

# ORGANIZER 2

## PIM

**VERDICT** Personal organiser and network scheduler that's great for end users, but a bit of a nightmare for administrators who aren't completely sold on Lotus products. Shame about the bugs, too.

**PRICE** £84 (£99 inc VAT); £49 upgrade.

**SUPPLIER** Lotus 01784 455445

**AVAILABILITY** Now (but look out for bug-fix releases).

**SYSTEM REQUIREMENTS** Standalone: Windows 3.1, 386 PC or higher, 8Mb of RAM, 8Mb disk space. Network: supports NetWare, LAN Manager or 100 per cent MS Net. Scheduling functions require cc:Mail 2 or higher or Notes 3.1 or higher.

Lotus Organizer has always been an idiosyncratic product. It looks and feels like no other personal information manager (PIM), mimicking as accurately as possible a paper-based diary.

Small design touches have won the hearts of many people; for example, the quick and easy way the times for appointments can be set up using a simple sliding scale, the little

stopwatch which replaces the traditional Windows hourglass, or the way deleted data entries burst into flames when they're dragged to the wastebasket icon.

The ability to customise the Organizer environment has made it very attractive to non-technical users. In particular, it allows them to decorate their diaries with bitmap pictures, use various colours for marking sections or individual items and generally to stuff the application with all kinds of personal bits and pieces that's helped to overcome many a first time user's technophobia.

However, Organizer's somewhat individual appeal has made it a difficult product to integrate into the corporate environment. The all-important network scheduling functions, which transform a jazzy PIM into an effective productivity tool for the work-group, have taken a long time to reach maturity. And it's only in this latest release that Lotus has managed to totally reorganise Organizer to work in an integrated way with the rest of the Lotus product portfolio.

As soon as you start to install Organizer 2 you realise that it's become a much more complex application. The full program plus

• **Grabber.** As well as the usual pointer button, there's now a grabber for moving data entries from one place to another.

• **Scheduling a meeting.** Pressing the handshaking icon allows you to schedule meetings across the network. You do need cc:Mail or Notes in place, though, to provide the basic transport mechanism.

• **On-the-fly views.** These four buttons provide a quick way of viewing your calendar information in different ways. There are similar buttons for all sections of Organizer 2.

• **Spot the bug.** This oddly-shaped icon shouldn't be here. It's just one of many bugs that PC Pro discovered in the review copy of Organizer 2.

sample reports and paper layouts takes up a hefty 8Mb of disk space, with a further 4Mb required by the agent software (of which more later).

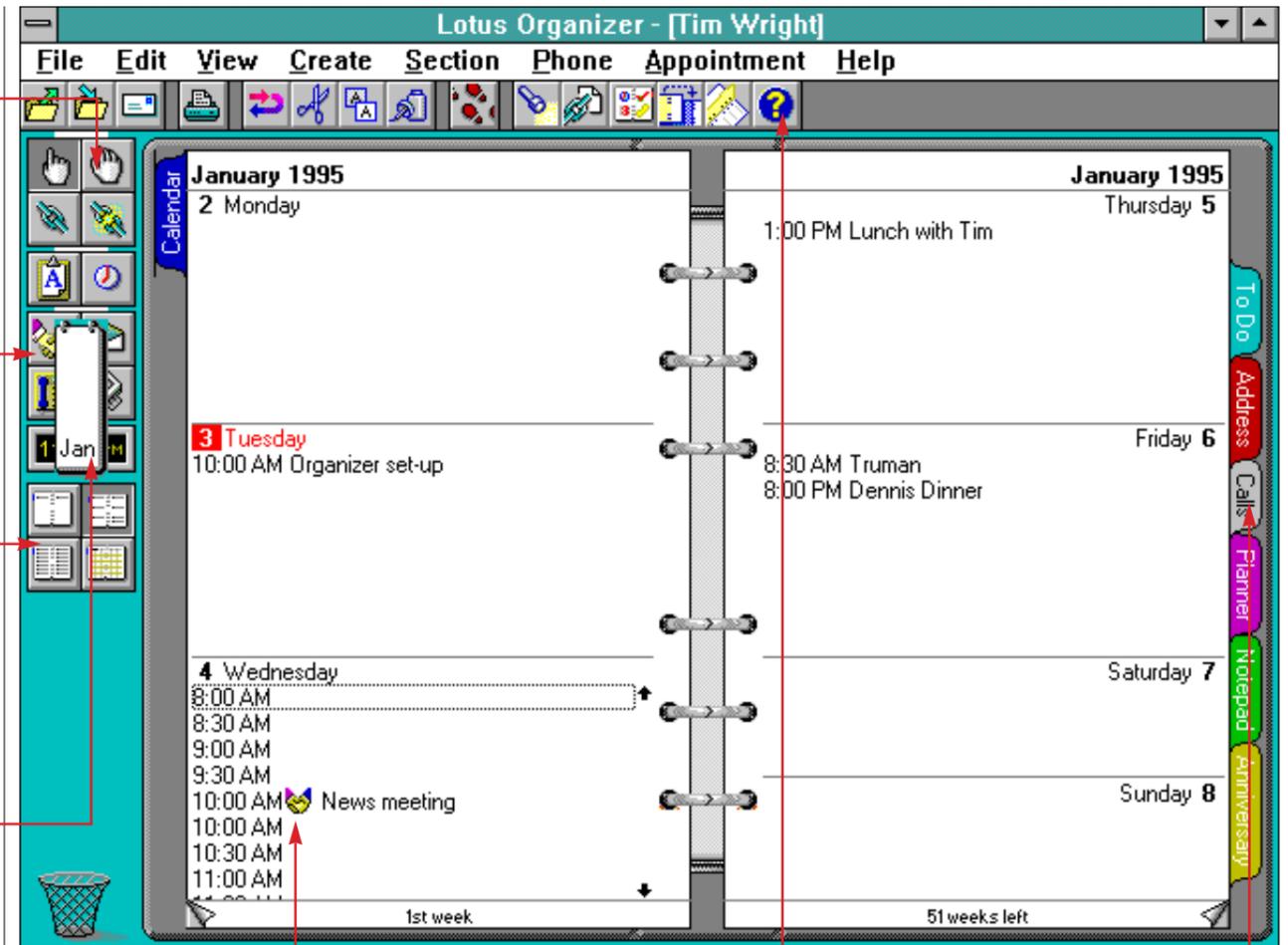
I should confess that I was working with a finished US version of Organizer, so I didn't have the luxury of the setup manuals – and boy, do you need them.

### Admin hassles

This isn't a program where you just pop in the disks and follow the instructions. Assuming you're already the mail administrator, you'll at least have got some of the hassle of setting up user accounts out of the way. Nevertheless, there are still a number of issues to be resolved about identifying the status of each Organizer user (access rights, path, mappings, and so on) and resources such as meeting rooms, cars and presentation tools.

There's now a Windows-based administration module which makes life easier. But I still had to waste several hours fiddling about with INI files and path statements to make sure that all the users could find their OR2 files, that Organizer could actually use the VIM transport layer and that the scheduling agent could hook into cc:Mail.

To make matters worse, Organizer doesn't have just one INI file, it has several: ORG2.INI at the desktop, LOTUS.INI for any other Lotus desktop apps, the default NETORG2.INI at the server and one for the agent just for good



• **Categories.** Another useful new feature is the ability to sort entries into various user-defined categories.

• **Smarticon support.** As you'd expect from a Lotus product, there's full support for creating customised Smarticon palettes.

• **Calls.** For using Organizer as a contact manager, for logging calls, timing them, assigning a cost code, associating the cost to specific clients and linking information gathered during a call to other sections.

## Second Opinion

Jon Honeyball takes a critical look at Organizer 2's connectivity

A standalone user of Organizer 1 will probably be quite pleased with Organizer 2. That is, when the bugs are ironed out. Lotus made the decision to release Organizer 2 for free download from Ziffnet on CompuServe, which was useful. What was stupid was releasing it a week or so before Christmas, so when the inevitable bugs emerged, the technical support staff were sitting down to their turkey. Organizer 2 is an improvement over Organizer 1, yet it's disappointing. It's not what it is that's disappointing, it's what it isn't.

There's still no credible way of getting into the Organizer database engine from external programs, which makes it a closed book as far as integrated desktop systems are concerned. This is a crucially stupid error on Lotus' part, because it means you can't put data into an Organizer file and then retrieve it using a different tool. Worse still, you can't seamlessly sit the Organizer book concept on top of external data, with it acting as a universal client to outside data. A grid on each page that could be linked to an external ODBC data source would allow Organizer to be the ultimate desktop information resource, with pages of data coming in from external data engines.

To go to the heart of the problem, there's no ODBC driver nor OLE Automation, and this simply isn't good enough for a group scheduling application designed to sit on users' desktops in companies. There is work underway to specify the type of accessing that will be possible, but this should have been done months ago for simultaneous release with Organizer 2.

On a deeper level, Lotus has failed to deliver to market any innovative use of the book technology found first in Organizer. It's a quite brilliant way of organizing (sic!) data and presenting it. Microsoft hasn't been slow to realise the potential for sorting and collating user options with tabs – just look at tools/options in Word 6. Lotus has had, since day one, a stunningly effective way of letting users sort their data using the Organizer book system, and the lack of connectivity to the underlying database means it has totally frittered away its lead.

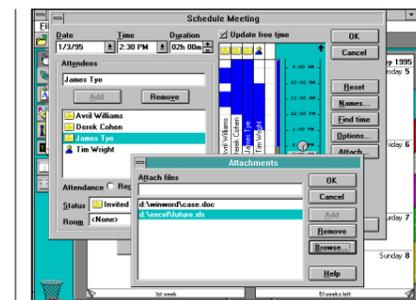
Until I see something akin to open data connectivity in Organizer 2, something that doesn't rely on Lotus Notes as a network transport, and a serious effort by Lotus to exploit the technology it has, I'll have to call this release Organizer 1.5. It deserves to be so much better.

measure. All of these need to be in sync for the system to work effectively. Never was there a better case made for Windows management utilities such as Saber Lan Workstation or Intel LanDesk Manager.

If you manage to wade through all these administrative hassles (and remember, I was just using a basic workgroup-size network with a single server), the troubles don't stop there. Organizer is also a big user of DLLs (dynamic link libraries), and consequently plonks quite a few system files into the Windows directory.

Not only could this make Windows upgrades a big pain, sorting through which files need to stay where they are, there's also the danger that the Lotus-supplied DLLs will overwrite existing DLLs with disastrous effects for other applications. For example, one Cix user in the PC Pro offices wasn't amused to find that her Ameal reader had been stuffed by Organizer 2.

Bugs, too, abound in the pre-release version we reviewed (this was code complete though, and by no means a beta). The application jammed during the conversion of an



You can send files as attachments with your message, so people can look at relevant documents without resorting to the mail system.

Organizer 1.1 file, and again while printing and archiving.

On the screen of one workstation an oddly-shaped diary icon appeared that definitely shouldn't have been there, covering some of the main command buttons. The technical support man at Lotus UK suggested this may have had something to do with the use of the Windows VGA 256-colour driver; a bug relating to this has already been reported by many beta customers in the US.

The real shame in all this is that the application, when it works, remains as much fun to use as ever. And some of the end-user features that have been added in the latest release are genuinely useful.

For example, in the calendar section the simple addition of a one month view has immediately made the product more useful to me for planning my work. You can also now set repeat to-do tasks with customisable intervals (for example, the second Thursday of every month).

In the address book, you can display home and business addresses for a person simultaneously. No longer do I need to have separate ORG files for personal stuff and business.

Another goody is a new categorising feature, so you can label any entry anywhere. Lotus provides a range of iconed labels such as 'personal', 'ideas', 'issues' and 'vacation'. Naturally, you can add your own categories and icons, and then simply mark items as appropriate.

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A completely new Calls section has been added with a view to using Organizer as a contact manager, so you can time calls, cost code them, assign the cost to particular clients and integrate information gathered from phone calls into other sections of the Organizer.

The Anniversaries section is another neat touch, with a sort function that even allows you to display entries by zodiac sign. The traditionally excellent print support functions have been expanded yet again to support more paper styles.

Generally, Lotus has worked hard to make the product extremely flexible so that it will appeal to all sorts. You can sort your Organizer data in almost any way you want now – by time, place, person, category. There are even a few extra buttons added across the sections for creating on-the-fly views, which are useful if you need to take down or give out information over the phone quickly. This feature is compromised slightly by the general sluggishness of the program, even on a machine with 8Mb of RAM; the Lotus fly is definitely a much sleeker animal than the one I'm used to.



**Meetings can be tentative, optional or compulsory. Resources such as a room and presentation tools can be booked automatically by the scheduling agent.**

### Together at last

Probably the best news in Organizer 2 is that it now allows simultaneous access to a single file, so that secretaries can be booking appointments for bosses, even while the boss is inputting new data. This makes the whole idea of proxy users and shared access much more transparent and inviting. Thankfully, there's also a User Access List function for granting various access rights to different users, so you can be sure nobody is mucking about with your schedule without your permission.

Another obvious improvement is the ability to attach files to meeting notices, so that important documents can be distributed and read without having to fire up cc:Mail.

Again, flexibility is the watchword. For example, as well as being able to check out free time spaces in other users' calendars and view them as a bar chart, you can now set up conflicting and overlapping appointments. You can also specify whether attendance is optional or mandatory, or even simply pencil in the meeting with a view to confirming it at a later date. All of this can be done within the application itself, rather than having to wait for the mail system to boot up.

On a single server system, all of this can be done without worrying about the scheduling agent software that I mentioned earlier. Essentially, the role of the agent is to work with cc:Mail to deliver meeting notices and automatically book any resources needed. On a single server, you don't need an agent, because every user will have a view of all the users and resources, but on multiple server sites, the agent is required to route meeting information to the right people.

Each agent, in fact, works via a specific email account. Thus, when you schedule a meeting, a message is sent to the agent email

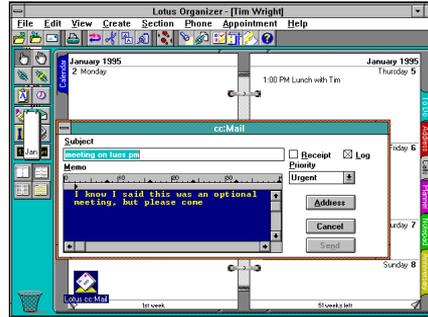
account, from where it's picked up and processed by the agent.

Obviously, the agent needs to be running constantly in the background in order to carry out the routing. Since the Organizer program itself already takes up a fair amount of resources on a workstation, it's likely that on a large site the agent will need a dedicated PC.

Another caveat is that you shouldn't be tempted to give your agent a proper name like Bill or Sue. Confine yourself to boring ones like \_agent1 or \_schedule7, otherwise you may find people sending mail messages to your agent as if it were a real person.

### Time trials

It's little things like this that make Organizer 2 a lot of hassle for an application that really shouldn't take up too much of an administrator's time. Bugs aside (Lotus intends to ship a bug-fixed version), there's an overall impression about Organizer that what used to be a fun Windows product for relatively small workgroups, has been fixed and fiddled with to appeal more strongly to traditional Lotus customers in the corporate market. The problem is that you can still see the joins, and no amount of SmartIcons will



**At last Lotus has provided a Windows-based administration tool. This works in tandem with the mail directory services.**

help (support for SmartIcon customisation is another obvious enhancement in version 2).

To a large extent, you do have to be an out-and-out Lotus fan to get the real benefit of Organizer and justify the £99 price tag. This was already true in version 1.1, to the extent that network scheduling functions relied on the presence of cc:Mail as the basic transport mechanism. In version 2 there's now the option of using Notes Mail instead. In short, if you don't have cc:Mail or Notes, don't bother with Organizer 2.

Even if you do already work with cc:Mail or Notes, they have to be fairly recent

releases to work with Organizer – cc:Mail 2 or higher, Notes 3.1 or higher. I assume too that since the product seems to rely on the presence of cc:Mail DLLs, it's the Windows version of cc:Mail that's preferred. So you could end up in a rather nasty upgrade spiral when you plump for Organizer – which was no doubt the Lotus plan all along, and in keeping with the company's rather cynical tactic of recent years to use customer enthusiasm for desktop products like 1-2-3 and Ami Pro to create a market for Notes.

Organizer 2 will also come as part of SmartSuite 3 ('the first Notes-ready desktop suite' boasts Lotus), due out soon. And no doubt the cheapest way of getting hold of the product will be as part of some suite upgrade deal. Waiting for this iteration could be a smart move anyway. Perhaps by then all of the bugs and at least some of the admin hassle will have been sorted out.

*Tim Wright*

<b>pc PRO</b>	<b>FEATURES</b>	☆☆☆☆
	<b>EASE OF USE (USER)</b>	☆☆☆☆
	<b>EASE OF USE (ADMIN)</b>	☆☆☆☆
	<b>VALUE FOR MONEY</b>	☆☆☆☆
	<b>OVERALL</b>	☆☆☆☆

