields useful:

#### **Title**

Type a title, such as Dr., Miss, Mr., Mrs., or Ms. Once you enter a title, you can select it from a list when you enter more records. Click the down arrow to the right of **Title** to select a title.

#### **Type**

Enter a type of contact, such as Employee or Customer. Once you enter a type, you can select it from a list when you enter more records. Click the down arrow to the right of **Type** to select from the list. This field is helpful if you want to filter your Address section to display only a specified group of records. For example, you can display just the names and addresses of your employees.

#### **User1 and User2**

Use **User1** and **User2** to enter additional information, such as the secretary's name or an alternate phone number. These fields are user-defined. However, the field names (**User1** and **User2**) won't change.

#### **Confidential**

Select "Confidential" if you want this record to be accessible only to users with the file's private password. For information, see [Using Passwords](#).

3. Choose **Insert**.


The Organizer turns the pages of the Address section to display the record you just entered.

**Note** The default sorting for the Address section is by last name. To sort the records in the Address section by company, zip code, or type of contact, see [Changing the Sort Order](#).


**Tip** To remove an unwanted entry from the **Title** or **Type** list, click the Address tab to display the Address template. Select the unwanted title from the list and press DEL.


### Other ways to enter records

You can use any of the following methods to enter a name and address:

- Press INS.
- Click  in the Toolbox.
- Choose Tools/Insert Address.

### To delete a record

- Drag and drop the record into the Trash .

**Note** You can retrieve the deleted record by choosing Edit/Undo  before you delete something else.

### To change address views

When your Address section is open to actual records, you can choose the view you want by clicking the view icon below the Toolbox, or by choosing Options/Address and selecting a view.

#### **View Icon**

#### **Displays**



page)

All fields: name, company, address, phone, fax and notes (one per



Address: name, company, address, phone, and fax (two per page)



Contact: name, company, phone, and fax (four per page)



Phone: name, company, and phone (six or more per page)

### To display records without blank pages

As you turn through your addresses, you may notice that an address starting with a new letter always begins at the top of a right hand page. This is exactly as you would keep addresses in a real address book and can result in blank space on address pages.

You can have all your addresses appear one after another without any blank space.

- Choose Options/Address and select "Continuous."

See also:

[Shortcuts for Entering Names and Addresses](#)

## **Editing a Record**

1. Click the record to be edited.

The Organizer displays the Address template, with the fields containing the information for that particular record.

2. Click the field you want to change, or use TAB to move between fields.
3. Edit the text.
4. Choose **Update**.

## Shortcuts for Entering Names and Addresses

A record in the Address section contains the name and address of a contact, as well as any other information you want to enter, such as phone and fax numbers.

You can use some of the following shortcuts to enter records in your Address section:

- Add contacts from the same company to avoid reentering the same company information
- Copy a field from one record to another
- Copy a record within an Address section
- Copy a record from one Address section to another

**Tip** If you need to enter a lot of records at one time, you might not want the Organizer to turn to the new record after every entry. To turn off this feature, choose Options/Address and deselect "Turn after Insert/Update."

### To add contacts from the same company

You can use this procedure to add a new contact at the same company to your Address section.

1. Click the Address section tab to display the Address template.
2. Type a title, first name, last name, and position.

**Note** The only required field is **Last Name**.

3. In the **Company Name** field, type the first word in the name of the company that already exists in the Address section. Note that this is case-sensitive.
4. Press TAB to go to the next field.

The Organizer displays the Similar Address Found dialog box.

5. If more than one company is listed, select the company you want.
6. Choose OK.

The Organizer automatically fills in the address, zip, and phone fields for the new record.

**Note** The Organizer doesn't copy the information in the **Extn**, **User1**, **User2**, or **Notes** fields.

7. Choose **Insert**.

### To copy a field to another record

You can use the Edit menu to copy and paste selected fields to other records.

1. Click a record that has fields you want to copy.  
The Organizer displays the Address template.
2. Click or TAB to the field to be copied, and select the text to copy.
3. Choose Edit/Copy.
4. Click the existing record where you want to paste the information, or click the Address section tab to display a new Address template.
5. TAB to the field where you want to paste the information.
6. Select the text to be replaced.
7. Choose Edit/Paste.
8. When you are done with the record, choose **Update** or **Insert**.

### To copy a record within an Address section

You might want to enter a new record that's very similar to another record you already have



in the Address section. You can save time by copying the record and then editing any specific fields, as needed.


1. Click the record you want to copy.
2. Choose Edit/Copy Special and then choose **All Fields**.
3. Choose **Cancel**.
4. Choose Edit/Paste.

The Organizer includes the new record in the Address section.

5. Click the new record to edit it.
6. Make any changes necessary to the record.
7. Choose **Update**.

### **To copy a record to another Address section**

**Note** For more information, see [Changing a Section](#).

1. Drag and drop the record to be copied over the Clipboard  in the Toolbox.

A page appears on the Clipboard.

**Note** To copy specific fields, hold down SHIFT as you drop information on the Clipboard and select the required format.

2. Drag and drop the Clipboard  over the destination Address section tab.

A copy of the record is added to the second Address section.

**Note** To quickly copy a complete record to another Address section, hold down CTRL while you drag and drop the address on the destination Address section tab.

### **To move a record to another Address section**

1. Click  in the Toolbox.

2. Click the address to be moved.


3. Turn to the destination Address section and click the letter tab or a page.

**Note** To quickly move a complete record to another Address section, drag and drop the address on the destination Address section tab.

## Finding Names and Addresses

You can quickly locate a specific record in the Address section using any of the following methods:

- As in any address book, use the letter tabs on the side of the Address section. For example, to find someone with the last name Monahan, click on the letter M. Then turn pages to find that particular name.

**Tip** To quickly display as many records as possible, click on the Phone view icon  below the Toolbox.

**Note** A letter tab that is grayed out contains no records. If you click ? (question mark), the Organizer displays the Address template. The ! (exclamation point) displays addresses with empty sort fields or numbers in the sort field.

- Use **Find** to locate a specific record.
- Use Edit/Search to search for a number of addresses that match specific text.
- Use **Filter** to extract a subset of your records.

### To find a specific record

1. Click the Address section tab.

The Organizer displays the Address template.

2. Click the field you want to match, or use TAB to move among fields.

For example, you might want to search for the record of a business contact, using the person's last name and the company name.

3. Type the text you want to find.

The Organizer looks for the first record that contains exactly the information you enter in the Address fields.

4. Choose **Find**.

- If the Organizer finds a matching record, it turns to the page with the first such record it finds.
- If no match is found, the Organizer displays a message.

**Note** If **Find** doesn't locate the exact record you want but finds a similar one, try **Filter**. Otherwise, go back and type more specific **Find** information.

### Finding text within an address

Whenever you search your Address section, the Organizer tries to match the information in the Address template.

The Organizer can find a record based on only partial text in a field. For example if you type **Bil** in the **First Name** field, you would get a match with **Bill** or **Billy**.

You can also find a record by typing \* followed by part of the text. For example, you may not remember a complete company name but you know that it has the word Steel in it. You can type **\*Steel** and choose **Find** to locate a record with the word Steel anywhere within the **Company Name** field.

### To search all Address records for specific text

**Note** You can search for text in any section in the Organizer.

1. Choose Edit/Search.
2. Choose Address for the section to search and any appropriate options.

#### **Case-sensitive**

Searches for the text exactly the way you type it.

**All**

Selects all sections in the Organizer file for the search.

**3. Choose Search.**

All matched records appear in the **Search results** list.

For example, you can search for the word **Bank** in your Address section, and the Organizer finds all addresses with **Bank** in any of the fields. This can consist of records containing a Last Name of Bank, a company such as Consolidated Bank, an address such as 1124 Bank Street, and any reference to Bank in the notes.

**4. Highlight the record you want to see in the Search results box and choose Turn to to display it.****5. To look at other records, choose Edit/Search and select another record from the list box.**

**Note** If you filter the Address section to display a subset of records, **Search** will only search the filtered records.

**To filter selected names and addresses**

You can select a subset of records from your Address section. For example, you might want to display all your clients from a certain company or all the records of companies in a particular zip code.

**1. Click the Address section tab.****2. Type the information that you want to match in the appropriate field.**

For example, if you specify certain records in the **Type** field as **Customer**, you can create an address subset of all customers. Or you can filter everyone by area code by typing a specific area code in the phone field. You can also select all addresses in Atlanta by typing **\*Atlanta** in the address field.

**Note** You can filter using more than one field. For example, you can filter for all customers in Atlanta by specifying **\*Atlanta** in the address field, and **Customer** in the **Type** field.

**3. Choose Filter.**

The Organizer creates a subset of records and displays the first record that matches what you specified.

**4. To further filter the records, click the Address section tab, specify additional fields, and choose Filter.**

For example, if you filtered all addresses in Atlanta, you could now filter for a specific zip code in that city.

**Note** When you filter the Address section, all operations (such as exporting, printing, or searching), use only the filtered records. The filter remains until you choose **Clear** or leave the Address section.

## Changing the Sort Order

The records in the Address section can be sorted by Last Name, Company Name, Zip, or Type (for example, Customer, Supplier, Employee).

The current sort field is displayed in bold on the Address template. As you change the sort field, the Organizer automatically updates the order of your records and highlights the letter tabs that now contain records.

### To change the sort order

1. Click the Address section tab to display the Address template.
2. Click the view icons below the Toolbox, or choose Options/Address and select a **Sort by** field.

#### **Sort by Icon**



#### **Sorts by**

Last Name. Any address without a last name is sorted by Company Name.



Company Name. Any address without a company name is sorted by Last Name.



Zip Code.



Type.

**Note** To see a description of each view, point to a view icon and click the right mouse button.

**Note** The ! (exclamation point) tab displays all the records in which the sort field is empty or contains numbers.

## Making Phone Calls

You can use the Organizer to dial any phone number that's in your Address section, your Notepad, or any other section.

If you have a Hayes®-compatible or autodial modem, you can automatically dial phone numbers. If you don't have a modem, you can still use the call log to time and keep a record of your phone calls.

This topic describes how to

- Make and log phone calls
- Track incoming and outgoing calls
- Dial frequently used numbers
- Change modem settings
- Troubleshoot modem operation

### To make a phone call

1. Drag and drop an address, or any entry containing a phone number, onto the Phone icon



in the Toolbox.

The Organizer displays the Dial dialog box, which contains the phone number you specified.

**Note** All the phone numbers in the record appear in the **Number** list. To choose an alternate number, click the down arrow and select the required number.

2. Select any appropriate options.

#### Prefix

Specifies the characters to be dialed before dialing a number. For example, you might specify 9 to get an outside line before dialing your number.

#### Use access code

Selects whether to use an access code if one is specified as an autodialer option.

#### Recall

Causes the modem to hang up for 75 milliseconds, then reconnect. You can use this option to access PBX features such as call transfer. See your modem manual for more information on timed-break recall (! dial modifier).

3. Choose **Dial**.

The Organizer displays the Dialing dialog box.

4. Choose the appropriate option.

- If the call is answered, choose **Answered**. To log this call, see [Using the Phone Log](#).
- If the call is not answered, choose **Not answered**.
- If the call is busy, choose **Busy**.
- If the call isn't completed and you want to redial, choose **Retry**.

The result you choose is recorded in the phone log.

### To track calls

To keep a log of incoming or outgoing calls:

1. Make a phone call and choose **Answer** when it connects or, if you receive an incoming call, click the Phone icon in the Toolbox and choose **Incoming**.

The Organizer displays the Call Log dialog box. The call duration appears in the lower left corner of the box.

2. Type any notes as the call progresses.


These notes will be saved as part of your phone log.

**Tip** You also need to type the name of the person you talked to, as this is not saved automatically in the phone log.

3. When the call is completed, choose **Hang up**.

### To dial frequently used numbers

You can keep a list of numbers that you dial frequently on hand for quick reference.

1. Click the Phone icon  in the Toolbox.  
The Organizer displays the Dial dialog box.
2. To add a name to the **Quick dial** list, choose **New**, type a name and number, and choose OK.
3. To call someone, select a name from the **Quick dial** list and choose **Dial**.
4. To change or delete a name or phone number, highlight the name you want to edit, choose **Edit**, then make your changes and choose OK, or choose **Delete** to remove the name from the list.

**Note** You can also quickly dial numbers from the Dial dialog box by clicking the numbers on the numeric keypad.

### To change the modem settings

If you're having problems making connections, you might need to change the modem settings.

1. Choose Options/Auto Dialer.  
The Organizer displays the Auto Dialer Options dialog box.
2. Change any of the settings to be compatible with your modem.

For more information, see your modem documentation.

#### **Port**

Selects the communications port to which the modem is attached.

#### **Baud**

Selects the speed of the modem.

#### **Dial Prefix/Suffix**

Specifies the command string for both before (Prefix) and after (Suffix) you dial.

#### **Hangup Prefix/Suffix**

Specifies the command string for both before (Prefix) and after (Suffix) you hang up.

#### **Dial type**

Selects whether your modem line is tone- or pulse-compatible. (Most telephones use tone dialing.)

#### **Access code**

Specifies the command string placed before all phone numbers to access a particular exchange or phone-company system. This code is placed after any prefix specified in the Dial dialog box (such as 9 for external calls) and before the phone number.


#### **Don't dial**

Specifies the characters to omit when dialing. Use this option to strip the area code from the beginning of a phone number. The prefix and access codes will still be dialed before the phone number. For example, you might need to remove an area code or an international dialing code if you are on a business trip and dialing from another city or country.

3. Choose OK.

### **To troubleshoot modem operation**

The Organizer ships with the most common modem settings. However, different modems may require different settings for proper operation. If you have difficulty making phone calls, try the following tips.

- If the modem doesn't dial, choose Tools/Phone Call and deselect "Use prefix" in the Dial dialog box.
- If the modem won't hang up when the call is finished, choose Options/Auto Dialer and change the **Dial Suffix** setting to the appropriate command, such as AT or two spaces, for your modem. See your modem documentation for the specific command.
- Make sure the COM port settings are correct in the Windows Control panel. To check this, click  in the upper left corner of the screen to display the Control Menu. Choose Run, select **Control Panel**, then OK. Select **Ports** and make sure the settings are correct for the appropriate COM port.
- Choose Tools/Auto Dialer and make sure all the settings are correct for your modem. See your modem documentation for the appropriate information.
- Choose Options/Phone Call and make sure all the settings are correct for your modem. See your modem documentation for the appropriate information.

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## Using the Phone Log

You can use the phone log to keep track of your calls. The phone log displays a list of all calls made on a particular date and their results, as well as any notes you made during that call. The phone log also helps manage the task of redialing unanswered calls.

1. Choose Tools/Phone Log .

The Organizer displays the Phone Log dialog box.

2. Select the calls you want to view.

### **Calls made on**

Specifies the date of the calls you want to view. You can either type the date or choose one from the pop-up calendar.

### **All Calls**

Lists all calls in the phone log.

### **Unanswered**

Lists all calls you made that weren't answered.

3. Select the call you want to view.
4. Review or edit the notes taken during the call in the **Notes** box.
  - To save any changes, choose **Update** or select another call.
  - To delete the selected call from the phone log, choose **Remove**.
5. Choose **Close** when you finish with the phone log.



## Using Information in the Notepad

You can use the Notepad section to keep notes, lists, reminders, memos, or anything you would usually write on a piece of paper. You can type as much text as you like and scroll up and down the text if it is longer than the page.

You can also display diagrams, organizational charts, maps, or logos on Notepad pages. Or you can bring in financial information, such as sales charts, using DDE links.

As you add pages in the Notepad, the Organizer automatically builds a table of contents that can be arranged into chapters. It's also easy to customize your notebook by adding new Notepad sections for different purposes.

The sample file ALMANAC.ORG in the \ORGANIZE\SAMPLE directory demonstrates how you can create a Notepad section with various types of information.

### Using the Notepad section, you can:

- [Add different types of Notepad pages](#)
- [Edit Notepad page options](#)
- [Copy or move Notepad pages](#)
- [Display a table of contents for a Notepad section](#)
- [Work with picture pages in the Notepad](#)
- [Bring text or graphics into the Notepad using the Clipboard or DDE links, or bring ASCII text into a Notepad section](#)
- [Copy information from the Notepad to other Windows applications](#)

**Note** You can use the Organizer's [cross-referencing links](#) to link information within the same section or across sections in an Organizer file. You can also use the cross-referencing links to access files and start applications.

## Adding a Notepad Page

### In the Notepad, you can:

- Add new pages
- Type text directly on a Notepad page
- Delete a Notepad page
- Move the pages within the Notepad

You can have as many pages in your Notepad section as you like.

### To add a Notepad page

1. Click the Notepad section tab.
2. Click anywhere on the Contents page.  
The Organizer displays the Notepad Page Insert dialog box.
3. Type a title for the page.  
This title also appears in the Notepad's table of contents.
4. Select the **Type** of information the Notepad page will contain.

#### **Blank**

Specifies a plain page with no information. For example, you might want to insert a blank page at the end of a chapter so the next chapter starts on the right side of the notebook.

#### **Text**

Specifies a page on which to type text or bring in text from any ASCII file.

#### **Metafile**

Specifies a page for a Windows metafile® (.WMF), such as a picture created by Freelance® for Windows, SmartPics(TM), or 1-2-3®. Most Windows drawing packages can output metafiles. For information, see [Working with Picture Pages](#).

#### **Bitmap**

Specifies a page for a bitmap (.BMP) file such as a picture created by Windows Paintbrush®.

#### **Links**

Specifies a page to list Organizer [links](#).

5. Select where the Notepad page information comes **From**.

#### **Organizer**

Specifies that you will type directly on the page or that you'll paste text on the page.

#### **File**

Specifies that the information is from another file. Every time you turn to this page, the Organizer automatically checks this source file. If the file has changed, the new version is displayed on the Notepad page. For information, see [Bringing in Information from Other Applications](#).

#### **Clipboard**

Specifies that the information is pasted from the Clipboard. This option is displayed only if there is information on the Clipboard of the correct type. For information, see [Bringing in Information from Other Applications](#).

#### **DDE**

Specifies that the information pasted from the Clipboard will be updated as soon as the data changes in the source application. Every time you turn to this page, the Organizer automatically checks the source file. If the information changes in the source application, the new version is displayed on the Notepad page. For information, see

## Bringing in Information from Other Applications.

### **Keep copy**

Makes a copy of the information that comes from a File or DDE source in your Organizer file. If you select "Keep copy," the page displays faster because the information is in the Organizer file. If the information changes, the Organizer asks you if you want to update the Notepad page with the new version.

**Note** A page created with a **Source** of "Clipboard" has "Keep copy" set by default.

6. Specify the **Source** of the information by entering the path and filename of the file you want to bring into the Notepad. You must specify a source if you are bringing information in from a file or DDE link.

**Note** Choose **Browse** to easily find the directory and file you want. If you are creating a DDE link, choose **Browse** and select from the available DDE servers. To view all file types in the Browse for Text dialog box, type \*.\* and choose OK. Then choose a file from the list.

7. Select the appropriate **Page attributes**.

### **Chapter**

Divides your Notepad pages into chapters and groups together related information. The table of contents displays a chapter number before the page title.

### **Foldable**

Creates a wide page for displaying more information. When you turn the page, the Organizer automatically folds the page. For information, see [Working with Picture Pages](#).

### **Confidential**

Limits access only to users with the file's private password. For information, see [Using Passwords](#).

### **Fit to page**

Resizes the information to fit on the page. For information, see [Working with Picture Pages](#).


### **Align**

Changes the position of the text or pictures that you're inserting in the Notepad page. The new alignment is displayed when you click the title to save the page.


8. Specify the number of pages you wish to insert. If you specify more than one page, only the first page has a title.
9. Choose OK.

## **Other ways to insert a Notepad page**

You can use any of the following methods to insert a page:

- Press INS in the Notepad section.
- Click  in the Toolbox.
- Choose Tools/Insert Page.

## **To type text directly on a Notepad page**

1. Click  in the Toolbox to create a new page.
2. Type a title and select "Text" for **Type**.
3. Choose OK.

**Note** If necessary, turn to the page by clicking its entry in the table of contents.

4. Click the page, below the title.


The Organizer displays a text editing area.


5. Type the text.
6. To save the text, click the page title, press F2, or turn the page.

**Note** To edit the text page, turn to the page and click it below the title.

### To delete a Notepad page


If you want to delete a page from your Notepad:

- From the table of contents or the page itself, drag and drop the page into the Trash .
- To delete two consecutive pages, hold down SHIFT as you drag and drop the pages in the Trash.

**Note** Once you delete a page, you can retrieve it by choosing Edit/Undo  before you delete something else. You cannot undo a deletion of two pages.

### To move pages in the Notepad

You can easily insert a page in a particular place in the Notepad when you create a new page, or copy or move pages. You can also rearrange the pages in your Notepad section.

- If you drag and drop the page on a blank part of the table of contents (that is, in the margins or after the last entry), the page is placed at the end of the Notepad section.
- If you drop the page over an existing entry in the table of contents, the page is inserted before the entry and all subsequent pages are moved after the new page.
- While the pages are open, you can drag and drop a page to the left or right of the binder rings. The page will be inserted before the page you dropped it on, and all other pages are moved after the new page.
- If you click  in the Toolbox, the Notepad Page Insert dialog box appears. The page you create is placed in the Notepad at the currently open page on the right side. If you're in the table of contents when you create a new page, the page is placed at the end of the section.

**Note** When you insert a page, you can specify whether to insert a single page or a number of pages. This is useful if you want to create many pages of the same type with page attributes.

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## Editing the Notepad Page Options

You can change the description of a Notepad page at any time. This allows you to add or change the title for a page or to edit the page attributes as necessary. If the page does not have a title, click the middle of the top line of the page where a title would be.

1. Click the title of a Notepad page.

The Organizer displays the Notepad Page Edit dialog box.

2. Change any of the information in the Notepad Page Edit dialog box, if needed. For more information, see [Adding a Notepad Page](#).

**Caution** If you change the **Type** or **Source** of information, you will lose the information previously on the page.

3. Choose OK.



The page is redisplayed according to your changes.

## Copying and Moving a Notepad Page

You can copy or move a Notepad page to another part of the Notepad section or to another Notepad section. You can also copy or move selected text on a page using the Edit/Copy or Edit/Cut and Edit/Paste commands.


### To copy a Notepad page

To copy a Notepad page within or across Notepad section(s):

1. Drag a page onto  in the Toolbox.
2. Drag and drop  on your Notepad where you want to insert the page. You can drop the page on the table of contents or place it directly on the open notebook. For information, see [Adding a Notepad Page](#).


### To move a page within the Notepad section

To move a page within or across the Notepad section(s):

1. Click  in the Toolbox.
2. Click the page to be moved.  
A bar displays below the magnet.
3. Turn to where you wish to insert the page and click to drop the page.

**Note** You can drop the page on the table of contents or place it directly on the open notebook. For information, see [Adding a Notepad Page](#).

The page is inserted, and the page numbers are updated to reflect the move.

4. When you're finished moving pages, click  in the Toolbox to deselect



**Tip** To copy the page, hold down CTRL as you drop the page.

## Modifying the Table of Contents

The Organizer automatically provides you with a table of contents for your Notepad section, which you can customize to fit your needs.

1. Choose Options/Notepad.

The Organizer displays the Notepad Options dialog box.

2. Select the option you want, then choose OK.

### **Show contents**

Displays a table of contents.

### **Short contents**

Displays only chapter titles in the table of contents.

**Tip** To group related information, divide your Notepad pages into chapters. To create a chapter page, specify "Chapter" for a page attribute when you create or edit a page. The table of contents displays a chapter number before the title.

## Working with Picture Pages

You might want to use picture pages to build a graphical reference for diagrams, to display charts, or to show logos.

### With Notepad picture pages you can:

- Display pictures using two formats for graphical data: bitmap or metafile
- Make a picture fill the entire page
- Keep a copy of the picture in the Organizer file
- Use folding pages to display larger pictures
- Adjust the position of a picture on the page

### To display a bitmap or metafile picture

1. Create or edit a Notepad page.
2. Select "Bitmap" or "Metafile" for **Type**.
3. Select "File" for **From**.

**Note** If the picture is on the Clipboard, select "Clipboard" for **From**.

4. Specify a path and filename for **Source** or choose **Browse** and specify a bitmap (.BMP) file or metafile (.WMF).

**Tip** To display a sample picture, you can specify SAMPLE.BMP or LAYOUT.WMF from the \ORGANIZE\SAMPLE directory.

5. Choose OK twice.

The Organizer displays the picture on the page.

### To make a picture fill a page

Sometimes you may wish either to stretch a picture to fill a whole page or to shrink it so it all appears on a page.

1. Click the title of a page containing a picture.

The Organizer displays the Notepad Page Edit dialog box.

2. Select "Fit to page" and choose OK.

The picture is stretched to fill the entire page.

**Note** To retain a picture's original proportions when it fills the whole page, select "Keep aspect ratio" in the Notepad Page Edit dialog box.

### To keep a copy of a picture

You can store a copy of a picture within your Organizer file:

1. Click the title of a page containing a picture.

The Organizer displays the Notepad Page Edit dialog box.

2. Select "Keep copy" and choose OK.

**Note** If you don't select "Keep copy" and the information in the source file changes, the Organizer asks you if you want to update the copy.

### To use folding pages to display larger pictures

You can unfold your Notepad page if you want to display larger pictures:


1. Click the title of a page containing a picture.

The Organizer displays the Notepad Page Edit dialog box.



2. Select "Foldable" and choose OK.

The picture displays on the page and appears at the upper right corner of the page.

Click  to unfold a page, and click

 to fold it back. If you turn the page, the Organizer automatically folds the page for you.

### **To position pictures on a page**

You may want to position a picture differently on the page.

1. Click on the title of a page containing a picture.

The Organizer displays the Notepad Page Edit dialog box.

2. Choose **Align**.

The Organizer displays the Alignment Options dialog box.

3. Select the appropriate alignments.
4. Choose OK twice.

## Bringing in Information from Other Applications

You can bring information into the Notepad in several ways:

- **Using the Clipboard:** Select text or graphics in the source application and copy it to the Windows Clipboard. Then paste the information into the Organizer from the Clipboard.
- **Using a File:** When you create a Notepad page, specify a file that contains ASCII text.
- **Using DDE links:** Select the text or graphics in the source application and copy it to the Clipboard. Then paste the information into the Organizer using a DDE link. If the text or graphics in the source application changes, it also changes in the Notepad.

**Note** To use DDE links with the Organizer, the source application must support DDE. For this information, see your application documentation.

### To bring in information using the Clipboard

You can copy text or other information to the Organizer from other Windows applications. For example, you might want to include a spreadsheet graph on a Notepad page or import information from your word processing program.

1. In another Windows application, select and copy to the Clipboard the information you want.
2. Start the Organizer and click the Notepad section tab.
3. Create a Notepad page.

The Organizer displays the Notepad Page Insert dialog box.

4. Select the **Type** of information you are bringing in.

For example, to bring in a 1-2-3 graph or Freelance graphic, select "Metafile" for **Type**.

5. Select "Clipboard" for **From**.

**Note** The "Clipboard" option is only available when the information on the Clipboard is in the correct format. If you don't see "Clipboard" listed as an option, try changing the Notepad page **Type**.

**Tip** You can run the Windows Clipboard program and choose Display to see the available formats. "Picture" is the same as "Metafile."

6. Choose OK.

The Organizer displays the page with the Clipboard information on it.

**Note** You can paste information onto a page at any time. Click the page to display the text-editing area. Then choose Edit/Paste. If Paste is grayed out, and the Clipboard contains information in the correct format, try changing the page **Type**.

### To bring in ASCII text from another file

You can bring ASCII text into the Notepad section. You may find this method useful if your source application doesn't support DDE. For example, you can use this procedure to display text files from 1-2-3 for DOS.

1. Save the file or export it in ASCII format.

For example, you can save an Ami Pro® document in ASCII format.

2. Create or edit a Notepad page.
3. Select "Text" for **Type** and "File" for **From**.
4. Choose "Keep copy" if you want to make a copy of the information from the source file in your Organizer file.

**Note** If you select "Keep copy," the page is displayed faster because the information is

in the Organizer file. If the information changes, the Organizer asks you if you want to update the Notepad page with the new version.

5. For **Source**, specify the name of the ASCII file, or choose **Browse** and select the ASCII file from the directory.
6. Choose OK.

The file is displayed on the page, ready to be read or edited.

7. If you edit the text, click the title to save the text.

The Organizer asks you to confirm your action.

**Caution** When you save the edits to the file, the DOS file is overwritten.

8. Choose **Yes**.

### To bring in information using DDE links

You can use Dynamic Data Exchange (DDE) to exchange information between the Organizer and other Windows applications. The Organizer can receive DDE information, but cannot send DDE information. That is, the Organizer can be a client but not a server.

When you use DDE, you're using the Clipboard to establish links to other Windows applications. DDE pages can redisplay the information as it changes in the source application. For example, you could have a DDE page showing the latest sales figures in a 1-2-3 graph.

**Note** You can save text changes that you make on the Notepad page to the source application. For more information, see [Using Dynamic Data Exchange \(DDE\) Links and Using DDE Links to Bring Information into the Organizer](#).

1. Select the text or graphics you want in the source application and choose Edit/Copy to copy it to the Clipboard.

**Tip** Make sure the source file has been saved.

2. Create or edit a Notepad page.
3. Select the **Type** of information the page will contain.
  - Choose "Text" if you've only copied text to the Clipboard.
  - Choose "Metafile" to see both text and graphics that can be scaled.
  - Choose "Bitmap" for the fastest display of fixed-size graphics.
4. For **From**, select "DDE."

**Note** You can choose **Browse** and select the DDE server required.


5. Choose OK.
6. Click the page you want to edit.


The text-editing area appears.
7. Choose Edit/Paste DDE Link.

**Note** If the text or graphics in the source application changes, it also changes in the Notepad. If you change information in the Organizer, you are prompted whether to send changes to the source application as well.

## Copying Information to Other Applications

You can use the Clipboard to copy information from Notepad pages to other Windows applications.

1. Turn to a Notepad text page.
2. Click on the page to display the text editing area.
3. Select the text to be copied.
4. Choose Edit/Copy .

**Note** To copy a page, you can also drag and drop the page to the  in the Toolbox.

5. Open the other application and select Edit/Paste to paste the Organizer information from the Clipboard.

## To Position Pictures on a Page

You may want to position a picture differently on the page.

1. Click the title of a page containing a picture.

The Organizer displays the Notepad Page Edit dialog box.

2. Choose **Align**.

The Organizer displays the Alignment Options dialog box.

3. Select the appropriate alignments.

**Note** If you are working with text pages, you cannot alter the vertical alignment.

4. Choose OK twice.

## Tracking Events in the Yearly Planner

The Planner chart looks just like a wall chart where you mark events, tasks, or milestones with color blocks or strips.

The Planner helps you schedule and prepare for important events that happen later in the current year or in years ahead. It's especially useful if you need to designate blocks of time for a particular activity such as a vacation, an off-site meeting, or a conference.

You can also specify that your events show in the Calendar, so you can see your upcoming commitments in the context of your daily work.

### Using the Planner section, you can:

- [Record and edit events, projects, or milestones](#)
- [Show or book Planner events in your Calendar](#)
- [Show Calendar appointments in your Planner](#)
- [Customize your Planner](#)

### To unfold the Planner page

1. Click the Planner section tab.

The Planner chart is folded, so you need to unfold it before you can use it.

2. Click  near the upper right corner of the page.

The page unfolds to display the current year.

The Planner looks like a wall chart.

- The months of the year are on the left, the days of the week are across the top, and the years are on the right side. If you want to look at the Planner schedule for a different year, click that year.
- As you move the pointer around the Planner, the date you are over is displayed at the top of the page.
- The first day of each month is marked with red (or black on monochrome system) and with the number 1 in the upper left corner.
- At the bottom of the page, the Planner provides a color key (patterns on a monochrome system) that you can place on the chart to mark activities that span at least an entire morning or afternoon. You can customize the key descriptions to suit your needs.

**Note** To fold a Planner page, click  near the upper right corner of the page.

**Note** To see how key blocks will print on a black and white printer, choose Options/Preferences and then choose "Monochrome." The key blocks change from color to hatch patterns.

## Entering a Planner Event

The Planner shows a yearly view of events.

### Using the Planner you can:

- Enter events that continue all day for one or more days
- Change the description of a Planner event
- Delete all or part of an event

### To enter a Planner event

1. Click a color block for the type of event you want to record and release the mouse button.

The pointer changes to a block in that color or pattern.

2. Move the color block over the first day of the event.

As you move, the date you are over is displayed at the top of the page.

3. Click and drag the block to the last day of the event.

Drag straight across to mark only AM or PM blocks, or drag across and down to mark whole days.

**Note** To mark a whole day, start in the AM block.


4. Release the mouse button.

The Planner displays the color or pattern for the particular event in the appropriate time slots.

**Note** If you position the pointer over a color block in the legend at the bottom of the screen, the Organizer displays the number of days committed to that activity for the current year at the top of the Planner chart.

### Other ways to enter Planner events

You can use any of the following methods to enter a Planner event:

- Press INS.
- Click the first day of the event.
- Click  in the Toolbox.
- Choose Tools/Insert Event.

In each case, select the type of event, the start and end dates, and AM or PM in the New Event dialog box.

### To change the description of a Planner event

You can change the description of a Planner event without changing the dates or times of the event.

1. Click the name for a color block at the bottom of the page (for example, "Project 1").
2. Select the text and type the new description.

### To delete all or part of a Planner event

You can easily delete all or part of the time allotted to an event.

1. Drag and drop a color block from the event you want to delete into the Trash .

The Delete Repeating Event dialog box appears.

2. Select the appropriate option and choose OK.

**Just this one**

Deletes the selected date, both AM and PM.

**All**

Deletes the whole event block that was entered at one time.

**All previous**

Deletes all dates before and including the date you selected.

**All future**

Deletes all future dates in this event block, including the date you selected.

**Note** To change all the dates for a Planner event, delete the whole event and enter a new one.



## Using Your Planner and Calendar Together

Your Planner and Calendar can work together to help you manage your time. You can:

- View Planner events when looking at your Calendar
- Book Planner events in your Calendar
- Show Calendar appointments in your Planner

### To show Planner events in your Calendar

1. Choose Options/Calendar and choose **Show**.

The Calendar Options (Show) dialog box is displayed.

2. Select the Planner section from the **Show entries from** list.

**Note** To deselect a section from the list, click it again.

3. Choose OK twice.

All Planner events now appear in your Calendar, above any appointments.

**Note** If you show Planner events in your Calendar, you can turn from Planner events directly to the Calendar. Hold down SHIFT and click the event.

### To book Planner events in your Calendar

Events in your Planner aren't usually booked in your Calendar section. However, you might want to block off time in your Calendar for events in your Planner, such as vacation time. That way, you won't double-book your time while using your Calendar.

**Caution** When you change your Planner to book time in the Calendar, any existing Planner events will disappear.

**Tip** You may wish to add a separate Planner section to book time in the Calendar. For information, see [Changing a Section](#).

1. Choose Options/Planner.

The Organizer displays the Planner Options dialog box.

2. Choose **Book time in** and select the Calendar section.
3. Choose OK.

All Planner events now book time in your Calendar just as if you created them from the Calendar section.

**Note** To remove this option, select Planner for **Book time in**.

### To show Calendar appointments in your Planner

You can avoid scheduling conflicting events by showing Calendar appointments in your Planner.

1. Choose Options/Planner.

The Organizer displays the Planner Options dialog box.

2. Choose **Book time in** and select the Calendar section.
3. Select "View Calendar appointments."
4. To select a color for viewed appointments, click the arrow to the right and select the color you want.
5. Choose OK.

Planner displays each Calendar appointment with a color bar. The bar's position and size represent its approximate time and duration.

**Note** To remove this option, deselect "View Calendar appointments" and choose OK.

### **To resolve conflicting events and appointments**

If you set the Organizer to book Planner events in your Calendar and create a Planner event that conflicts with an existing appointment, the Organizer displays the Conflicting Event dialog box.

To resolve the conflict, do one of the following:

- Change the event's time using the TimeTracker.
- Change the date.
- Choose **Find time** to automatically go to the next free time slot. Select "Include weekends" to find free time on Saturday and Sunday.
- Choose **Skip** to ignore the conflict.

## Customizing Your Planner

You can customize your Planner to specify how it works with your Calendar. You can choose to include weekends, and/or your morning and afternoon time slots.

1. Choose Options/Planner.

The Organizer displays the Planner Options dialog box.

2. Select the option you want.

### **Book time in**

Selects a Calendar section in which to automatically book Planner events.

### **View Calendar appointments**

Displays all the appointments from the Calendar section that you have already booked. They appear as color bars in your Planner.

### **Include weekends**

Allows you to book time during a weekend.

### **AM/PM TimeTrackers**

Sets the start and end times for your AM and PM blocks.

See also:

[Using Your Planner and Calendar Together](#)

[Setting Duration Using the TimeTracker](#)



## **Keeping Track of Anniversaries**

You can use the Anniversary section to keep a list of all the important dates that you need to remember every year, such as birthdays and wedding anniversaries. You can enter as many anniversaries as you like. After you've entered a date in the Anniversary section, that date will automatically carry forward into future years.

### **Using the Anniversary section, you can:**

- Enter anniversaries
- Edit the text of an anniversary or change its date

## Entering an Anniversary

You can easily enter or delete anniversaries.

### To enter an anniversary

1. Click the Anniversary section tab.

The Organizer displays the first page of the Anniversary section.

2. Click  in the Toolbox.

The Organizer displays the Anniversary dialog box.

3. Specify the date for the anniversary.

You can type the date, or use the down arrow next to the date and select a date from the pop-up calendar.

4. Type the description for the anniversary.

5. Choose OK.


Your anniversaries automatically appear in your Calendar section, above the appointments for each day. If you don't want your anniversaries to appear, choose Options/Calendar and then choose **Show**. Deselect "Anniversary" and choose OK twice.

**Note** You can turn directly to the day in the Calendar where the anniversary appears. Hold down SHIFT and click the anniversary text.


**Note** To make an anniversary confidential, select "Confidential" in the Anniversary dialog box. You must open the file with a private password to see the anniversary. For information, see [Using Passwords](#).

### Other ways to enter an anniversary

You can use any of the following methods to enter an anniversary:

- Press INS.
- Click the month for the anniversary.
- Choose Tools/Insert Anniversary.
- Click  in the Toolbox.

### To delete an anniversary

- Drag and drop the anniversary into the Trash .

## **Editing an Anniversary**

### **To edit the text of an anniversary or change its date**

1. In the Anniversary section, click the anniversary text.  
The Organizer displays the Anniversary dialog box.
2. Change the date or the description of the anniversary.
3. Choose OK.

**Note** You can change the color of your anniversaries by choosing Options/Anniversary.

## Working with Multiple Sections

The Organizer comes with six standard sections to help you manage your work:

- [Calendar](#)
- [To Do](#)
- [Address](#)
- [Notepad](#)
- [Planner](#)
- [Anniversary](#)

You can add more sections to make it even easier to quickly access the information you need. For example, you might want to keep one Address section for your business contacts, while maintaining a separate Address section for the names of friends and family. Or you could have several different Planners to keep track of deadlines for different projects.

You can also use the sections to build complete books of information that are specific to your work. For example, you could create a corporate manual called Policy that's accessible to all employees, or a notebook that contains your business goals and strategies.

After you set up your sections, you can reorganize them to adapt to your changing needs. You can add, remove, or rename sections, or you can change the order in which they appear in the Organizer. You can also change the colors of your section tabs so you can more quickly find your information.

### **To customize sections, you can:**

- [Add and delete sections](#)
- [Customize section tabs by changing their names, colors, and sizes](#)
- [Include sections from other Organizer files](#)


## Changing a Section

You can change sections by:

- Adding a section
- Deleting a section

### To add a section

You can add as many new sections as you want. Tabs for the other sections in the Organizer will automatically make room for any sections you add.

1. Choose Options/Customize .

The Organizer displays the Customize Organizer dialog box.

2. Choose **Add**.

The Add New Section dialog box displays.

3. Select the type of section you want from the **Based on** list.

For example, you might want to add another Notepad section.

4. Type a name for the section.

For example, you might call your new section Conference because you want to collect all the information about a conference you're planning.

5. Choose OK.

Your new section now appears in the list of sections in the Customize Organizer dialog box.

**Note** You can identify the type of section by looking at the icon before the section name.


6. Choose OK.

The Organizer adds the new section at the back of the notebook.

**Tip** If you don't easily see the section tab you want, you can use the Section menu to turn directly to that section.

### To delete a section

1. Make sure you are not in the section you want to delete.

2. Choose Options/Customize .

3. Select the section you want to delete.

**Caution** Make sure you are deleting the correct section. When you remove a section, all the information within it is lost and cannot be recovered.

4. Choose **Remove**.

5. Choose **Yes** to confirm your action.

6. Choose OK.

**Note** If you delete an included section, you do not delete the information that is in the included section. For information, see [Including Sections from Other Organizer Files](#).

**Note** You cannot remove a section if the file is protected by a private password. For information, see [Using Passwords](#).




## Customizing Section Tabs

You can customize your section tabs by changing:

- Section names
- Color and position of section tabs
- Size and width of section tabs


### To change a section name

1. Choose Options/Customize .
2. Select the section name you want to change.
3. Choose **Rename**.
4. Type the new name for the section.
5. Choose OK twice.

### To change color and position

You can select different colors for your section tabs, and you can rearrange the order of the sections. For example, you might want to group together by color all of your sections that are related to one project.

To change the color and position of a section tab:

1. Choose Options/Customize .
2. Select a section.
3. Select the color you want.
4. Choose **Up** or **Down** to move the section's position.
5. Choose OK.

### To change size and width

1. Choose Options/Display.
2. For **Overlap by**, type the amount you want the tabs to overlap.
3. To change the width of the section tab, select "Narrow," "Medium," or "Wide" for **Width**.
4. To make the section tab only as large as the section name, select "Size to name."
5. Choose OK.



**Tip** You can also change the color of your Organizer binder. Choose Options/Display and use the down arrow to the right of **Book cover color** to select the color you want.

## Including Sections from Other Organizer Files

You can include sections from other Organizer files in your Organizer. Included sections are useful for sharing information, such as a company phone book, among many users, or for quickly referring to some information without closing your Organizer file.

**Note** You can't make changes to the included section. If the information in an included section changes, you will see the change the next time you turn to that page.

### To include a section from another Organizer file

1. Choose Options/Customize .
2. Choose **Include** .  
The Organizer displays the Include From dialog box.
3. Specify the Organizer file that contains the section you want to include and choose OK.  
The Organizer displays the Include Section dialog box.
4. Select the section to include and choose OK.

**Note** You can save your Organizer file with an included section. The next time you open the file, the included section is displayed automatically. If the file that contains the section is protected by a password, you are prompted to type the password. For information, see [Using Passwords](#).



## Cross-referencing Information in the Organizer

The Organizer lets you cross-reference or link discrete pieces of information to help you visualize a network of associated material.

You can set up links between the information within your Organizer files and quickly turn to the information you've cross-referenced. You can create links between pieces of information in different sections in the Organizer or between entries in the same section. You can also easily establish links to other files or applications and use the links to access the file or run the application. Link menus and Notepad Links pages display the links associated with a specific entry.

For example, you might link an appointment in your Calendar to a person in your Address section so you have quick access to that person's phone number. You might link the same appointment to some business information in your Notepad, such as the agenda for a meeting.

**Note** You cannot link to information in the Planner or the Anniversary sections.

**Note** Cross-referencing information in your Organizer files to other applications is not the same as creating DDE links with other applications. For more information, see [Bringing in Information from Other Applications](#) and [Using Dynamic Data Exchange \(DDE\) Links](#).

### By cross-referencing information, you can:


- [Create and navigate links between information in your Organizer](#)
- [Use links to access files and run applications](#)
- [Use Notepad Links pages to easily refer to linked information](#)


## Linking Information in the Organizer

Linking information in the Organizer is easy. When you link you can:


- Link information within or between sections
- Create multiple links to one entry
- Navigate linked information
- Delete links

### To link information within a section or between sections

1. Click  in the Toolbox.
2. Move the mouse pointer to the information you want to link.  
For example, you might want to link a Calendar appointment to an Address record.

When you move the pointer over the appointment, it changes to .

3. Click the information you want to link.


The pointer changes to .


**Note** You can cancel the linking process by pressing ESC.


4. Turn to the next piece of information you want to link to, such as an Address record.

You can turn pages or click a section tab to move through the Organizer sections.

5. Click the information to which you want to link.

 appears next to any linked information.

6. When you finish creating links, deselect the Anchor tool by clicking  in the Toolbox.

**Note** To see the links you've created, point to  and hold down the mouse button.

### To create multiple links to one entry

You can create links to more than one piece of information. For example, you can create multiple links from a meeting scheduled on your Calendar to the Address records of the people attending the meeting.

1. Follow steps 1-5 above to create a link.

For example, you can link a meeting with one Address record.

2. Repeat steps 2-5 above to create more links to the same piece of information.

For example, you can link the same meeting with several more Address records or with a Notepad page that lists the meeting's agenda.

**Tip** To quickly link one entry to multiple entries, hold down CTRL when you click the entries to which you want to link.

### To navigate linked information

The connections for a link are displayed in a Link menu. You use Link menus to navigate linked information.

1. Move the mouse pointer to  and hold down the mouse button.

The Organizer displays the Link menu, which lists all information that's linked to the entry.

The link's description is preceded by a symbol that indicates the type of section it's in. The arrow at the end of a link description indicates that this linked entry contains

additional links.

**Note** To leave the Link menu displayed on the screen, release the mouse button while the pointer is on the blank square or arrow at the end of a menu item. To remove the display of additional links, click the arrow. To remove the whole Link menu, click anywhere on the page.

2. Select the link you require.

- Move the pointer to the item you want on the menu and release the mouse button.


**or**

- Move the pointer to the arrow at the end of an item to display additional links. Then, move the pointer to the item you want and release the mouse button.

### To delete a link


1. Click  in the Toolbox.


2. Turn to the information you want to unlink.

3. Click  and hold down the mouse button.

4. Select the link you want to delete from the Link menu and release the mouse button.



**Note** The Organizer deletes only the link, not the information.

5. To deselect the Axe tool, click  in the Toolbox.

**Note** When the last link to an entry is deleted,  is no longer displayed.

## Linking to a File or Application

You can link information in the Organizer to other files or applications. For example, you might want to link a budget meeting to a spreadsheet that contains budget forecasts. Or you might want to launch an application while you're using the Organizer, such as 1-2-3 for Windows or Windows Paintbrush.

1. Click  in the Toolbox.
2. Click the information you want to link.
3. Choose File/Reference .  
The Organizer displays the Reference dialog box.
4. Type a description for the link.
5. Type the full path and filename or choose **Browse**. Select the external file or application you want to link and choose OK.


**Note** If you're unable to select an external reference to a data file, the file's extension may not be associated with an application program. Use the File/Associate command in the Windows File Manager to define the correct associations. For information, see the *Microsoft Windows User's Guide*.

**Note** To link to an external file with a nonstandard extension, enter the full path to the application that runs the file, a space, and then the full path to the external file with a nonstandard name. For example: c:\wpwin\wpwin.exe d:\organize\sample\mailmrg.prm

6. Choose OK.  
The Organizer displays a link to the file or application you selected.

### To access a linked application

You can access an external file or run an application using a link you've established.

1. Click  for the entry that's linked to the file or application you want and hold down the mouse button.  
An ellipsis (...) is displayed after the description of a link to an external application.
2. Select the link to the external file or application, and release the mouse button.  
The file or application you selected is displayed.  
**Note** Some applications do not allow more than one copy of the application to run at a time. If you select a link and nothing happens, the application may already be running.
3. When you've finished with the external file or application, choose File/Exit or switch back to the Organizer window.

### To change a link to an external file or application

1. Display the Link menu containing the external link.
2. Select the ellipsis (...) at the end of the link item.  
The Organizer displays the Reference dialog box.
3. Edit the link description and filename, and choose OK.

## Displaying a List of Links

In addition to Link menus, you can use a Notepad Links page to display a list of links. For example, you can create a page with links to all the information on one project or to your most commonly used applications.

### To display a list of links


1. Go to the Notepad section and insert a new page.  
The Organizer displays the Notepad Page Insert dialog box.
2. Type a page title, such as "Sales Project."
3. Select "Links" for **Type**.
4. Choose OK.
5. Create links between this page and related Organizer information or other applications. For example, you might link project meetings to this page, as well as the names of other people working on the project.
6. To turn to one of the linked entries, access a file, or launch an application, click on the appropriate item on the Notepad Links page.

**Tip** To quickly link one entry to multiple entries, hold down CTRL when you click other entries to which you want to link.

## Integrating the Organizer with Other Applications

You can use the Organizer to make the most of other Windows applications, such as 1-2-3 or your word processor.

### To work more efficiently using other applications, you can:

- Use the Windows Clipboard to copy information from one Windows application to another
- Send and receive mail
- Use DDE links to bring information from other Windows applications to the Organizer
- Import names and addresses from another application
- Export names and addresses to use mail merge with other word processing programs, such as Ami Pro, Microsoft Word for Windows, or WordPerfect for Windows
- Schedule an appointment that automatically runs an application at a preset time
- Create a link (not a DDE link) using  to access files or run applications
- Click the Control-menu box in the upper left corner of your screen and choose Run. You can select or specify an application to run.





## Using the Windows Clipboard

You can use the Windows Clipboard to transfer information between the Organizer and other Windows applications. The Clipboard can also be used to transfer information within the Organizer.

All Windows applications have an Edit menu.

- To copy information, select it and then choose Edit/Copy.
- To paste information, position the insertion point and choose Edit/Paste.


In the Organizer, you can access the Clipboard using the Edit menu or from  in the Toolbox.

This icon changes to  when you copy information to it. Each time you copy information, it replaces the current contents of the Clipboard.

**Note** You cannot copy Planner events or anniversaries to the Clipboard.

### To copy an Organizer entry to the Clipboard

You can use the Clipboard tool to quickly copy an entire entry in the Organizer, such as a Calendar appointment, a To Do task, an Address record, or a Notepad page.

- Drag and drop the entry on .


**Note** With Notepad picture pages, the whole bitmap or metafile will be copied to the Clipboard.

**Note** To delete the contents of the Clipboard, drag and drop it into the Trash.

### To paste an Organizer entry from the Clipboard

You can paste an entire entry that you previously copied to the Clipboard.

1. Go to a section of the same type as the entry that was previously copied to the Clipboard.

2. Choose Edit/Paste, or drag  and drop it over a page within the section.

**Note** Pasting onto a Notepad picture page will replace the current bitmap or metafile.

### To copy Organizer text to the Clipboard

You can copy the text in any entry to the Clipboard. For example, you may want to copy only some of the text on a Notepad page.

1. Click the entry containing the information you want to copy.
2. Select the text you want to copy.

3. Choose Edit/Copy .

**Note** You can also press CTRL+INS in Windows 3.0 or CTRL+C in Windows 3.1 to copy selected text to the Clipboard.

### To paste Organizer text from the Clipboard

You can paste text into any entry from the Clipboard.

1. Create a new entry such as a Notepad text page or a Calendar appointment.
2. Place the insertion point where you want to paste the text.
3. Choose Edit/Paste, or drag and drop the Clipboard from the Toolbox on the entry.

Any selected text will be replaced by the pasted text.


**Note** The Edit/Paste command may be grayed out if no information of the correct format is available to paste.

**Note** At the current insertion point, you can also press SHIFT+INS in Windows 3.0 or CTRL+V in Windows 3.1 to paste text from the Clipboard.


## Using Mail


You can send and receive messages from the Organizer if you have either of the following applications installed on your computer:

- cc:Mail for Windows, Release 1.1 or higher

**Note**  in your Toolbox and the File/Send Mail command are grayed out if you do not have either of these applications.

### To receive notification of mail

The Organizer checks the mail application every 5 minutes. If you have unread mail,  appears in your Toolbox and flashes five times every 5 minutes to alert you.

You can check your mail by clicking  in your Toolbox. The Organizer then switches to the cc:Mail application.

**Note** The first time the Organizer checks for mail, the mail application may prompt you for your mail password.

### To send mail using the Toolbox Mail icon

1. Click  in the Toolbox.

The Organizer displays the cc:Mail application window.

2. Compose a message and send it as you usually do when you're using cc:Mail.

### To send mail using File/Send Mail

You can also send mail using File/Send Mail. If you copy information to the Clipboard, you can send it with the mail.

1. Choose File/Send Mail .

The Organizer displays the Send Mail dialog box.

2. If you have text on your Clipboard that you want to mail, select "Send Clipboard contents."
3. Choose OK.

The Organizer displays the mail-application dialog box.


4. Fill in the appropriate information and choose **Send**.

### To send mail using drag and drop

1. Drag and drop the information you want to mail onto  in the Toolbox.

**Note** You can't drag and drop a Planner event or anniversary.

The Organizer displays the mail-application dialog box.

**Tip** You can also mail the Clipboard contents by dragging  on



2. Fill in the appropriate information and choose **Send**.

**Note** When you send mail using drag and drop, you're actually using the Clipboard. The Clipboard will contain a copy of the entry you mail.



## Using Dynamic Data Exchange (DDE) Links

Dynamic Data Exchange (DDE) is a Microsoft Windows facility that allows you to transfer information between Windows applications that support DDE.

You can use DDE to display information on an Organizer Notepad page in bitmap, metafile, or text format. For you to create or edit a DDE link, both the application containing the original information (such as 1-2-3) and the application using the information (such as the Organizer) must be active at the same time. For information on bringing information into the Notepad section using DDE links, see [Bringing in Information from Other Applications](#).

If you bring in information such as a 1-2-3 graph and then you make changes to the original graph, your copy is automatically updated. If you edit the original information in the application, the changes can be automatically reflected on the Notepad page.

If you make changes to the text on a DDE Notepad page, the Organizer asks you if you want to send the changes back to the source DDE application. The source application needs to be open if you want to save these changes.

**Note** Not all Windows applications allow you to save changes back to the source DDE application. For information, see the application's documentation.

Any changes you make to the information in the source file are automatically reflected in the Organizer file as long as the link is active. If the source DDE application is not active, the page displays a warning message.

**Tip** If you select "Keep copy" in the Notepad Page Edit dialog box, a copy of the information is displayed. When you turn to the page with the information, the Organizer updates the information from the DDE application if it is active.

See also:

[Using DDE Links to Bring Information into the Organizer](#)

## Using DDE Links to Bring Information into the Organizer

The following procedure explains how to bring information into the Organizer from another Windows application. If you have 1-2-3 for Windows, you can use the sample files provided to set up a DDE link.

1. Start or switch to the application (such as 1-2-3 for Windows), and open the file that contains the original information that you want to bring into the Organizer.

For example, you can open the SAMPLE.WK3 file in the \ORGANIZE\SAMPLE directory.

**Note** If you're creating a new file or have made edits to an existing file, make sure you save the file before proceeding to the next step.

2. In the source application, select the information that you want to copy to the Organizer file.

For example, select the spreadsheet cells A2:C4 in SAMPLE.WK3.

3. Choose Edit/Copy to copy the information to the Windows Clipboard.

**Note** Leave the source application running. You can minimize the application's window to an icon.

4. Start or switch to the Organizer and open the Notepad section that you want to contain the information.

5. Create a new Notepad page with an appropriate title.

6. Select the **Type** of information you wish to paste from the other Windows application.

For example, if you want to bring in information from a 1-2-3 worksheet, select "Text."

7. Select "DDE" in the **From** list.

8. Choose OK.

9. If necessary, click the page entry in the table of contents to turn to the page.

10. Click the page and choose Edit/Paste DDE Link.

The information appears on the Organizer page.

**Note** The Paste DDE Link option is grayed out if no DDE link is available from the source application.

### To display a 1-2-3 graph

1. Start or switch to 1-2-3 for Windows, and open the file that contains the original information that you want to bring into the Organizer.

For example, you can open the SAMPLE.WK3 file in the \ORGANIZE\SAMPLE directory.

2. Select the graph that you want to copy to the Organizer file.

For example, select the graph in cells E2:H18.

3. Choose Edit/Copy to copy the graph to the Windows Clipboard.

**Note** Leave the source application running. You can minimize the application's window to an icon.

4. Start or switch to the Organizer, and open the Notepad section that you want to contain the information.

5. Create a new Notepad page with an appropriate title.

6. Select "Bitmap" for **Type**.

7. Select "DDE" in the **From** list.

8. Choose OK.

9. If necessary, click the page entry in the table of contents to turn to the page.

10. Click the page and choose Edit/Paste DDE Link.

The graph appears on the Organizer page.

### **To update the source DDE information**

When you're using DDE links, you can send text changes back to the source application. For example, you can update the numbers in a 1-2-3 worksheet.

1. Turn to a Notepad text DDE page.

For example, if you used the SAMPLE.WK3 file, turn to the page containing the worksheet.

2. Click the page and edit the numbers.

3. Click the title to save the changes.

The Organizer asks if you want to send the changes back to the source application.

4. Choose **Yes** to update the source application.

If you're working with the sample file SAMPLE.WK3, the graph displays the changes.

5. Switch to the source application to see the changes.

**Tip** If you've created DDE links with the SAMPLE.WK3 file for the worksheet and graph as explained in the previous section, you may want to place these pages side by side before you update the source DDE information. You can click the Notepad section tab to display the table of contents, then drag and drop the pages to rearrange them. For information, see [Adding a Notepad Page](#).

## Importing Records into Your Address Section

You can import addresses directly into your Address section. For example, you might have an address list in your word processor or database application that you want to use in the Organizer.

The Organizer imports in a number of formats, including dBase II®, dBase III®, dBase IV®, Windows Cardfile, and ASCII (CSV, or Comma Separated Values). Most databases, word processors, and spreadsheets export data in one of these formats. ASCII (CSV) is a simple ASCII text format in which each field is separated by commas, each field starts and ends with double quotation marks, and records are separated by a carriage return and a line feed (CR/LF).

### To import names and addresses

1. Click the Address section tab.
2. Choose File/Import.  
The Organizer displays the Import dialog box.
3. Specify the section into which you want to import the information (the currently open section is the default).
4. Specify the import format (such as ASCII [CSV]) and the file you want to import. Type the path and filename, or use the **Directories** list box to locate the file and select it from the **Files** list.
5. Choose **Options**.  
The Organizer displays the Import/Export Options dialog box.
6. Select the appropriate options.

#### Field names as first record

Imports field names first. Choose this option if you're importing in ASCII (CSV) format and the field names are at the beginning of the file.

#### File translation

Translates characters exported from DOS or from computers configured for different character sets. Select the appropriate format.

7. Choose OK to return to the Import dialog box.
8. Choose OK from the Import dialog box.

The Organizer displays the Field Mapping dialog box.

#### Source fields

Displays the first record to be imported from the source file, divided into its fields.

#### Fields in section

Displays all the fields in the Organizer's Address template.

#### Map all

Connects each source field in sequence to each section field. This option is useful when importing data exported from another Organizer file.

9. Map the fields in the source field to the appropriate fields in the Address template by selecting a source field, then selecting the Address section field for the source field to import into. Or, choose **Map all** to connect all the fields in sequence.

A line between the fields shows where the source data will appear in the Organizer file. For example, you can map "Field1" to "Title" so "Ms." would import into the **Title** field.

If no source data is available for a particular field, you don't need to map it. If addresses within your source file are split among multiple fields, you should map each of them to the Organizer Address field, where they will be automatically combined.



**Note** If you map to the wrong section field, select the correct section field before you map the next field. If you map the wrong source field, click the source field to break the mapping, and then resume the mapping process.

10. Choose **Import**.

A status box indicates importing progress.

11. When importing is complete, choose OK to confirm the number of records the Organizer has imported.

dBase II, dBase III, and dBase IV are registered trademarks of Borland International, Inc.

## Exporting Records from Your Address Section

You might want to export your addresses for use in another application or for use in the Address section of another Organizer file.

For example, you might want to export your customer addresses for use in a database or a list of employees for an internal company phone book. You can also export your Organizer addresses to a file that your word processor can use in a mail merge.

When you perform a mail merge, multiple copies of the same letter are printed. The copies are identical except for a few special fields that contain the specific names and addresses of the recipients.

You can use the records in your Address section to carry out mail merge with most word processing programs.

If you're using addresses in another application, be sure you export them in a format that the application understands.

**Note** Most applications support the ASCII (CSV) file format. For information, see the application's documentation.

The following procedure describes how to export Organizer addresses for a mail merge. The sections that follow describe specific procedures for mail merge with Ami Pro 2.0, Ami Pro 3.0, Microsoft Word for Windows 2.0, and WordPerfect® for Windows 5.1.

**Note** If a letter already contains fields from another mail merge, you may need to strip out those fields before you can proceed with the Organizer mail merge. This is necessary if the field names contained in the letter are not the same as the field names that are exported by the Organizer or that are contained in an Ami Pro description file.

### To export addresses for a mail merge

1. Click the Address section tab.

**Note** You can use **Filter** to export a subset of your addresses. For more information, see [Finding Names and Addresses](#).

2. Choose File/Export.

The Organizer displays the Export dialog box.

3. Specify the name of the file to which you want to export the address records, and select the appropriate format.

4. Choose **Options**.

The Organizer displays the Import/Export Options dialog box.

5. If your application cannot interpret CR/LF characters within multiline fields (for example, Microsoft Word for Windows 2.0 and WordPerfect for Windows), deselect "Change CR/LF to CR."
6. If your application can accept field names as the first record in the data file (for example, Ami Pro 3.0 and Microsoft Word for Windows 2.0), select "Field names as first record."
7. If you're exporting to a non-Windows word processor or need to translate characters to different character sets in other countries, select the appropriate format for **File translation**.
8. Choose OK to return to the Export dialog box.
9. Choose OK from the Export dialog box.

The Organizer displays the Field Mapping dialog box.

#### **Fields in section**

Displays all of the Address template fields.

#### **Export file field**

Displays the order in which the fields appear in the export file.

10. Select **Map all** to map all the fields in the Organizer Address template to the fields in the destination file.

**Note** If you require the fields in a different order you can map them individually. Select a field name. Then select an export file field to map fields.

11. Select **Export**.
12. When exporting is complete, choose OK to confirm the number of records the Organizer has exported.
13. Switch to your word processing program and proceed with the mail merge.

### **To use mail merge with Ami Pro 2.0**

1. Create your letter using Ami Pro 2.0.

You can experiment with the MAILMRG.SAM file provided in the \ORGANIZE\SAMPLE directory.

2. Set up your letter to receive the exported records from the Organizer by choosing Edit/Insert/Merge Field. Then choose **Data File**.
3. Type the name of the file that contains the addresses you exported from the Organizer and choose OK.

For example, you can specify ADDRESS.CSV from the \ORGANIZE\SAMPLE directory. Ami Pro then alerts you that this file is not an Ami document.

4. Choose OK.
5. Specify a **Description** file and choose OK.  
For example, you can specify DESCRIPT.SAM from the \ORGANIZE\SAMPLE directory.
6. To insert fields, place the text insertion point where you want to insert a merge field in your letter. Select a merge field name and choose **Insert**.

Repeat this step for each merge field.

**Note** The MAILMRG.SAM sample file already has the merge fields inserted.

7. When you've inserted all the merge fields, choose **Cancel**.
8. Choose File/Merge, select your required options, and then choose OK.  
Ami Pro then merges the two documents as specified.

### **To use mail merge with Ami Pro 3.0**

1. Create your letter using Ami Pro 3.0.

You can experiment with the MAILMRG.SAM file provided in the \ORGANIZE\SAMPLE directory.

2. Set up your letter to receive the exported records from the Organizer by choosing File/Merge.  
Ami Pro displays the Welcome to Merge dialog box.
3. Select step 1 and choose OK.  
Ami Pro displays the Select Merge Data File dialog box.
4. Select **List files of type** and choose "Comma delimited." Select the filename of your exported addresses.

For example, you can specify ADDRFLDS.CSV in the \ORGANIZE\SAMPLE directory. Ami Pro displays the Merge Data File Fields dialog box.

5. Select "Field names in first record of data file" and choose OK.

Ami Pro returns to the Welcome to Merge dialog box.

6. Select step 2 and choose OK.

Ami Pro asks if you want to use the current document.

7. Choose **Yes** to use the currently open letter or **No** to create another one.

Ami Pro displays the Insert Merge Fields dialog box.

8. Place the text insertion point where you want to insert a merge field in your letter. Select a merge field name and choose **Insert**. Repeat this step for each merge field.

**Note** The MAILMRG.SAM sample file already has the merge fields inserted.

9. Choose **Continue Merge** when you have finished.

Ami Pro returns to the Welcome to Merge dialog box.

10. Select step 3 and choose OK.

Ami Pro displays the Merge dialog box.

11. Select the required options and choose OK.

### **To use mail merge with Microsoft Word for Windows**

1. Create your letter using Microsoft Word for Windows.

You can experiment with the MAILMRG.DOC file provided in the \ORGANIZE\SAMPLE directory.

2. Set up your letter to receive the exported records from the Organizer by choosing File/Print Merge.

Microsoft Word displays the Print Merge Setup dialog box.

3. Choose **Attach Data File**.

Microsoft Word displays the Attach Data File dialog box.

4. Select **List Files of Type** and choose "All Files." Select the filename of your exported addresses.

For example, you can specify ADDRESS.TXT from the \ORGANIZE\SAMPLE directory.

5. Place the text insertion point where you want to insert a merge field in your letter, and choose **Insert Merge Field** from the ruler.

Microsoft Word displays the Insert Merge Field dialog box.

6. Select a merge field name and choose OK.

**Note** The MAILMRG.DOC sample file already has the merge fields inserted.

7. Repeat steps 5 and 6 for each merge field.

8. Choose File/Print Merge.

Microsoft Word displays the Print Merge Setup dialog box.

9. Choose **Merge**.

Microsoft Word displays the Print Merge dialog box.

10. Select the required options and choose OK.

### **To use mail merge with WordPerfect for Windows**

1. From WordPerfect for Windows, choose File/New.

2. Choose Tools/Merge/Merge.

WordPerfect displays the Merge dialog box.

3. Type a filename or select the **Primary File**, which is the letter that contains the text you want to merge.

For example, you can experiment with MAILMRG.WP in the \ORGANIZE\SAMPLE directory.

4. Type a filename or select the **Secondary File**, which is the data to merge.

For example, you can specify ADDRWP.CSV in the \ORGANIZE\SAMPLE directory.

5. Select the **ASCII Delimited Text (DOS)** option.

WordPerfect displays the Text File Delimiter dialog box.

6. Select **Field Delimiters Begin** and type a double quotation mark (").

7. Select **Field Delimiters End** and type a double quotation mark followed by a comma (",).

8. Select **Record Delimiters End**.

9. Move the insertion point after the [CR].

10. Select Line Feed from the pop-up list at the end of the field.

11. Choose OK.

A new document is created containing the merged letters.

WordPerfect is a registered trademark of WordPerfect Corporation.

## Printing

You can print information from any section in the Organizer on a variety of paper layouts, ranging from side-by-side pages for physical organizers to mailing labels. You can use the Organizer's predefined layouts or customize your own. You can output the information just as it looks on screen or in a plain, text-only format.

### You use the Organizer to:

- Select and set up your printer
- Select printing options
- Select specific options for printing from the Calendar, To Do, Address, Notepad, Planner, and Anniversary sections
- Customize your page layouts

**Note** The Organizer uses Microsoft Windows 3.0 and 3.1 printer drivers to generate output. Printer drivers are installed and configured in the Windows Control Panel. For specific instructions on installing printer drivers, see the *Microsoft Windows User's Guide*.

## Selecting a Printer

The Organizer allows you to select a printer for the current entry in the current section. You can specify a printer other than the one the Organizer recognizes as the default printer. The printer you choose determines the fonts that are available when you print.

### To select a different printer than the one specified in the Windows Control Panel

1. Choose File/Printer Setup .

The Organizer displays the Printer Setup dialog box.

2. Select the printer you want and choose OK.

### To set up your printer

1. If you want to specify printer set-up options, choose File/Printer Setup, then **Setup**.

The Organizer displays the Printer dialog box.

2. Change any of the settings as necessary.
3. Choose OK.

**Note** The printer you select in Printer Setup is the default printer for all your printing. However, you can specify a particular printer for a specific paper layout. For information, see [Customizing Your Page Layout](#).

### To stop printing

- Choose **Cancel** in the Printing status box.

## Selecting Printing Options

When you print from the Organizer, you need to specify the type of paper in your printer, the format of the output, and the range of information you want to print.

**Note** For tips on printing from specific Organizer sections, see [Printing from Specific Sections](#).

### To select print options

1. Choose File/Print .

The Organizer displays the Print dialog box.

2. Select the section that contains the entries you want to print, from the **Section** list box.

**Note** If the Organizer is open to a particular section, this will be the default section.

3. Select the **Paper** layout you want.

The layout can be for a standard paper supported by your printer, such as Letter or A4, or a customized paper layout such as Day-Timer or 2x7 labels. The default paper layout is Letter 8½ x 11 in.

4. Select the type of **Format output** you want.

#### **On screen**

Prints the output formatted as you see it on the screen. The Organizer fits as much information as possible on the paper, using the fonts and layout for the selected paper type.

#### **All entries**

Prints all the information with a default format, including information that is not visible on screen. For example, if you display a day per page in the Calendar but have to scroll through your entries on screen to see them all, "All entries" prints all the appointments, including the ones not displayed. However, from the Calendar section, you cannot print To Do tasks, Planner events, or anniversaries displayed using Options/Calendar/Show.

#### **Labels**

Prints information in rows and columns, such as for mailing labels. In the Address section, the following fields are printed: Title, First Name, Last Name, Position, Company Name, Address, and Zip Code.

**Note** For information on printing address labels, see [Printing from Specific Sections](#) and [Customizing Your Page Layout](#).

5. Specify the range of information you want to print in **Range From** and **Range To**, or choose **All** to print all information in a section.

**Note** For information on printing ranges for a particular section, see [Printing from Specific Sections](#).

6. If you want to print more than one copy, select **Copies** and type the number you want to print.

7. Select one or more of the following printing options:

#### **Draft**

Prints at a lower resolution without graphics and is generally faster. This may not be supported by your printer.

#### **Double-sided**

Prints on both the front and back of the paper. The Organizer automatically prompts you to turn over the paper and reinsert it into the printer.

#### **Use color**

Prints in color on a color printer.



**Collated**

Prints more than one copy of multiple pages in sequence.


**Missing labels**

Specifies the number of labels missing from the first sheet on which you're printing. For example, the last time you printed labels, you may have used only three labels on the last sheet. You can have the next set of labels begin printing where the previous one left off so you won't waste labels.

## Printing from Specific Sections

You have a variety of information you can print from the Organizer. This topic contains tips for printing entries from each section, such as one day of Calendar appointments, a formatted name and address list, or a specific set of To Do tasks.

### To print from any of the Organizer's sections

1. Choose File/Print .
2. Select the **Section** from which you want to print.
3. Select the **Paper** type.
4. Select the appropriate options for the specific section, as described below.
5. Choose OK.

### To print Calendar appointments and meetings

To print one day from the Calendar section:


- Choose Options/Calendar and then choose **View**. Change the Calendar view to "Day per page." Drag and drop the appointment over the Printer icon in the Toolbox. Select the appropriate **Paper** layout.

To print more than one day from the Calendar section:

- Choose File/Print and type the dates you want in **Range From** and **Range To**. Select the appropriate **Paper** layout.

### To print To Do tasks

To print all pages in the To Do section, do *one* of the following:

- Choose File/Print and select "On screen" for **Format output as**. Then select "All."
- Click the printer icon , then for **Range** select "All."


To print a specific set of To Do tasks:

- Choose File/Print and select "All entries" for **Format output as**. Type the appropriate dates for **Range From** and **Range To**.

### To print Address records

Addresses are printed in the order in which they are sorted. You can change the sort order if you click the Address section tab and click the appropriate sort icon below the Toolbox. For information, see [Changing the Sort Order](#).

To print one complete record in the Address section:

- Click  below the Toolbox to display one address per page before printing. Drag and drop an address on



in the Toolbox.

To print a sequence of records in the Address section:

- Choose File/Print and the letter tab you want to print for **Range From**. Then type the last letter tab you want to print for **Range To**. You can enter letters or the actual record numbers. For example, records 1-15 might be Adams through McLean. You can specify a range of A to M or 1 to 15.

To print a selected subset of records in the Address section:

- Click the Address section tab. Type the information you want to match. For example, type **\*Atlanta** in the Address field. Then choose **Filter**.

To print a formatted name, address, and phone-number list:

- Choose Options/Address and then select "Continuous." For **View**, select "Address" so the Organizer displays two records per page. Choose File/Print and select the required **Paper**. Select "On screen" for **Format output as**, and specify a range.

**Tip** To print records without the record number and border, select "Draft."


To print all the address information in an unformatted list:

- Choose File/Print, select "All entries" for **Format output as**, and specify a range.

To print labels:

- Choose File/Print and select a label layout for **Paper**, such as "2x7-Labels." Select "Labels" for **Format output as**.

### To print Notepad pages

- Choose File/Print and select "On screen" for **Format output as**. Type the page number for **Range From** and **Range To**. Drag and drop the page on  in the Toolbox.

To print more than one page:

- Choose File/Print and specify the page numbers for **Range From** and **Range To**.

To print all pages:

- Choose File/Print and specify "All" for **Range**.

To print folded Notepad pages:

- Choose File/Print and select "Landscape 11 x 8½ in" for **Paper**.

### To print Planner events

- Choose File/Print and select "Landscape 11 x 8½ in" for **Paper**.

**Note** You need to print Planner charts using a landscape orientation.

To print a chart for one year:

- Turn to the year you want to print and click the Printer icon.

To print charts for multiple years:

- Choose File/Print and specify the years you want for **Range From** and **Range To**.

### To print Anniversaries

- Choose File/Print and select "All entries" for **Format output as**. Type the first date you want to print for **Range From** and the last date you want to print for **Range To**.

## Customizing Your Page Layout

The Organizer comes with many predefined page layouts for printing letters, labels, or pages for manual organizers such as Day-Timers.

You can do one of the following to create your own page layout:

- Edit an existing layout
- Copy and then edit an existing layout
- Create your own customized layout
- Select fonts for your page layout

The Organizer lets you specify paper size, margins, fonts, rows, and columns, as well as headers and footers. Any customized layouts that you create are stored in your Windows directory with a .PLT extension.

### To create your own page layout

1. Choose File/Page Setup .

The Organizer displays the Paper Layouts dialog box.

2. Choose the most efficient way to customize your layout:
  - To edit an existing layout, select the layout you want and choose **Edit**.
  - To base the new layout on an existing layout, select the layout you want and choose **Copy**.
  - To create an entirely new layout, choose **New**.

The Organizer displays the Page Setup dialog box. A graphical representation of the layout appears on the left side of the box.

3. Type a **Name** for the layout, if you're creating a new one, or if it's a copy of an existing layout.
4. To enter a header or a footer, type any text that you want to display for **Header** and **Footer** as well as the appropriate commands. If you do not want a header or a footer, leave these fields blank. For more information, see [Header and Footer Commands](#).

For example:

#### **Type this**

&l Weekly appointments &d  
&l&D Addresses &t  
12:04  
&s printed on &d

#### **To print this**

Weekly appointments 9/14/93  
Monday, July 6th, 1993 Addresses  
Calendar printed on 9/14/93

5. Select the appropriate **Orientation**.

#### **Portrait**

Prints information across the width of the page.

#### **Landscape**

Prints information across the length of the page. For example, specify "Landscape" when you're designing a layout for a Planner chart.

**Note** The orientation for the paper layout always overrides the current printer settings.

6. Select the appropriate **Page** dimensions.

- If you want to use a standard paper size, select a **Paper** from the list.

- If you want to customize your paper dimensions, type the appropriate values for **Width** and **Height**. Select "Centimeters" or "Inches" to determine the unit of measurement for these dimensions.

7. Specify the appropriate **Margins**.

**Note** You can also drag the margin guides in each corner of the preview window. The print area is gray. As you drag the margin guides, the values in the margin fields change.

**Top**

The measurement from the top of the paper to the top of the print area.

**Left**

The measurement from the left edge of the paper to the left side of the print area.

**Right**

The measurement from the right edge of the paper to the right side of the print area.

**Bottom**

The measurement from the bottom of the paper to the bottom of the print area.

8. Specify the appropriate **Layout** options.

**Columns**

The number of columns required for labels or side-by-side printing.

**Rows**

The number of rows required for labels or side-by-side printing.

**Width**

The width is automatically adjusted according to the number of columns and the margin measurements. You can specify your own width if you have more than 1 column.

**Height**

The height is automatically adjusted according to the number of rows. You can specify your own height if you have more than 1 row.

**Note** You can type a smaller measurement to create a gutter between columns or rows. You can also drag the column/row line left/right or up/down to create gutters. If you specify more than one row and/or column, click in the preview window to zoom in. You can also drag the column/row guides in the preview window. The print area is gray. As you drag the guides, the values in the margin fields change.

**Side-by-side pages**

Prints more than one Organizer page on a sheet of paper.

**Note** Use this option when printing onto paper specific to a manual organizer such as Day-Timer® Junior Desk or Franklin Day Planner®, where a sheet of paper is split into two pages. The Organizer automatically sequences your information correctly on the front and back of the pages.

9. Specify the appropriate **Internal margins**.

Use these options to create a small space between the paper's margins and the actual print area. You might want to set internal margins to avoid printing over prepunched holes or preprinted information.

**Note** When you have more than one row and/or column, click the preview window to zoom in. You can drag the print-area handles in the preview window. The print area is gray. As you drag the handles, the values in the internal-margin fields change.

**Top**

The measurement from the top margin of the paper to the top of the print area.

**Left**

The measurement from the left margin of the paper to the left side of the print area.

**Right**

The measurement from the right margin of the paper to the right side of the print area.

**Bottom**

The measurement from the bottom margin of the paper to the bottom of the print area.


10. Choose **Printer** to select a specific printer to use with this paper layout only.

**Note** This enables you to have one type of paper in one printer and another in a second printer. The Organizer automatically selects the correct printer to use when it prints using this layout. If you do not specify a printer, it uses the current default printer.

11. Choose **Test** to print a sample of your new layout.
12. When your layout is complete, choose OK twice.

**To select a font**

A font is a specific typeface of a particular size, such as Times 12 point or Helvetica 10 point. Fonts determine how characters look on the screen and in print. You can use font mapping to specify a font when you print information from the Organizer.

1. Choose File/Page Setup .
  2. Select a paper layout and choose **Edit**.
  3. Select **Fonts**.
- The Organizer displays the Font Mapping dialog box.

**Screen font**

Displays different components of the Organizer and their built-in screen fonts.

**Printer font**

Displays a list of printer fonts.


**Printer fonts only**

Selects only the fonts installed on your printer.

4. Map a component and screen font on the left with the appropriate printer font on the right by selecting the screen font, then the printer font and size.
5. Choose OK twice to save your changes.

**To design a label layout**

The Organizer provides several predefined label layouts. If none of these is suitable, you can design your own.

1. Choose File/Page Setup .
- The Organizer displays the Paper Layouts dialog box.
2. Choose the most efficient way to create your layout:
    - To edit an existing layout, select the layout you want and choose **Edit**.
    - To base the new layout on an existing layout, select the layout you want and choose **Copy**.
    - To create an entirely new layout, choose **New**.

The Organizer displays the Page Setup dialog box. A graphical representation of the layout appears in the left side of the box.

3. Type a **Name** for the new layout, if you're creating a new one, or if it's a copy of an existing layout.
4. Select the appropriate **Page** dimensions.
  - If you want to select a standard paper size, select a **Paper** from the list.
  - If you want to customize your paper dimensions, type the appropriate values for

**Width and Height.** Select "Centimeters" or "Inches" to determine the units of measurement for these dimensions.

**Note** Most labels come on standard US Letter/A4 size sheets.

5. Specify the appropriate margins.

**Note** You can also drag the margin guides in each corner of the preview window. The print area is gray. As you drag the margin guides, the values in the margin fields change.

6. Select the appropriate **Layout** options.

For example, a layout for address labels might be two columns wide and seven rows high.

7. Specify a small value for the **Internal margins**.

**Note** To provide a small gap between the edge of the label and the printed text, specify 0.15 inch.

**Note** When you have more than one row and/or column, click the preview window to zoom in. You can drag the print-area handles in the preview window. The print area is gray. As you drag the handles, the values in the internal-margin fields change.

8. Choose **Test** to print a sample of your new layout.

9. When your layout is complete, choose OK twice.

## Header and Footer Commands

When you enter a header or footer, you can type the text as well as the appropriate command.

**Note** You can type as many commands as you need, in any sequence. The font selection applies to the entire header or footer. The justification settings apply to the text that follows the command.

<b>Command</b>	<b>Action</b>
&d	Displays the current date in short format (for example, 9/14/93). The date is set in the Windows Control Panel.
&D	Displays the current date in long format (for example, Thursday, September 14, 1993). The date is set in the Windows Control Panel.
&t	Displays the current time. Time is set in the Windows Control Panel.
&p	Displays page numbers.
&f	Displays the name of the Organizer file.
&F	Displays the full pathname for the Organizer file.
&l	Left-justifies all header or footer text that follows.
&r	Right-justifies all header or footer text that follows.
&c	Centers the text that follows.
&v	Displays the Organizer release.
&s	Displays the section name.
&a	Displays the paper name. For example, you might want to create a layout named Things to Do Today.
&b entries,"	Displays the option you selected for <b>Format output as</b> ("On screen," "All "Labels," "Test").
&0	Displays the header or footer text mapped to Screen Font: Normal.
&1	Displays the header or footer text mapped to Screen Font: Titles.
&2	Displays the header or footer text mapped to Screen Font: Contents.
&3	Displays the header or footer text mapped to Screen Font: Months.
&4	Displays the header or footer text mapped to Screen Font: Calendar.
&5	Displays the header or footer text mapped to Screen Font: FAX/Phone.
&& want a	Displays the symbol "&" in the header or footer text. For example, if you header Names & Addresses, type <b>Names &amp;&amp; Addresses</b> .




## **Missing Labels**

Specifies the number of labels missing from the first sheet you're printing on. For example, the last time you printed labels, you may have used only three labels on the last sheet. You can have the next set of labels begin printing where the previous one left off so you won't waste labels.

## To Select a Font

A font is a specific typeface of a particular size such as Times 12 point or Helvetica 10 point. Fonts determine how characters look on the screen and in print. You can use font mapping to specify a font when you print information from the Organizer.

1. Choose File/Page Setup .
2. Select a paper layout and choose **Edit**.
3. Select **Fonts**.  
The Organizer displays the Font Mapping dialog box.

### **Screen font**

Displays different components of the Organizer and their built-in screen fonts.

### **Printer font**

Displays a list of printer fonts.

### **Printer fonts only**

Selects only the fonts installed on your printer.

4. Map a component and screen font on the left with the appropriate printer font on the right by selecting the screen font, then the printer font and size.
5. Choose OK twice to save your changes.

## **File Commands**

### **New** (CTRL+N)

Creates a new file that has the default sections and options.

### Open (CTRL+O)

Opens an existing file.

### **Close**

Closes the current file. You can close a file without leaving the Organizer. If you made changes to the file, the Organizer asks whether you want to save those changes before it closes the file. If you choose to save your changes but haven't already named the file, the Save As dialog box appears.

### Save (CTRL+S)

Saves the current file.

### Save As

Saves the current file under a different name or to another location. The file created with the Save As command becomes the active file.

### **Revert to Saved**

Cancels any changes you made to an Organizer file and returns you to the last saved version of the file.

### Import (CTRL+I)

Brings in information from another application.

### Export (CTRL+E)

Saves Organizer information in a format that can be used in other applications.

### Include

Selects a section from another Organizer file to display in your current file. The included section is read-only.

### Reference

Links to another application or file. This command is available only during linking.

### Passwords

Creates passwords for files.

### Send Mail

Sends a message if Lotus Notes, Release 2.1 or higher, or cc:Mail for Windows, Release 1.1 or higher, is installed on your computer.

### Page Setup

Copies, edits, removes, or creates a paper layout.

### Print (CTRL+P)

Prints information from the current file.

### Printer Setup

Specifies the default printer to use when printing from the Organizer.

### Exit (ALT+F4)

Leaves the Organizer and closes the Organizer window. If you have made changes to your file since you last saved it, you are prompted to save your changes. Choose **Yes** to save the changes, **No** to discard them, or **Cancel** to continue working without saving your changes.



## File Open

Opens an existing file; the Organizer displays the File Open dialog box.

**Note** If you are not using group scheduling, the Organizer displays a list of files instead of the names in the Directory. "Files" is selected under **List as**.

Choose Files or Names and then make your selections from the dialog box that appears.

- Select "Files" to use Organizer on a stand-alone system or to open a specific file.
- Select "Names" to address users by their unique user name on the network.

If you are using Organizer, Release 1.1, with group scheduling, you will usually select your own name. If you have other Organizer files that you don't use to schedule meetings, open them by filename.

If the file you select has a password, the Organizer prompts you to enter the password. In Release 1.1, with group scheduling, your Organizer file is accessible to other users on the network. If you don't set a password, other people can easily view your Organizer file. For information, see [Using Passwords](#).

**Note** If the file contains an included section that cannot be located, the Organizer displays the File Open dialog box. Choose **Cancel** to open the file without the included section, or locate and select the correct included file and choose OK.

### Files:

#### Open

Type the name of the file you want to open.

#### Files

Lists files in the current directory that match the extension specified in the Open field. You can type a filename in the Open field or select a filename from the list. To display files with a different file extension, type the new extension and click OK.

#### Directories

Lists the available drives and directories. Select **[..]** to move up a directory level.

#### Add to File menu

Adds the selected filename to the end of the File menu so you can select it easily. To remove a filename previously added to the File menu, hold down SHIFT and select the filename.

#### Open automatically

Specifies the file to be opened automatically every time you start the Organizer.

### Names:

#### Open

Type a unique user name to open your own or another user's Organizer file.

#### Name

Lists names in the current Directory. You can type a name in the Open field or select a name from the list.

#### Groups

Lists the available directories.

#### Add to File menu

Adds the selected name to the end of the File menu so you can select it easily. To remove a name previously added to the File menu, hold down SHIFT and select the name.

#### Open automatically

Specifies the file to be opened automatically every time you start the Organizer.

See also:

[Saving an Organizer File](#)

[Starting and Stopping the Organizer](#)

## **File Save As**

Saves the current file under a different name or to another directory or drive. Make your selections from the File Save As dialog box.

### **File**

Specifies the path and name for the file. Type a filename or select a filename from the **Files** list.

### **Files**

Lists files in the current directory that have an .ORG extension. Select a filename from the list if you want to replace it with the current file.

### **Directories**

Lists the available drives and directories to which you can save the current file. Select **[..]** to move up a directory level.

See also:

[Saving an Organizer File](#)

## **File Import**

Reads information from a file created by another application. Make your selections from the File Import dialog box.

### **Into section**

Specifies the section into which you want to import information in the Organizer notebook.

### **Import format**

Specifies the file format of the imported information.

You can import files that are exported from other applications to the following formats: dBase II, dBase III, dBase IV, Windows Cardfile (into the Address section), Organizer (between .ORG files), and ASCII CSV (Comma Separated Variables). CSV format is an ASCII text file format in which each field is separated by commas, each field starts and ends with double quotation marks, and records are separated by a carriage return and a line feed (CR/LF).

### **Import file**

Specifies the name of the file you want to import. Type a filename or select a filename from the **Files** list.

### **Files**

Lists all files in the specified directory in the specified import format.

### **Directories**

Lists the available drives and directories. Select **[..]** to move up a directory level.

### **Options**

Displays the Import/Export Options dialog box. You can change CR/LF format to CR only, specify to import field names as the first record, or specify file translation for different character sets.

When you choose OK, the Organizer displays the Field Mapping dialog box.

## **Field Mapping**

Specifies how fields in the source file correspond to fields in the target Organizer file.

### **Source fields**

Lists the available fields in the import file along with information from the first record in the field.

### **Fields in section**

Lists all the fields that are used in the selected section. Each section in the Organizer has a collection of fields that represents the information required for each entry in a section.

### **Map all**

Connects each import-file field with the appropriate section field. You can import CSV and dBase files to any section.

### **Clear**

Clears the mapped fields.

See also:

[Importing Records into Your Address Section](#)



## **File Export**

Writes Organizer information in a file format of another application. Make your selections from the File Export dialog box.

### **From section**

Specifies the section of the Organizer notebook from which you want to export information.

### **Export format**

Specifies the file format of the exported information.

You can export to the following formats: dBase II, dBase III, dBase IV, Windows Cardfile (from the Address section), Organizer (to export to another .ORG file), and ASCII CSV (Comma Separated Variables). CSV format is an ASCII text file format in which each field is separated by commas, each field starts and ends with double quotation marks, and records are separated by a carriage return and a line feed (CR/LF).

### **Export file**

Specifies the name of the file to which you want to export. Type a filename or select a filename from the **Files** list.

### **Files**

Lists all files in the specified directory in the specified export format.

### **Directories**

Lists the available drives or directories. Select **[..]** to move up a directory level.

### **Options**

Displays the Import/Export Options dialog box. You can change CR/LR format to CR only, specify to export field names as the first record, or specify file translation for different character sets.

When you choose OK, the Organizer displays the Field Mapping dialog box.

## **Field Mapping**

Specifies how fields in the Organizer source file correspond to fields in the target file.

### **Fields in section**

Lists the fields available in the selected section. Each section in the Organizer has a collection of fields that represents the information required for each entry in a section.

### **Export-file field**

Lists all fields in the exported file.

### **Map all**

Connects each field in the section with the fields in the file to which you are exporting. You can export CSV or dBase files from any section.

### **Clear**

Clears the mapped fields.

See also:

[Exporting Records from Your Address Section](#)

## **File Include**

Selects a section from another Organizer file for inclusion in the current file. Make your selections from the Include From dialog box.

### **File**

Specifies the file containing the section you want to include. Type a filename or select a filename from the **Files** list.

### **Files**

Lists files in the current directory that have an .ORG extension.

### **Directories**

Lists the available drives and directories. Select **[..]** to move up a directory level.

After you specify a file and choose OK, select the section you want to include from the Include Section dialog box. You are prompted if the file has a password.

**Note** If you want to remove an included section, choose Options/Customize and then choose **Remove**. If you have opened a file as read-only, you cannot remove a section from it.

See also:

[Including Sections from Other Organizer Files](#)

## File Reference

Links to an application or a file created in another application. Once created, the reference appears on the Link menu in the Organizer. You run the file or application by choosing it from the Link menu. Make your selection from the Reference dialog box.

**Note** This command is available only during [linking](#).

### **Description**

Specifies the description that you want to appear on the Link menu.

### **File**

Specifies the path and file to which you want to link. Type a filename or select a filename using **Browse**.

### **Browse**

Selects the directory and file you want to link.

See also:

[Displaying a List of Links](#)

[Linking Information in the Organizer](#)

[Linking to a File or Application](#)

## **File Passwords**

Creates a password for an Organizer file. Use this command to prevent unauthorized access to information. Specify the level of password you want in the Passwords dialog box.

### **Private**

Permits full editing privileges.

### **Public**

Permits full editing privileges, but will not display any confidential entries.

### **Read only**

Permits anyone to view but not edit the information. Confidential entries are not displayed.

See also:

[Using Passwords](#)

## **File Page Setup**

Creates, edits, copies or deletes a new paper layout. Make your selections from the Paper Layouts dialog box.

### **Paper layouts**

Lists all the available paper layouts.

### **New**

Creates a new paper layout. The Page Setup dialog box appears with the measurements for the selected paper layout but no name for the layout.

### **Edit**

Edits the selected paper layout. The Page Setup dialog box appears with the measurements for the selected paper layout.

### **Remove**

Deletes the selected paper layout.

### **Copy**

Creates a copy of the selected paper layout. The Page Setup dialog box appears with the measurements for the selected layout but no name for the layout.

## **Page Setup**

In the Page Setup dialog box you can specify the following options. A graphical representation of the page appears on the left side of the dialog box.

### **Name**

The unique name for the paper layout. Any paper layouts you create are stored in files in your Windows directory with a .PLT extension.

### **Header**

Specifies text and any header commands.

### **Footer**

Specifies text and any footer commands.

### **Orientation**

Specifies either "Portrait" (vertical) or "Landscape" (horizontal) printing.

### **Page**

Specifies page dimensions. Displays **Width** and **Height** for the **Paper** you select. You can specify width or height in "Centimeters" or "Inches."

### **Margins**

Specifies the measurements for the top, bottom, left, and right margins.

### **Layout**

Specifies the number of rows or columns in the layout and their respective width and height. Choose "Side-by-side pages" to print alternate pages from your Organizer notebook onto the same sheet of paper.

### **Internal margins**

Specifies a gap between the actual page margins and the printed area at the top, bottom, left, and right sides of the page.

**Printer**

Assigns a specific printer to this layout. If a printer is not assigned, the current default printer is used.

**Note** Once you specify a printer for a layout, you can't override it using Printer/Setup. To use a different printer, set up a new page layout exactly like the old one, but don't assign a printer to it.

**Fonts**

Selects the fonts used during printing.

**Test**

Prints a sample of the page layout.

See also:

[Customizing Your Page Layout](#)

[To Select a Font](#)

[Header and Footer Commands](#)

## **File Print**

Prints information from any section of the Organizer notebook. Make your selections from the Print dialog box.

### **Section**

Specifies the section that you want to print.

### **Paper**

Specifies the paper layout to use. You can select standard or customized paper layouts. Each paper layout is set up for a specific type of paper.

### **Format output as**

Specifies how your information looks when it is printed.

#### **On screen**

Prints information formatted as you see it on the screen. The Organizer fits as much information as possible using the fonts and layout for the selected paper type.

#### **All entries**

Prints all the information with a default format, including information that is not visible on screen. For example, if you display a day per page in the Calendar but have to scroll through your entries to see them all, "All entries" prints all the appointments, including the ones not displayed. However, from the Calendar section, you cannot print To Do tasks, Planner events, or anniversaries displayed using Options/Calendar/Show.

#### **Labels**

Prints information in a label format. This option is only available in the Address and Notepad sections. Only the following fields are printed: Title, First Name, Last Name, Position, Company, Address, and Zip Code.

### **Range**

Specifies how many pages of the selected section to print. "All" prints all entries. **From** and **To** specify the range of information to print for the section from which you're printing (for example, dates, page numbers, and so on).

### **Options**

#### **Draft**

Quickly prints a copy of your information using the fonts on your printer.

#### **Double-sided**

Prints on both sides of the paper. The Organizer prompts you to turn the paper over.

#### **Use color**

Prints in color on a color printer.

#### **Collated**

Prints one complete copy before starting the next copy.

#### **Missing labels**

Specifies how many labels are missing from the beginning of a label sheet.

### **Copies**

Specifies the number of copies you want to print.

See also:

[Printing](#)

[Printing from Specific Sections](#)

Selecting a Printer

Selecting Printing Options



## **File Printer Setup**

Specifies the default printer you want to use with the Organizer. Select a printer from the list that appears. Choose **Setup** to configure your printer options. Windows provides Help specific to the printer you select.

See also:

[Selecting a Printer](#)

## **File Browse**

Locates an existing file. Make your selections from the Browse dialog box.

### **File**

Specifies the name of the file you want. Type a filename or select a filename from the **Files** list.

### **Files**

Lists files in the current directory that match the extension specified in **File**. To display files with a different file extension, type the new extension and choose OK.

### **Directories**

Lists the available drives and directories. Select **[..]** to move up a directory level.

See also:

[Including Sections from Other Organizer Files](#)

[Bringing in Information from Other Applications](#)

[Control Menu](#)

[Linking to a File or Application](#)

## **How Do I?**

[Display an Alphabetical List of How Do I Topics](#)

[Create Appointments and Schedule Meetings](#)

[Maintain a To Do List](#)

[Manage a Name and Address List](#)

[Use Information in the Notepad](#)

[Track Events in the Yearly Planner](#)

[Keep Track of Anniversaries](#)

[Customize Sections in the Organizer](#)

[Cross-Reference Information in the Organizer](#)

[Integrate the Organizer with Other Applications](#)

[Print from the Organizer](#)

[Use Organizer Utilities](#)

## **Options Commands**

Customizes the sections in your notebook, the save and display options, and modem settings. When you add, remove, or rename sections using Options/Customize, the Options menu reflects these changes.

### Customize

Add, rename, delete, or reorder sections in your notebook. You can also change the section-divider colors.

### Display

Changes section-tab settings and the color of the notebook cover.

### Preferences

Controls how often the Organizer saves your work and specifies several display settings.

### Autodialer

Specifies modem settings.

### Calendar

Specifies settings for the Calendar section.

### To Do

Specifies settings for the To Do section.

### Address

Specifies settings for the Address section.

### Notepad

Specifies settings for the Notepad section.

### Planner

Specifies settings for the Planner section.

### **Anniversary**

Specifies the color of your anniversaries.

## Options Customize

Changes the sections in your notebook. Make your selections from the Customize dialog box.

### **Sections**

Specifies which section you want to customize.

### **Up/Down**

Moves the position of the selected section relative to the other sections.

### Add

Adds a new section based on one of the standard sections (Calendar, To Do, Address, Notepad, Planner, Anniversary).

### **Rename**

Changes the name of the selected section.

### Remove

Deletes the selected section and all the information in it. If you remove an included section, the section in the source file is unchanged.

### Include

Selects a section from another Organizer file for inclusion into the current file. You can view included sections, but you cannot edit them.

## **Options Display**

Changes the settings for the section tabs and the color of the notebook cover. Make your selections from the Display dialog box.

### **Section tabs**

Controls settings for the section tabs.

#### **Size to name**

Makes the section tab the same size as its name.

#### **Overlap by**

Overlaps the section tabs by the percentage you specify.

#### **Width**

Specifies the width of the section tab.

### **Book-cover color**

Specifies the color for the notebook binder.

See also:

[Customizing Section Tabs](#)

## Options Preferences

Controls how often the Organizer saves your work, and specifies several display settings. Make your selections from the Preferences dialog box.

### Save

Specifies how often you want the Organizer to save your work.

#### **After each change**

Saves every time you make any changes to your file.

#### **Every *n* minutes**

Saves after the number of minutes you specify. If you select "Confirm save," you are prompted to confirm each save.

#### **Only when told**

Saves only when you choose File/Save.

#### **Create backup**

Creates a backup of your file every time it is saved.

### Display

Controls several display settings.

#### **Clock & today's date**

Displays the clock and today's date below the Toolbox.

#### **Animated page turn**

Simulates pages turning on screen.

#### **Monochrome**

Formats the on-screen display for a monochrome system.

#### **Gray dialog boxes**

Displays dialog boxes with a gray background.

See also:

[Setting Up Your Organizer File](#)

[Starting and Stopping the Organizer](#)

## Options Autodialer

Specifies the settings that control your modem. The default settings are compatible with Hayes modems. If you do not have a Hayes-compatible modem, you might need to change the settings in the Autodialer Options dialog box.

### Port

Selects the communications port to which your modem is attached. The default is COM1.

### Baud

Selects the speed for the modem. The default is 2400 baud.

### Modem commands

#### Dial Prefix/Suffix

Specifies the command string sent to the modem before (**Prefix**) and after (**Suffix**) you dial. The default prefix command string is ATDT. The default suffix command string is ; (semicolon).

#### Hang-up Prefix/Suffix

Specifies the command string sent to the modem before (**Prefix**) and after (**Suffix**) you hang up. The default prefix command string is +++ . The default suffix command string is ATH0.

### Dial type

Selects whether your modem line is tone- or pulse-compatible. (Most phones use tone dialing.)

### Access code

Specifies the command string placed before all phone numbers to access a particular area code or phone-company system. The code is placed after any prefix you specify in the [Dial dialog box](#) and before the phone number itself.

### Don't dial

Specifies the characters to omit when dialing. Use this option to strip an area code or international dialing code from the beginning of a phone number. Prefixes and access codes are still placed before the phone number.

See also:

[Making Phone Calls](#)

[Using the Phone Log](#)



## Options Calendar

Sets options for the Calendar section. Make your selections from the Calendar Options dialog box.

### Work day

The work day TimeTracker establishes the start and end times of your normal working day, to the nearest hour. It controls which time slots appear when you click on a Calendar page.

### Appointments and meetings

#### Time slots

Specifies the length (in minutes) of each time slot.

#### Default duration

Specifies the default length of an appointment (or meeting). You can override this duration with the TimeTracker when you create individual appointments.

#### Show lines

Specifies how many lines of appointment text are displayed in the Calendar. You can see all the appointment text by clicking it.


#### Show icons/end time

Displays the appropriate appointment icons and the end time of an appointment next to the appointment text.

#### Include weekends

Allows repeating appointments to fall on weekends. You can override this setting in the New Appointment or Repeating Appointment dialog box.

### Cost-code names

Specifies the names you want to use as labels for cost-code information. To use cost-code information when you create or edit an appointment in the Calendar, select . Use **&** in the name to denote the next character as a keyboard accelerator. For example, if you enter **&Rate**, ALT+R selects this field.

### Show

Selects the section that has information you want to display in the Calendar.

### View

Selects the Calendar view you want to display: day per page, work week, full week, or full week per page.

See also:

[Customizing Your Calendar Section](#)

[Setting Cost Codes for an Appointment](#)

[Setting Duration Using the TimeTracker](#)

## **Options To Do**

Controls the display of tasks on your To Do list. Make your selections from the To Do Options dialog box.

### **Show completed tasks**

Displays all completed tasks after any tasks that are still to be completed. Completed tasks appear with a line through them.

### **Show start date**

Displays the start date of a task in front of its description.

### **Show due date**

Displays the due date of a task in front of its description.

### **Show priority**

#### **As indent**

Displays priority 2 tasks with one indent and priority 3 tasks with two indents.

#### **As 1,2,3**

Assigns priority numbers to tasks. 1 indicates a high-priority task, and 3 a low-priority task.

See also:

[Maintaining a To Do List](#)

## **Options Address**

Controls the display of the Address section. Make your selections from the Address Options dialog box.

### Sort by

Selects the field (company, zip code, last name, or type) by which you want to sort in the Address section. When you display the Address template to enter information, you can click on the icons below the Toolbox to change the sort field.

### View

Selects the Address view you want to display: all information, name and address, contact, or phone. When you display addresses, you can click the view icon below the Toolbox to select a view.

### **Continuous**

Displays addresses one after another. If **Continuous** is not selected, an address that begins with a new letter appears at the top of a right-hand page.

### **Turn after Insert/Update**

Automatically turns to the address you just inserted or edited.

See also:

[Entering and Deleting Names and Addresses](#)

## **Options Notepad**

Controls the display of the Notepad. Make your selections from the Notepad Options dialog box.

### **Table of contents**

#### **Show contents**

Displays a table of contents at the beginning of the Notepad section. The table of contents lists both chapters and page titles with page numbers. The Organizer automatically updates the table of contents as you insert or delete pages. You can turn to a page by clicking it in the table of contents.

#### **Short contents**

Condenses the table of contents so that only each chapter number and first-page title appear. You can turn to a page by clicking its title.

See also:

[Modifying the Table of Contents](#)

## **Options Planner**

Controls the display of the Planner section. Make your selections from the Planner Options dialog box.

### **Book time in**

Selects a Calendar section where you want your Planner events to appear and book time. This can prevent scheduling conflicts between Planner events and Calendar appointments (or meetings).

### **View Calendar appointments**

Displays all appointments from the Calendar section that you have already booked. The appointments appear as color bars in your Planner.

### **Include weekends**

Lets you create events that include weekends.

### **AM/PM TimeTrackers**

Sets the start and end times for morning and afternoon events. By default, the AM TimeTracker is set for 8:00 AM to 12:00 PM. The PM TimeTracker is set for 12:00 PM to 6:00 PM.

See also:

[Using Your Planner and Calendar Together](#)

[Customizing Your Planner](#)

## Page Commands

Use the Page commands to turn pages and to unfold or fold pages.

**Prior Page** (PGUP)

Turns back one page in the current section. Turns to the previous section if the current section is open to the first page.

**Next Page** (PGDN)

Turns forward one page in the current section. Turns to the next section if the current section is open to the last page.

**First Page**  (HOME)

Turns to the first page of the current section.

**Last Page**  (END)

Turns to the last page of the current section.

**Fold Out Left** (ALT+←)

Unfolds a left-hand folded page.

**Fold Out Right** (ALT+→)

Unfolds a right-hand folded page.

**Fold In** (ALT+↓)

Folds a page.

## **Section Commands**

Turns to any section in the Organizer file. If you add, remove, or rename sections using [Options/Customize](#), the Section menu reflects these changes.

**Prior Section** (CTRL+PGUP)

Turns to the section before the currently opened one.

**Next Section** (CTRL+PGDN)

Turns to the section after the currently opened one.

**Front Cover** (CTRL+HOME)

Turns to the front cover of the Organizer notebook.

**Back Cover** (CTRL+END)

Turns to the back cover of the Organizer notebook.

### **Calendar**

Turns to the Calendar section. "Calendar" turns to a yearly calendar, "Today" turns to today's date, or a particular month name turns to the first day of that month.

### **To Do**

Turns to the To Do section.

### **Address**

Turns to the Address section. "?" turns to the Address template, a particular letter turns to the first address sorted by the field you specify for Options/Address (for example, Last Name), and "!" turns to any addresses with empty sort fields or numbers in the sort field.

### **Notepad**

Turns to the Notepad section.

### **Planner**

Turns to the Planner section.

### **Anniversary**

Turns to the Anniversary section.

See also:

[Working with Multiple Sections](#)



## **User Guide**

[Creating Appointments and Scheduling Meetings](#)

[Maintaining a To Do List](#)

[Managing a Name and Address List](#)

[Using Information in the Notepad](#)

[Tracking Events in the Yearly Planner](#)

[Keeping Track of Anniversaries](#)

[Customizing Sections in the Organizer](#)

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[Integrating the Organizer with other Applications](#)

[Printing from the Organizer](#)

[Using Organizer Utilities](#)



## **Using Shortcuts in the Organizer**

Keyboard Shortcuts


Mouse Shortcuts



## Control Menu

The Control menu lets you restore, move, size, minimize, maximize, or close the active window; switch between windows; and run another program.

### To run an application

1. Click  in the upper left corner of the screen to display the Control menu.  
The Organizer displays the Run Program dialog box.
2. Choose **Run**.
3. Select an application from the list, specify the path and name of an application in the edit box, or choose **Browse** to select an application.

#### **Calculator**

Runs the Windows Calculator.

#### **Clipboard**

Runs the Windows Clipboard Viewer so you can view, retrieve, or delete the contents of the Clipboard.

#### **Control Panel**

Runs the Windows Control Panel so you can change the Windows operating system configuration. For example, you can set the system date and time or change the date and time formats using commands on the Control Panel.

#### **Organizer Utilities**

Runs the Organizer Utilities program so you can compact your Organizer files and verify their integrity.

#### **Print Manager**

Runs the Windows Print Manager so you can install and configure printers, connect to network printers, and control the printing of your files.

## Tools Commands

Hand  (CTRL+H)

Selects the Hand tool, which is used to select, drag, and drop entries.

Magnet  (CTRL+M)

Selects the Magnet tool, which is used to pick up and move entries such as an appointment or a Notepad page.

Anchor  (CTRL+A)

Selects the Anchor tool, which is used to cross-reference or link information.

Axe 


Selects the Axe tool, which is used to break links between information.

Insert


Creates a new entry for the current section. Displays the dialog box that is appropriate to the section that is open.

**Back** 

Turns back through pages you have viewed during the current session.

Phone Log 

Displays a list of phone calls that you made.

Phone Call 

Autodials a phone number using a Hayes-compatible or autodial modem.

SmartIcons

Positions the icon palette; hides/displays the icon palette; and adds, removes, and rearranges icons on the palette.

See also:

[Rescheduling an Appointment or Meeting](#)

[Copying and Moving a Notepad Page](#)

[Linking Information in the Organizer](#)

[Making Phone Calls](#)

[Using the Phone Log](#)

## **Tools Insert**

Inserts a new entry for the current section.

**Insert Appointment** 

**Insert Task** 

**Insert Address** 

**Insert Page** 

**Insert Event** 

**Insert Anniversary** 



## **Tools Phone Log**

Displays the list of phone calls you have made. You can choose to list all calls or only unanswered calls. Make your selections from the Phone Log dialog box.

### **Calls made on**

Specifies the date for which you want to see a log of phone calls.

### **List**

Selects which calls to display. "All calls" lists every call. "Unanswered" lists only calls that were not answered.

### **Notes**

Displays and allows you to edit any notes that you took during the selected call.

### **Dial**

Dials the phone number of the selected phone-log entry.

### **Remove**

Deletes an entry from the log.

### **Update**

Updates any notes you add or edit related to the call.

See also:

[Using the Phone Log](#)



## Tools Phone Call

Dials a phone number using a Hayes-compatible or autodial modem. (Options/Autodialer controls the modem settings.) Make your selections from the Dial dialog box.

### **Number**

Specifies the number that you want to dial. To automatically display a number, you can drag and drop an address on the Phone icon in the Toolbox. (Click the down arrow for **Number** in the Dial dialog box to display other numbers listed for that address.) In the Dial dialog box, you can type a number, select an entry from the **Quick dial** list, or click the numbers in the number pad.

#### **Use prefix**

Specifies the characters to be dialed before the phone number. "9," is the default.

#### **Use access code**

Selects whether to use the access code if one is specified using Options/Autodialer.

### **Quick dial**

Lists your most frequently dialed numbers.

#### **New**

Adds a new phone number to the **Quick dial** list.

#### **Edit**

Edits a phone number on the **Quick dial** list.

### **Dial**

Dials the number specified for **Number**, then displays the Dialing dialog box.

### **Incoming**

Displays the Call Log dialog box in which you can record notes about a call you receive. The call will be added to the phone log when you choose **Hang Up**.

### **Recall**

Causes the modem to hang up for 75 milliseconds, then reconnect.

See also:

[Making Phone Calls](#)

## **Tools SmartIcons**

Positions the icon palette; hides/displays the icon palette; adds, removes, and rearranges icons. SmartIcons provide single-click access to common Organizer functions. Make your selections from the Tools SmartIcons dialog box.

**Note** You need a mouse to use the SmartIcons.

### **Palette position**

Specifies where on your screen you want to position the icon palette: on the left, on the right, at the top, or at the bottom of the Organizer window. You can also select "Floating," then use the mouse to move or resize the palette to suit your needs.

### **Hide palette**

Turns off the display of SmartIcons.

### **Customize**

Lets you add, remove, and rearrange icons. The Organizer displays the Customize SmartIcons dialog box. To add or remove icons from the current palette, drag them on or off the palette.

#### **Standard icons**

Displays all available SmartIcons.

#### **Current palette**

Shows the icons currently on your icon palette.

#### **Description**

Displays a description of an icon when you click on it.

See also:

[Using SmartIcons](#)



## **Commands Index**

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