ADMINISTRATOR'S GUIDE

Lotus ORGANIZER RELEASE 2.1

The Personal and Group Scheduling Standard

Contents

Chapter 1
Before You Begin

Lotus Organizer® Release 2.1 *Administrator's Guide* is for administrators who need to plan, install, and set up Organizer™ for Windows®, and maintain Organizer files on a network.

Organizer provides both shared calendaring and scheduling. **Shared calendaring** lets multiple users view and edit information in one file at the same time. **Group scheduling** lets users schedule meetings with others in their workgroup or company by viewing busy and free times, sending meeting invitations, and letting users respond to meeting invitations across a network.

There are several ways to configure Organizer to run on a network.

- **Mail-based scheduling** uses an existing e-mail network and the Lotus Notes® or cc:Mail™ mail transport system to deliver meeting notices. A scheduling agent processes meeting notices that arrive in an Organizer message mailbox. Mail-based scheduling provides enterprise-wide calendaring and scheduling.
- **Single-server scheduling** uses a common message file that contains a separate table of meeting notices for each user. With single-server scheduling, all users share this message file and there is no scheduling agent. Typically, single-server scheduling is for small workgroups who share Organizer files on one file server without Notes™ or cc:Mail.
- **Shared calendaring**, without group scheduling, lets users run Organizer from the network and store their Organizer files in a shared directory.

Before you install and set up Organizer, and maintain Organizer files on a network, you need to

- Understand your network operating system and its terminology.
- Get your network up and running.

If you use Organizer with mail-based scheduling, you also need to

- Understand Notes or cc:Mail systems terminology.
- Install and set up your Notes server and Notes mail, or your cc:Mail post office.

If you're unfamiliar with this information, refer to Lotus Notes *Administrator's Guide*, *Lotus cc:Mail Administrative Utilities Administrator's Manual*, or your network operating system documentation.

System requirements

The following sections include hardware and software requirements for the Notes server, the file server on which the cc:Mail post office resides, the Lotus Organizer Administration 2.1 program, and Lotus Organizer Scheduling Agent 2.1. See "Components of a mail-based Organizer installation," in Chapter 2, for descriptions of the components.

Notes server

The following table describes the hardware and software requirements for the Windows and OS/2® versions of the Notes server. You need to fulfill these requirements to run Lotus Organizer Scheduling Agent 2.1 as an add-in server task for Notes.

Notes server specifications	*Windows*	*OS/2*
Notes software	Release 3.1 or later	Release 3.1 or later
Operating environment	Windows 3.1 or later (real mode is not supported); Microsoft® DOS (MS-DOS®) 5.0 or later	OS/2 2.1 or later
CPU	80386 minimum, IBM® PC or compatible (486 recommended)	80386 minimum, IBM PC or compatible (486 recommended)
File storage	High-capacity hard disk, 80MB minimum (120MB recommended); or access to a network file server	High-capacity hard disk, 80MB minimum (120MB recommended); or access to a network file server
RAM	6MB minimum (12MB recommended)	8MB minimum (12MB recommended)

Note If you run your Notes UNIX® servers (for example, on AIX®, HP-UX™, Solaris®, or Windows NT™), you can configure the Windows and/or OS/2 scheduling agent on a separate Windows or OS/2 PC and use it as the scheduling-agent task for these platforms. You can run the Windows scheduling agent on a Notes Windows NT server. You *cannot* run the scheduling agent for Windows or OS/2 as an add-in server task on a Notes UNIX server.

File server for cc:Mail post office

File server specifications	*Requirement*
cc:Mail ADMIN software	Version 3.21 or later
Operating environment	Network operating system that supports MS-DOS 5.0 or later, and record locking (for example, AppleTalk® Filing Protocol (AFP), or Network File System (NFS))
CPU	80386, IBM PC or compatible
File storage	High-capacity hard disk with 3MB per user for mail, and 3MB per user for temporary files for administrative utilities
RAM	Whatever is recommended to support the network operating system

Note If you have file servers for cc:Mail post offices on platforms other than Windows or OS/2 (for example, on a UNIX server with NFS or an AppleShare® server with AFP), you can configure the scheduling agent for Windows or OS/2 on a separate Windows or OS/2 PC and use it as the scheduling-agent task for these platforms.

Lotus Organizer Administration 2.1

Lotus Organizer Administration 2.1 specifications	*Requirement*
Operating environment	Windows 3.1 or later; MS-DOS 5.0 or later
CPU	80386 minimum, IBM PC or compatible (486 recommended)
File storage	High-capacity hard disk, 80MB minimum (120MB recommended); or access to network file server
RAM	6MB minimum (12MB recommended)
Other	Mouse (optional)

Lotus Organizer Scheduling Agent 2.1

Organizer 2.1 scheduling agents for OS/2 are 32-bit applications.

Scheduling agent specifications	*Windows*	*OS/2*
Operating environment	Windows 3.1 or later (real mode is not supported); MS-DOS 5.0 or later	OS/2 2.1 or later

Continued

Scheduling agent specifications	*Windows*	*OS/2*
CPU	80386 minimum, IBM PC or compatible (486 recommended)	80386 minimum, IBM PC or compatible (486 recommended)
File storage	High-capacity hard disk, 80MB minimum (120MB recommended); or access to a network file server	High-capacity hard disk, 80MB minimum (120MB recommended); or access to a network file server
RAM	6MB minimum (12MB recommended)	12MB minimum (16MB recommended)
VIM DLL files	Version 2.07 or later	Version 2.06 or later

Supported networks and access rights

As the administrator, you need full access rights to the file server directories to perform the procedures in this book. For more information about how to assign access rights to file server directories, see your network operating system documentation. The following table lists the full access rights for each supported network operating system:

Network	*Full access rights*
Novell® NetWare® 386 version 3.11 or later	Access Control (A), Create (C), Erase (E), File Scan (F), Modify (M), Read (R), Supervisory (S), and Write (W)
Microsoft LAN Manager version 2.2 or later	Read (R), Write (W), Create (C), Delete (D), Change Attributes (A), Change Permissions (P), and Execute (X)
Microsoft-compatible (MS-Net) networks:	
Banyan® VINES® version 5.0	Control (C)
IBM LAN Server version 3.0	Attributes (A), Create (C), Delete (D), Execute (X), Permissions (P), Read (R), and Write (W)
DEC™ PATHWORKS™ version 4.1	Read (R), Write (W), and Create (C)
DEC PATHWORKS version 5.0	Read (R), Write (W), and Create (C)
Artisoft LanTastic® version 6.0, 5.0	Read (R), Write (W), Create (C), Delete (D), Make Directory (M), File Lookups (L), Delete Sub-directories (K), Execute Program (E)

Note Windows for Workgroups version 3.11 can be used as a peer-to-peer network in conjunction with one of the supported networks, provided that Organizer has been configured for group scheduling with the supported network.

Chapter 2
Planning Your Organizer Installation

This chapter describes Organizer concepts that are important for planning your mail-based Organizer installation. It provides essential conceptual information with illustrations. See Chapter 5 for information on single-server scheduling. See the NDEPLOY.WRI and CDEPLOY.WRI files (in the Organizer \ADMIN directory) for information on deployment issues for group scheduling with Lotus Notes and cc:Mail.

An overview of Organizer

Organizer Release 2.1 contains mail-based scheduling for Notes, in addition to mail-based scheduling for cc:Mail, introduced in Organizer Release 1.1. Organizer Release 2.1 also includes major enhancements to the group scheduling and Personal Information Manager (PIM) features of Organizer Release 1.1. See Chapter 2 in *Exploring Organizer* for more information on new features.

Organizer Release 2.1 relies on the existing Notes or cc:Mail directory and e-mail transport to deliver meeting notices across the network from one user to another. Organizer users must have a Notes mail or cc:Mail account to send and receive meeting notices. Organizer users can select meeting attendees from various Notes Name & Address Books or the cc:Mail directory. Each Organizer user who is invited to a meeting receives the invitation in his or her Organizer file.

In addition, Organizer Release 2.1 lets Notes mail users schedule meetings with cc:Mail users and vice versa. For more information, see “Scheduling meetings between Notes and cc:Mail users,” later in this chapter.

Users of other mail systems who are connected by a Notes or cc:Mail gateway or the cc:Mail Router can still get invited to meetings. (They receive meeting notices by e-mail in their inboxes.)

What is mail-based scheduling?

Mail-based scheduling relies on the existing Notes or cc:Mail directory and e-mail transport to deliver meeting notices. A scheduling agent processes meeting notices that arrive in its mailbox. Any user on the e-mail network can schedule meetings with any other user on the e-mail network, regardless of location.

Meeting notices travel on the e-mail network across the Local Area Network (LAN) or Wide Area Network (WAN) through routers, bridges, or links to any other e-mail system. Organizer users who are invited to a meeting receive the meeting invitation within their Organizer files. Meeting invitations for non-Organizer users arrive in their Notes mail databases or cc:Mail inboxes.

Mail-based scheduling provides the following benefits:

- Lets companies use their existing e-mail systems and any previous investment made in Notes (servers, databases, Lotus Mail Exchange Facility (LMEF), gateways) and cc:Mail (routers, Import/Export, Automatic Directory Exchange (ADE), LMEF).
- Lets users choose meeting attendees from the Notes Name & Address Book or cc:Mail directory. In addition, using a single directory facilitates administration of mail-based scheduling on the network.

Components of a mail-based Organizer installation

When you use Organizer for mail-based scheduling, your Organizer installation consists of the following components on a LAN. (Some components are required for using mail-based scheduling with Notes and cc:Mail, while others are for Notes or cc:Mail only.)

- Organizer program files (Notes, cc:Mail)
- Organizer (.OR2) files (Notes, cc:Mail)
- Lotus Organizer Scheduling Agent 2.1 (Notes, cc:Mail)
- Lotus Organizer Administration 2.1 (Notes, cc:Mail)
- Organizer initialization (.INI) files (Notes, cc:Mail)
- Notes Name & Address Book (Notes)
- Notes server (Notes)
- cc:Mail post office (cc:Mail)
- Lotus Mail Exchange Facility Release 3.1 (optional; for use by mixed Notes and cc:Mail sites)

Organizer program files

Users run Organizer on their workstations. As the administrator, you install the Organizer program files on the file server and inform users how to run the Install program. Users can run Organizer from the file server or from their workstations. Running Organizer from the file server saves space on each user's hard disk and lets you, the administrator, control the Organizer program files on the file server.

Organizer (.OR2) files

Each Organizer user, room, and resource has an Organizer file stored on a file server. Storing users' Organizer files on a file server lets users view and find other people's free- and busy-time information when scheduling a meeting. The scheduling agent must also access Organizer files to update the status of meeting notices.

Lotus Organizer Scheduling Agent 2.1

Lotus Organizer Scheduling Agent 2.1 is a Microsoft Windows or OS/2 application. For Notes, you can install the scheduling agent as an add-in task for a Notes Windows or OS/2 server. You can also install the scheduling agent to run on a Windows or OS/2 system that is *not* a Notes server but *is* attached to the network. In this configuration, the scheduling agent is a stand-alone task. For cc:Mail, you can only install the scheduling agent to run on a Windows or OS/2 system as a stand-alone task. The system must be attached to the network.

Note The stand-alone version of the scheduling agent for Notes or cc:Mail doesn't require access to the Notes server or cc:Mail post office. The scheduling agent does, however, need access to its mail database on a Notes server or mailbox in a cc:Mail post office.

The scheduling agent acts as a super-assistant for booking rooms and resources, and directly updates the changing status of scheduled or rescheduled meetings (for example, attendees who have accepted, declined, or delegated meetings). Each scheduling agent manages an assigned set of users, rooms, and resources listed in the public Name & Address Book or in the cc:Mail post office.

Lotus Organizer Administration 2.1

Lotus Organizer Administration 2.1 is a Microsoft Windows application for creating and maintaining Organizer group-scheduling files. Lotus Organizer Administration 2.1 lets you manage the Organizer scheduling information that is stored within the Notes Name & Address Books and the cc:Mail directory. See Chapter 4 for information on using Lotus Organizer Administration 2.1.

Organizer initialization (.INI) files

Organizer stores preference information in two initialization (.INI) files—ORG2.INI and ORG2NET.INI. The Install program creates these files during installation. The ORG2.INI file contains sections and initialization entries for group scheduling, Organizer settings, user setup, Lotus Organizer Administration 2.1, and the scheduling agent. It resides in the ORG2\WIN directory on the file server or in the Windows program directory on a local drive. See "Maintaining the ORG2.INI file," in Chapter 4, for information on changing the initialization entries in this file. ORG2NET.INI is shared among Organizer users and resides in the Organizer program directory on the file server.

Notes Name & Address Book

Notes stores the names of all Notes users in a database called a Name & Address Book. When you use mail-based scheduling with Notes, scheduling information for Organizer is stored in unique Organizer fields in Person documents in the public Name & Address Book. See "Mail-based scheduling examples with Notes," later in this chapter, for details.

Notes users can typically access the following two Name & Address Books:

- The public Name & Address Book that contains the names of all Notes users within a domain
- A personal Name & Address Book that contains the names of people with whom a user frequently exchanges mail

Notes server

Both the Organizer 2.1 client and scheduling agents use the Notes Applications Program Interface (API) to access the Notes server running under Windows or OS/2. Specifically, they use the Notes API to read and write users' names and Organizer information from the Name & Address Book, and send and receive meeting notices.

cc:Mail post office

The cc:Mail post office stores the location of users' Organizer files and the names of their scheduling agents in the Comments field in cc:Mail directory entries. All operations pertaining to directory search and update are performed through Vendor Independent Messaging (VIM) APIs. Organizer uses the Comments field non-intrusively. That is, any information already stored in the Comments field is preserved. See "Mail-based scheduling examples with cc:Mail," later in this chapter, for details.

Note The cc:Mail Comments field is limited to 126 characters.

Lotus Mail Exchange Facility Release 3.1

If your site has both Notes mail users and cc:Mail users, you can use Lotus Mail Exchange Facility (LMEF) Release 3.1 so that these users can schedule meetings and LMEF Directory Exchange can exchange scheduling information between the Notes Name & Address Book and the cc:Mail Directory. See "Scheduling meetings between Notes and cc:Mail users," below, for more information.

Scheduling meetings between Notes and cc:Mail users

If your site has both Notes mail users and cc:Mail users, you can set up your system so that these users can schedule meetings. To do so, you must install and use Lotus Mail Exchange Facility (LMEF) Release 3.1 on the Notes OS/2 server.

If you only plan to use LMEF for scheduling meetings between Notes and cc:Mail users, you can use LMEF on an existing Notes OS/2 server. However, if you intend to use LMEF for scheduling meetings and to exchange mail between Notes and cc:Mail users, you should use a dedicated Notes OS/2 server for LMEF.

LMEF is an OS/2 application that is designed to exchange mail messages and directory information between cc:Mail and Notes. This includes information about users' scheduling agents, files, and servers and how to route mail between the users of each mail system. If these users are using Organizer Release 2.1, you can configure LMEF to exchange Organizer information between Notes and cc:Mail.

For more information about installing and using LMEF, refer to Lotus Mail Exchange Facility Release 3.1 *Administrator's Guide.* For more information about installing and configuring LMEF to exchange Organizer information, refer to "Configuring LMEF Release 3.1 for use with Organizer Release 2.1," in Chapter 3. For more information about obtaining LMEF, contact a Lotus authorized reseller, your local Lotus representative, or Lotus directly at (800) 346-1305.

Understanding how free-time search works

Each Organizer Release 2.1 user, room, and resource has an Organizer file stored on a file server. Storing Organizer files on a file server lets individual Organizer users access these files to enable real-time display of free- and busy-time information to schedule meetings. Free-time search works in

single LAN configurations as well as multiple-LAN and multiple-server configurations as long as the LANs are fully bridged or routed.

Users need the access to another user's .OR2 file to schedule a meeting. By default, each user's Organizer file is set to provide a graphical view of free-time and busy-time information in their Calendar. However, users may still schedule meetings with a user whose free and busy times aren't available.

For example, let's say an Organizer user in New York wants to schedule a meeting with an Organizer user in London. The London user's name appears in the New York user's directory, but the London file server is not accessible from New York and consequently, the New York user wouldn't be able to obtain the London user's free and busy times. However, because a valid scheduling-agent name is assigned to the London user (and the scheduling-agent name also exists in the New York user's directory), meeting notices can be delivered to the London user's .OR2 file.

The following factors contribute to how effectively free-time search works at your site:

- Type of LAN configuration (hub-and-spoke or peer-to-peer)
- Type of file server connection (static or dynamic)
- Relationship between the number of servers and the number of users per file server

Static and dynamic file server connections

A **static connection** to a file server lets users browse through the file server's file systems. Static connections are those created with the MAP command (for NetWare servers) or the NET USE command (for Microsoft LAN Manager servers). A **dynamic connection** is one created by the Organizer client software during free-time search if users cannot browse servers.

For NetWare networks, using dynamic connections for large installations that are spread across multiple servers provides greater flexibility and better security than static connections. Static connections require that the drive names used at users' PCs correspond to the ones specified in the Comments field of their cc:Mail directory entries. (This is impractical for very large networks.)

Dynamic connections require only one additional network account (for example, ORGACCT). Static connections require valid network access rights for each user on each file server storing .OR2 files.

Note For examples that demonstrate dynamic and static connections, see "Mail-based scheduling examples with cc:Mail," later in this chapter.

What does Lotus Organizer Scheduling Agent 2.1 do?

Lotus Organizer Scheduling Agent 2.1 is a Microsoft Windows or OS/2 application that processes meeting notices that arrive in a scheduling-agent's mailbox or mail database.

The basic functions of Lotus Organizer Scheduling Agent 2.1 are to

- Process each meeting notice and deliver it to the user's .OR2 file.
- Keep the status of attendees up-to-date.
- Book resources, independent of scheduling meetings and regardless of their location. For example, a user can book a company car in New York from the San Francisco office. Without a scheduling agent, the user must either send e-mail or call someone to book the car.
- Act as an automated administrative assistant for the calendars of rooms and resources, such as company cars, computers, and audio visual equipment. If there is no scheduling agent, someone must monitor these resources manually.
- Send text-only e-mail messages to non-Organizer users' inboxes to notify them of a meeting.

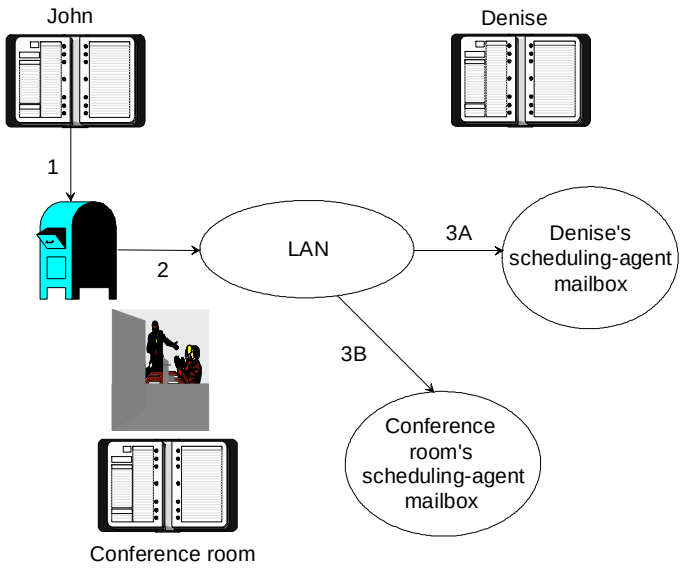
Note The location of the scheduling-agent's mailbox or mail database affects the delivery time of meeting notices and e-mail traffic.

What happens when users schedule meetings?

Organizer lets users choose how they want to process meeting notices, either manually or automatically. With manual processing, the hands in the group scheduling icon shake when the user has received a meeting invitation. With automatic processing, Organizer processes meeting notices and updates the user's Calendar section automatically.

Note Refer users to the Organizer client Help file for information on scheduling meetings and responding to meeting notices.

The typical sequence of events when scheduling a meeting is depicted in the illustrations. In this first illustration, John wants to schedule a meeting with Denise and book a conference room. (John and Denise are on the same LAN. Denise and the conference room have different agents. John and Denise accept the meeting invitation. The Organizer files for John, Denise, and the conference room process meeting notices automatically.)

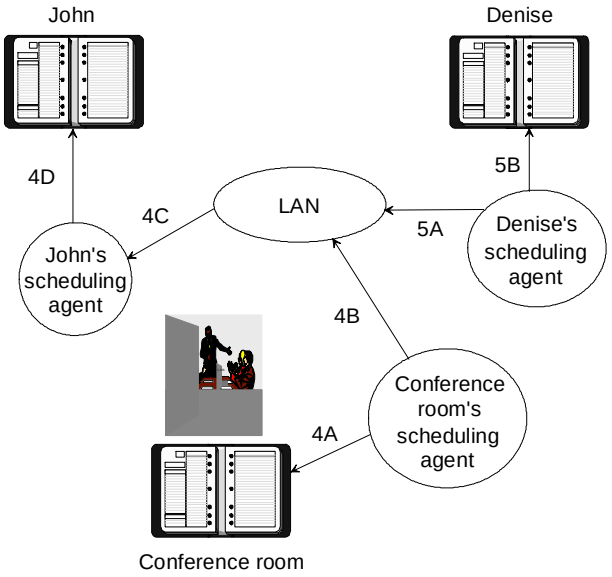


After John chooses Create - Appointment and selects the date, time, and duration for the meeting, he clicks Invite in the Create Appointment dialog box to select attendees and rooms (1). John clicks Names in the Schedule Meeting dialog box and selects Denise from the Notes Name & Address Book or the cc:Mail directory. He then selects the conference room from the list of rooms.

Organizer displays Denise's and the conference room's free and busy times in a graphical format on John's screen. John checks to see when Denise and the conference room are available, selects a date and time, and clicks OK to accept the meeting.

John clicks OK to enter the meeting in his Calendar section and sends the meeting invitations to the scheduling agents assigned to Denise and the conference room (2).

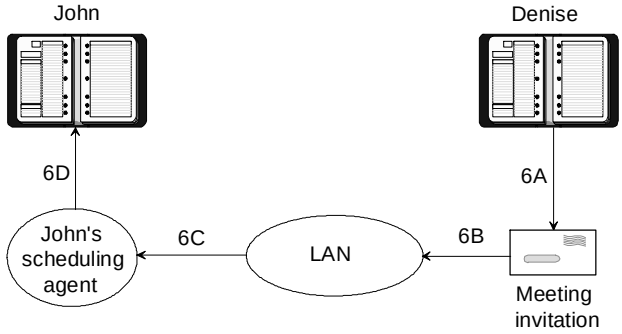
The scheduling agents receive both meeting invitations (3A and 3B).



The conference room's scheduling agent books time in the conference room's Organizer file (4A) and sends a confirmation back to John's scheduling agent (4B) through the LAN.

John's scheduling agent receives this response (4C) and updates the meeting status in John's Organizer file (4D) that the room is booked.

Denise's scheduling agent sends an acceptance back to John's scheduling agent (5A) and sends the meeting acceptance to Denise's Organizer file (5B).



Denise's Organizer file accepts the meeting invitation (6A). Her Organizer file is updated and an acceptance message is sent back to John's scheduling agent (6B).

John's scheduling agent receives Denise's acceptance (6C) and updates the meeting status in John's Organizer file (6D).

Note The scheduling agent tries to deliver meeting notices three times. If the meeting notice is still undeliverable after the third attempt, the scheduling agent returns the notice to the original sender's scheduling agent.

Scheduling meetings across a WAN

Organizer users can schedule meetings across a WAN, provided they have a real-time network connection over the WAN. The Notes or cc:Mail e-mail transport system delivers meeting notices. For example, let's say that John and Denise work for the same company in two separate locations and their user names are listed in the Name & Address Book or cc:Mail directory. If the WAN doesn't support free-time query across their different locations and John wants to schedule a meeting with Denise, he must do so without seeing a graphical display of free time and busy time.

If Denise's name *isn't* listed in John's mail directory or Name & Address book, John can't view Denise's free time because Organizer can't identify what file server Denise's .OR2 file is on. (Organizer can't locate a OrganizerCalendarServer entry for Denise.) Denise won't receive the meeting request in her Organizer file, but she will still receive the meeting notice in her Notes mail database or cc:Mail inbox.

Notes topologies and cc:Mail configurations

The type of Notes topology or cc:Mail configuration you use with Organizer determines where you put Lotus Organizer Scheduling Agent 2.1 and Organizer files. To review examples for configuring the scheduling agent with Notes and cc:Mail, see "Mail-based scheduling examples with Notes" or "Mail-based scheduling examples with cc:Mail," later in this chapter. See the NDEPLOY.WRI and CDEPLOY.WRI files (in the Organizer \ADMIN directory) for information on deployment issues for group scheduling with Lotus Notes and cc:Mail.

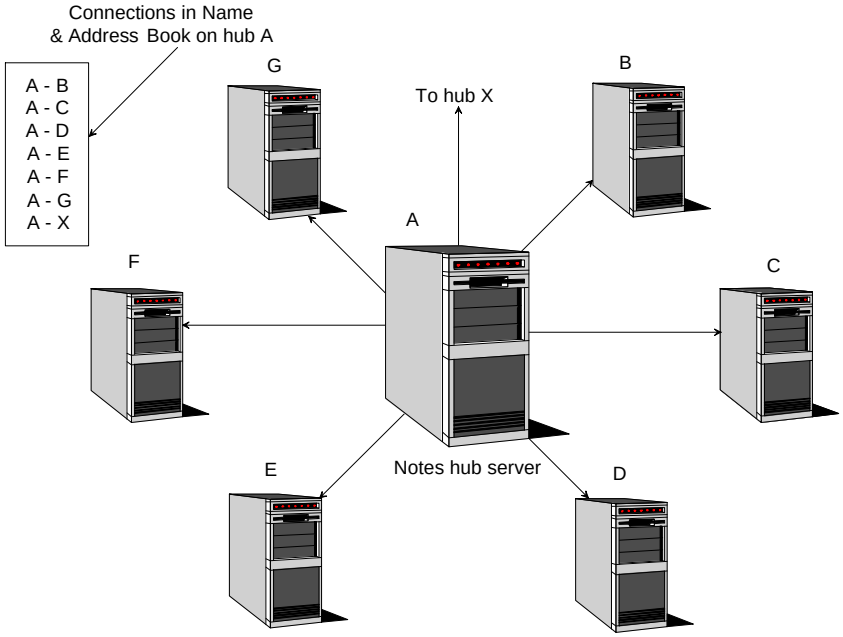
In general, plan on using at least one scheduling agent for each Notes server or cc:Mail post office. This way, there is at least one scheduling-agent mail database for each Notes server or one scheduling-agent mailbox for each cc:Mail post office.

Types of Notes topologies

You can set up Notes servers to route mail or replicate databases in a variety of ways, depending on the number of servers, their locations, and how often mail is sent or how often servers need to be updated. The most common mail routing and replication topologies are the hub-and-spoke, binary tree, and peer-to-peer models.

Hub and spoke

Hub-and-spoke topology refers to one or more hub servers replicating with spoke servers. The Notes hub server calls each spoke according to the schedule, and performs mail routing and/or replication. In the following illustration, replication of hub A takes place with the spokes first, in the following order: B, C, D, E, F, G, and finally when A has finished replicating with its spokes, with hub X.



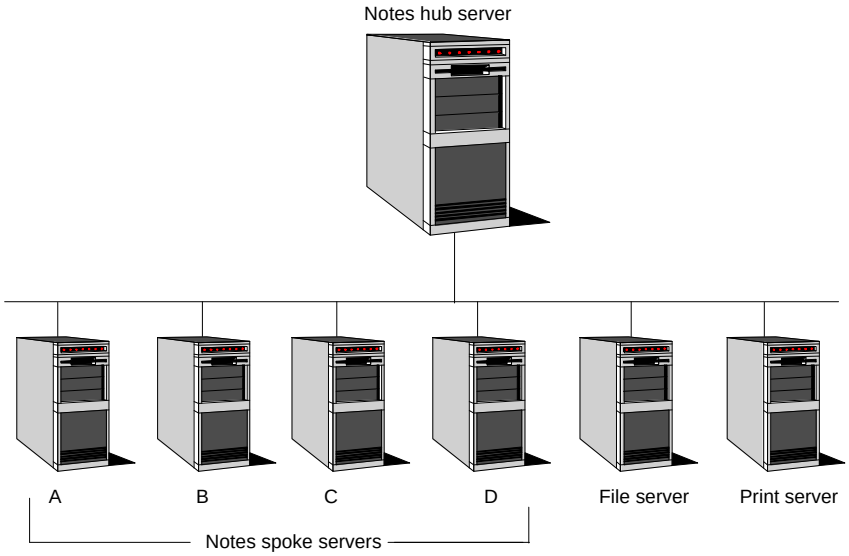
Note For a discussion about how to set up replication for hub-and-spoke connections, refer to the Lotus Notes administrator's guide.

The hub-and-spoke model has the following advantages:

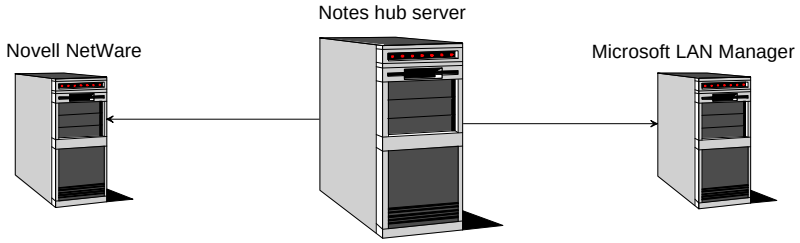
- Controls mail-routing and replication schedules.
- Allows centralized Name & Address Book administration.
- Facilitates mail routing and database replication across multiple LANs and over WANs.
- Uses mail routing, which is peer-to-peer when servers share a common network name with the domain, and all Notes spoke servers in this configuration are only one hop away. Most intra-domain transactions on the LAN are a maximum of two hops away (Notes spoke server, to Notes hub server, to Notes spoke server).

- Can be used to bridge two dissimilar networks if the Notes hub server is set up with multiple protocols.
- Can be designated as mail hubs or replication hubs.

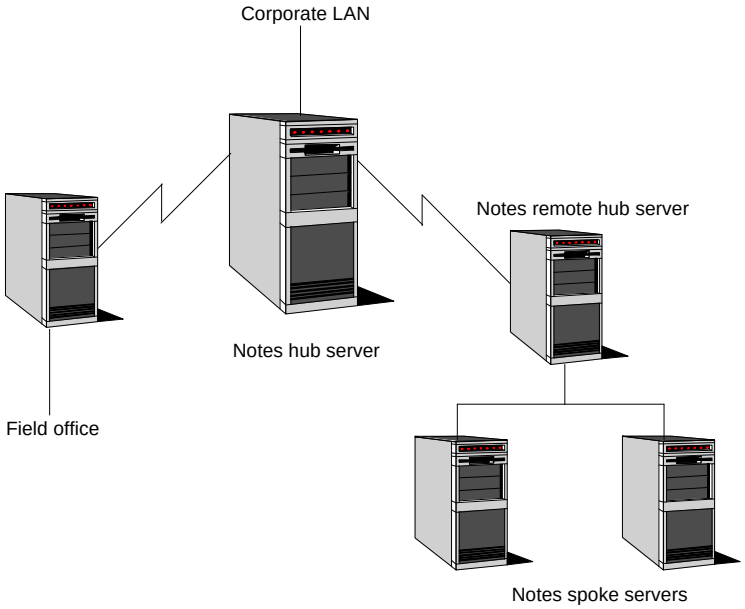
In a single LAN environment, the Notes hub server connects directly to Notes spoke servers or other hubs on the network. The Notes spoke servers provide mail routing and replication services to client workstations.



Notes hub servers connect Notes servers on different networks. Mail is routed and databases are replicated between Notes network servers to the Notes hub server, then from the Notes hub server to a Notes network server. The Notes hub server contains multiple protocols and replica copies of every common database between the different networks.



In the following illustration, the Notes hub server connects a field office LAN and a Notes remote hub server using dial-up lines:

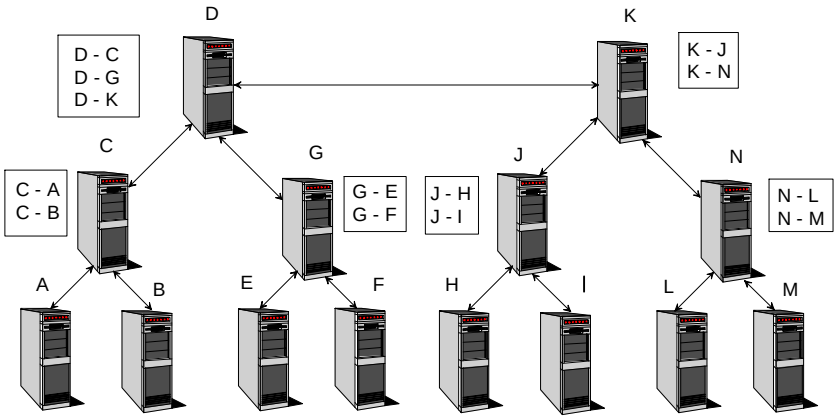


Binary tree

Binary tree topology arranges servers in a series of "mini-hub" configurations where one Notes server becomes the primary mail router with two Notes servers in the next level down. Notes servers at the top level route mail to each other after they finish routing mail to the Notes servers beneath them in the hierarchy. (Replication uses the same process.)

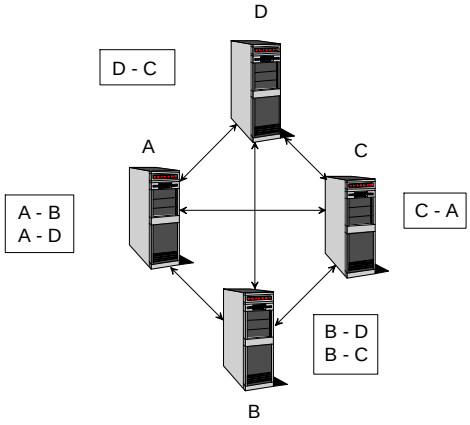
Binary tree topology can work well in international environments where distances between location and local country issues are a consideration. However, mail routing may not work faster than the hub-and-spoke model because binary tree topology may take more time to route mail between the two farthest points.

In the following illustration, boxes show the Name & Address Book connections:



Peer to peer

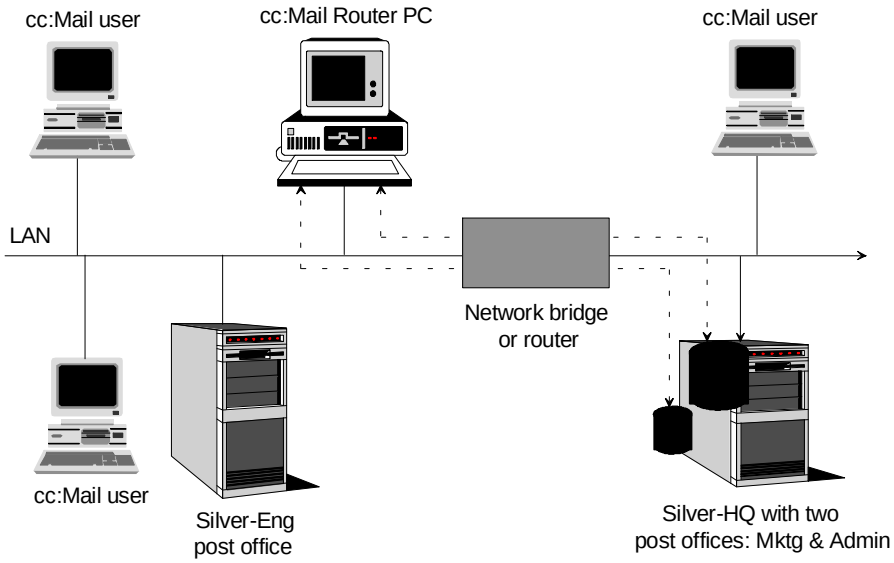
The **peer-to-peer topology** works best for small sites with just a few Notes servers. Connection documents on each Notes server schedule mail routing and / or replication with every other Notes server. In the following illustration, boxes show the Name & Address Book connections:



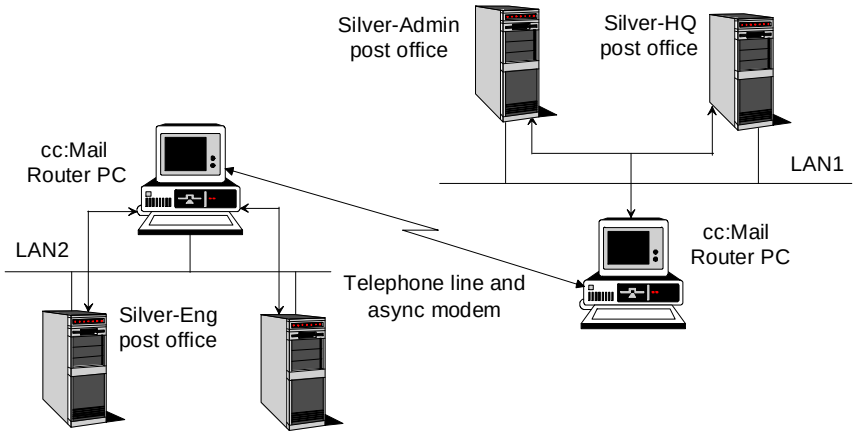
Types of cc:Mail Router PC configurations

There are typically two main types of cc:Mail Router PC configurations.

- A **Type 1 cc:Mail Router PC configuration** supports file-server links within a LAN. This requires a single cc:Mail Router PC to exchange meeting notices between post offices on the same file server within the LAN environment or with remote post offices on LANs connected by network bridges or routers. (Use of the term router should not be confused with the cc:Mail Router program.)



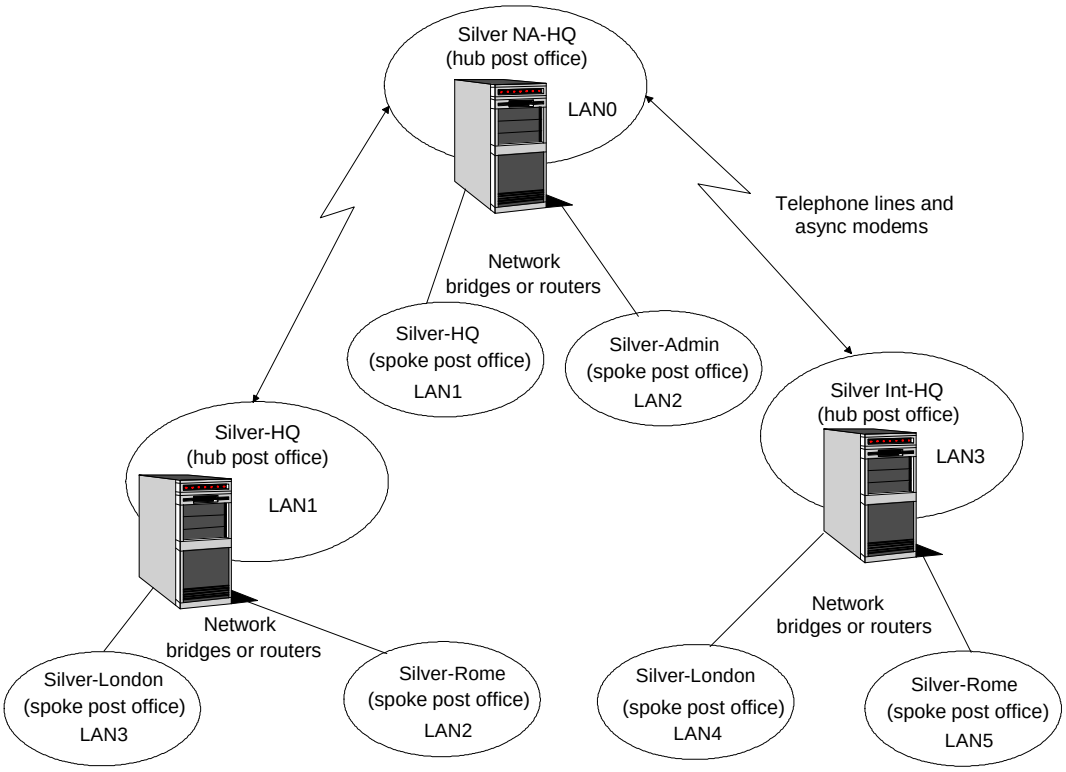
- A **Type 2 cc:Mail Router PC configuration** is a LAN-to-LAN configuration that allows post offices on separate LANs to exchange meeting notices. A Type 2 cc:Mail Router PC configuration is a cc:Mail Router PC to cc:Mail Router PC connection, so there must be a copy of the cc:Mail Router program at each location. This configuration is used when one LAN is connected to a distant LAN by a variety of connections that don't support file-server links (for example, dial-up telephone lines, serial connections, X.25, ISDN, and TCP/IP).



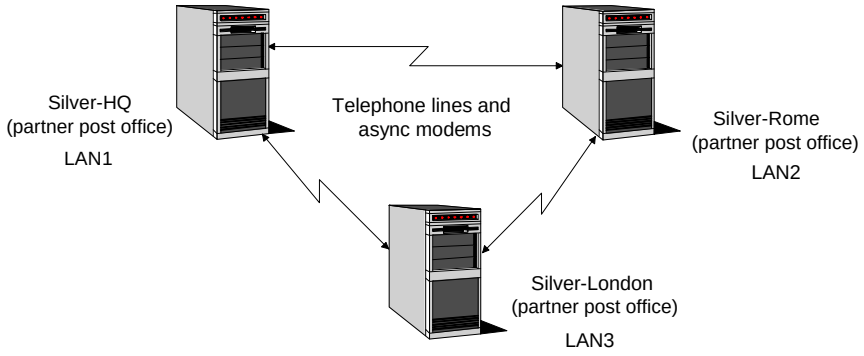
Types of cc:Mail post office configurations

From a message-routing standpoint, there are two common types of cc:Mail post office configurations.

- In the **hub-and-spoke post office configuration**, one post office (the hub) acts as the central controlling post office with other post offices (spokes) dependent on the hub for their mail connections. A hub post office is usually responsible for making all connections to spoke post offices and for routing meeting notices among the spoke post offices.



- The **peer-to-peer post office configuration** interconnects cc:Mail post offices. All cc:Mail post offices are equal in terms of making mail connections. Each cc:Mail post office on the LAN (or connected LANs) runs a separate copy of the cc:Mail Router program, and each cc:Mail post office makes a connection with every other post office with which it intends to exchange meeting notices.



Guidelines for configuring a scheduling agent

While the Notes topology or cc:Mail configuration determines where you put Lotus Organizer Scheduling Agent 2.1 and Organizer files, the following factors influence the decision of how many users to assign to a scheduling agent:

- The number of users on your Organizer network
- The optimal delivery time for meeting notices
- The average number of scheduled meetings per user

When you analyze these factors, you can determine the following:

- The number of scheduling-agent mailboxes or mail databases you need for your site
- Where you should locate the scheduling-agent mailboxes or mail databases

Determining the optimal delivery time for meeting notices

Understanding your users' expectations is an important consideration when you define the optimal delivery time for meeting notices. Typically, users in the same department or post office expect Calendar invitations to be delivered promptly. If this is an important requirement, it can dictate how many scheduling agents you will need.

In a hub post office the Notes router or the cc:Mail Router program might poll two servers for meeting notices every 15 minutes. As a result, a meeting invitation sent from the meeting chairperson to an invitee can take up to 15 minutes to arrive in the invitee's Calendar section (without considering the amount of time to process the scheduling-agent's meeting invitations). You need to determine whether this is an acceptable response time.

Determining each user's average number of scheduled meetings

You'll need to consider the average number of meetings Organizer users schedule each day and the average number of attendees who participate in these meetings. If your company has used a group-scheduling product in the past, this data might be available to you. Looking at this data helps determine how many meeting notices the scheduling agent must process. Then, based on your scheduling-agent workstation configuration, determine if you need to balance the work load by adding more agents to the network.

Determining the number of scheduling agents

Determining the number of scheduling agents depends on your file server or post office configuration and network usage. An Organizer network requires at least one scheduling agent per LAN. Typically, the scheduling agent is located on a Notes server or on a Windows or OS/2 system in cc:Mail environments. (The scheduling agent may also reside on an OS/2 system with a cc:Mail Router program.)

Locating the scheduling-agent's mail databases or mailboxes

The location of the scheduling-agent's mail databases or mailboxes or affects the time required to deliver meeting notices and e-mail traffic overhead. The most important factor in determining the traffic is the number of users on your Organizer network. You can control this by moving the scheduling-agent's mailbox or mail database as shown in the examples in "Mail-based scheduling examples with Notes" or "Mail-based scheduling examples with cc:Mail," later in this chapter.

Scheduling agent summary

If meetings are scheduled among users on the same file server or post office, you can reduce the work load for the Notes router or the cc:Mail Router program by creating one scheduling-agent mail database for each Notes server or one scheduling-agent mailbox for each cc:Mail post office. If meetings are mostly scheduled among users on different Notes servers or post offices, you can reduce the Notes router's or the cc:Mail Router program's work load by creating the scheduling-agent's mail database on

the Notes hub server or the scheduling-agent's mailbox on the cc:Mail post office.

After you establish the minimum number of scheduling agents needed and the location of the scheduling-agent's mailbox, you can decide if your network configuration has enough scheduling agents to handle the anticipated Calendar and mail-traffic work load.

Storing scheduling information

When you use mail-based scheduling with Notes, scheduling information for Organizer is stored in unique Organizer fields in Person documents in the public Name & Address Book. When you use mail-based scheduling with cc:Mail, scheduling information for Organizer users is stored in the Comments field in cc:Mail directory entries.

The following table identifies Organizer entry types and the named attributes for each entry type:

Organizer entry type	*Named attributes used*
Person, room, or resource	OrganizerCalendarPath, OrganizerCalendarServer, OrganizerAgentName, OrganizerEntryType, OrganizerFreeTime
File server	OrganizerServerUser, OrganizerServerPassword, OrganizerServerName
Scheduling agent	OrganizerEntryType
Volume alias (Lotus Organizer Scheduling for the Macintosh™ Release 1.1 entries only)	OrganizerVolumeAlias

The following table defines the field IDs and named attributes for the Organizer entry types:

Field ID	*Attribute name*	*Description*	*Example*
02	OrganizerCalendarPath	Specifies the network path to this Organizer file.	M:\LOTUS\ORG2\ORGFILES\DROSA.OR2
03	OrganizerCalendarServer	Specifies the network file server name and volume.	HQSRV\SYS

Continued

Field ID	*Attribute name*	*Description*	*Example*
04	OrganizerAgentName	Specifies the name of the scheduling agent for this Organizer file.	_OrgAgent
07	OrganizerServerUser	Specifies the network account for accessing Organizer files on file servers that users may not be connected to.	ORGACCT
08	OrganizerServerPassword	Contains the password for the account name specified in field ID 07.	None (password is displayed with asterisks)
09	OrganizerServerName	Specifies alternate file server name for an Organizer entry.	Jeeves
10	OrganizerEntryType	Specifies the Organizer entry type: 1-Scheduling agent; 2-Person; 3-Resource; 4-Room; 5-File server.	2
12	OrganizerFreeTime	Specifies free-time access: 1-Organizer 1.x direct access; 2-Organizer Release 2.1 direct access. (Separate multiple values with commas.)	2
14	OrganizerVolumeAlias	Specifies the NetWare Volume Alias.	DARWIN

Organizer Release 2.1 *doesn't use* field IDs 01, 05, and 06, 11, and 13.

Note Administrators and users of Lotus Organizer Scheduling for the Macintosh Release 1.1: Macintosh users cannot access file server and volume entries if the NetWare volume-aliasing feature is being used to map file server and volume names. The OrganizerVolumeAlias entry allows Lotus Organizer Scheduling for the Macintosh Release 1.1 to translate the OrganizerCalendarServer entry into an alias name that it can use. You can store these alias entries with each person, room, and resource entry (for faster lookup), or as a separate entry type (to save space in the cc:Mail Comments field).

Security

You can secure Organizer (.OR2) files in the following ways:

- Organizer access rights
- Organizer passwords
- Notes security
- cc:Mail security
- Network operating system security

Organizer access rights

Users can grant access to their files to other users on the network. The default access is free time, which lets other users see only a graphical display of free and busy times in the user's Calendar section while doing group scheduling. Refer to "Assigning access levels to an Organizer file" in Chapter 4 for more information.

Organizer passwords

On the LAN, Organizer 2.1 uses the Notes or cc:Mail login and password process to validate a user and permit access to a user's named scheduling file. Users can also set a password on their .OR2 files to prevent access by other users. When users create a password for a file, they must type that password to access the file when they are disconnected from the LAN. Also, when disconnected from the LAN, any other user to whom they granted access rights must enter the password to open the file. Refer users to Organizer client Help file for information on protecting their work with a password.

Note If users take an .OR2 file off the LAN, they may want a password because they don't have a network login to provide security. Organizer 2.1 provides a courtesy dialog box as a reminder to users to create and maintain a password on their files.

Notes security

You should consider the following security issues for the Notes server:

- Ensuring physical protection of the Notes server
- Establishing identity through IDs and certificates
- Using Notes server access lists, restricted directories, and access control lists (ACLs) to protect the Notes server and its databases

Refer to the Lotus Notes administrator's guide for an overview of security concepts related to Notes administration.

cc:Mail security

You should consider the following security issues for the cc:Mail post office:

- Ensuring physical protection of the cc:Mail post office
- Using password protection and password encryption to protect the cc:Mail post office and its mail directory

Refer to the cc:Mail administrator's guide for more information on security concepts related to cc:Mail administration.

Network operating system security

Depending on the network operating system, you have advanced security controls for protecting .OR2 files. For example, login security controls access to the network and rights security determines what tasks users and groups perform with directories and files. Refer to your network operating system documentation for more information.

Mail-based scheduling examples with cc:Mail

The following sections illustrate examples of how certain mail-based scheduling features of Organizer work with cc:Mail.

Scheduling information in cc:Mail

Organizer uses the Comments field non-intrusively. That is, any information already stored in the Comments field, for example, information used by Lotus or third-party gateway products to forward e-mail, is preserved. Lotus Organizer Administration 2.1 adds the string of Organizer scheduling information to the Comments field for each Organizer entry.

The following table summarizes the syntax for scheduling information in the cc:Mail directory:

Characters	*Result*
#!#	Begins and ends the entry.
>	Begins a field ID.
Field ID	A two-digit integer from 00 to 99 that identifies the field.
Field value	A value appropriate for the particular field ID.

Viewing scheduling information

You use Lotus Organizer Administration 2.1 to create and edit Organizer entries in the cc:Mail directory. See Chapter 4 for more information on using Lotus Organizer Administration 2.1. You can also use the cc:Mail ADMIN program to view scheduling information.

1. Start the cc:Mail ADMIN program.
2. Log in to the cc:Mail post office.
3. Enter the cc:Mail post office password.
4. Select the user account whose scheduling information you want to view.
5. Look in the Comments field for scheduling information.

The following example shows a string of scheduling information in a Comments field:

```
#!#>03HQSRV\SYS>02\LOTUS\ORG2\ORGFILES\DROSA.OR2>04_Agent1#!#
```

Note The cc:Mail Comments field is limited to 126 characters.

Free-time search using a static connection

The following example illustrates how free-time search works when users schedule a group meeting.

John wants to schedule a meeting with Denise. John's and Denise's .OR2 files are located on the same file server. Both John and Denise are statically connected to the NetWare file server volume, HQSRV\SYS, which stores the .OR2 files on drive M.

The following table summarizes the Organizer file location in the Comments field for John and Denise in the cc:Mail directory:

User Name	*Loc*	*Free-time search information in the Comments field*
John Valentine	L	>02M:\LOTUS\ORG2\ORGFILES\JVALENTI.OR2
Denise Alison	L	>02M:\LOTUS\ORG2\ORGFILES\DALISON.OR2

Scheduling a meeting

After John chooses Create - Appointment and selects the date and time for the meeting, he clicks Invite in the Create Appointment dialog box to invite attendees.

When John clicks Names in the Schedule Meeting dialog box, Organizer accesses the cc:Mail directory to display cc:Mail user names.

When John selects Denise as an attendee, Organizer obtains Denise's Comments field information, namely

- The names of her file server (HQSRV) and volume (SYS)
- The path of her Organizer file (\LOTUS\ORG2\ORGFILES\DALISON.OR2)

Organizer opens Denise's .OR2 file on the file server, retrieves Denise's free and busy time, and displays her busy-time information on John's screen.

When John clicks OK to accept the meeting, Organizer sends the invitation to Denise's scheduling agent.

Note While Organizer only reads one file at a time, its free-time module temporarily caches four weeks' worth of free-time and busy-time information: the week of the scheduled meeting, the week prior to the scheduled meeting, and two weeks after the scheduled meeting.

Free-time search using dynamic connections

In this example, John's and Denise's .OR2 files are located on two separate NetWare servers: John is on the headquarters file server (HQSRV) and Denise is on an engineering file server (ENGSRV). John doesn't have a static connection to Denise's file server, so Organizer dynamically attaches to Denise's file server.

The following table summarizes the free-time search information in the Comments field for John and Denise in the cc:Mail directory:

User Name	*Loc*	*Free-time search information in the Comments field*
John Valentine	L	>03HQSRV\SYS>02\LOTUS\ORG2\ORGFILES\JVALENTI.OR2
Denise Alison	R	>03ENGSRV\SYS>02\LOTUS\ORG2\ORGFILES\DALISON.OR2
ENGSRV	R	>07ORGACCT>08 *password*
HQSRV	R	>07ORGACCT>08 *password*

Note Organizer encrypts the password after the 08 field.

When John selects Denise as an attendee, Organizer obtains Denise's Comments field information, namely

- The names of her file server (ENGSRV) and volume (SYS)
- The path of her Organizer file (\LOTUS\ORG2\ORGFILES\DALISON.OR2)

Organizer looks for any drive currently mapped to ENGSRV\SYS to access Denise's .OR2 file. If none exists, it creates a dynamic connection to the ENGSRV file server by using the account name and password specified in the 07 and 08 fields of the ENGSRV cc:Mail directory entry.

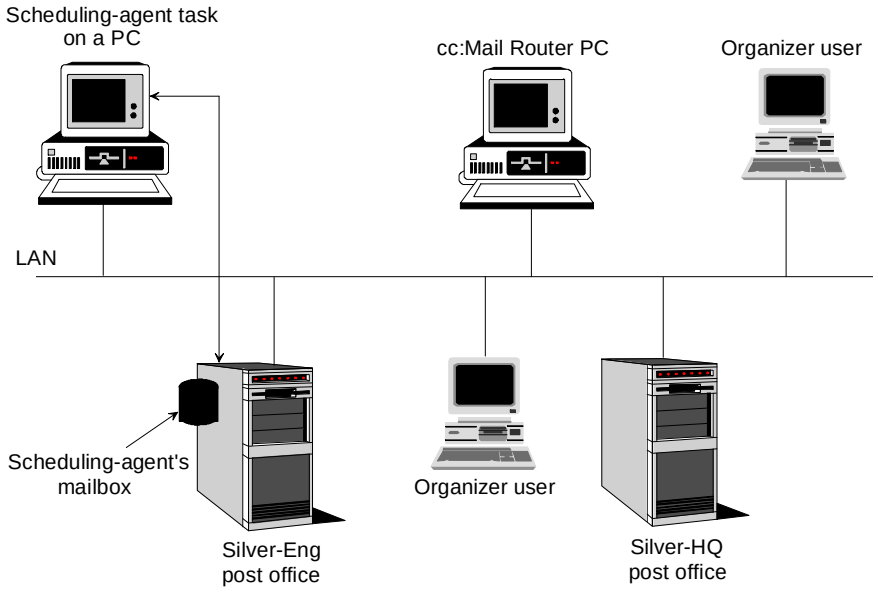
After the connection with ENGSRV is established, Organizer opens Denise's .OR2 file on the file server and reads Denise's busy time. Organizer disconnects from the file server after reading Denise's Calendar. If another user on the same file server is selected, Organizer dynamically reconnects to the file server.

Note Dynamic connections cannot be implemented with certain network operating systems. For example, Organizer doesn't implement dynamic connections on peer-to-peer network operating systems, DEC PATHWORKS, or Banyan VINES.

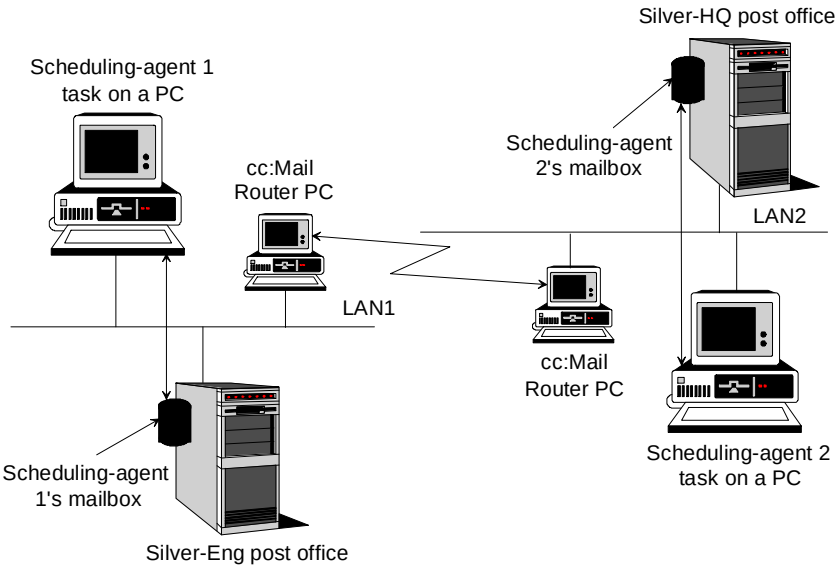
Scheduling agents and cc:Mail Router PC configurations

The following examples illustrate how you might determine the number of scheduling agents for different cc:Mail Router PC configurations:

- A Type 1 cc:Mail Router PC configuration requires at least one scheduling-agent task polling one mailbox.



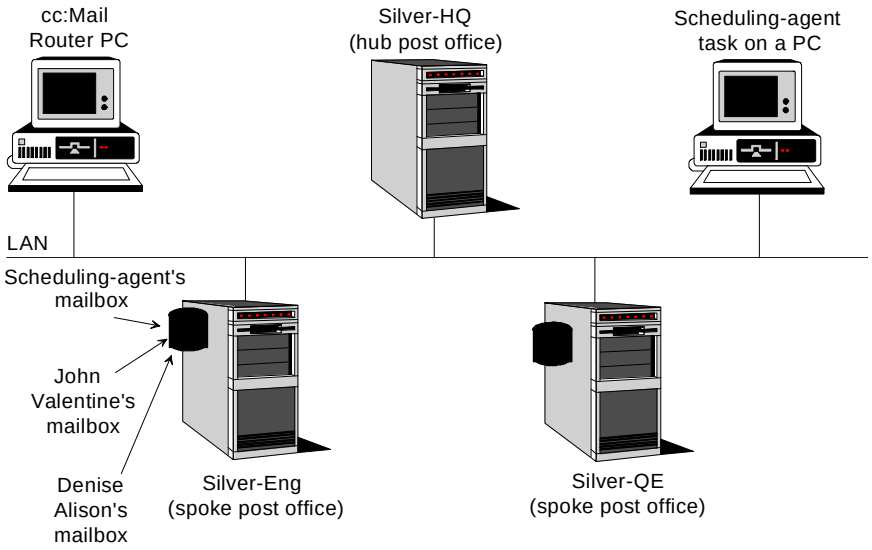
- A Type 2 cc:Mail Router PC configuration requires at least one scheduling-agent task polling message mailboxes at each end of the connection.



Scheduling-agent mailbox on the same post office

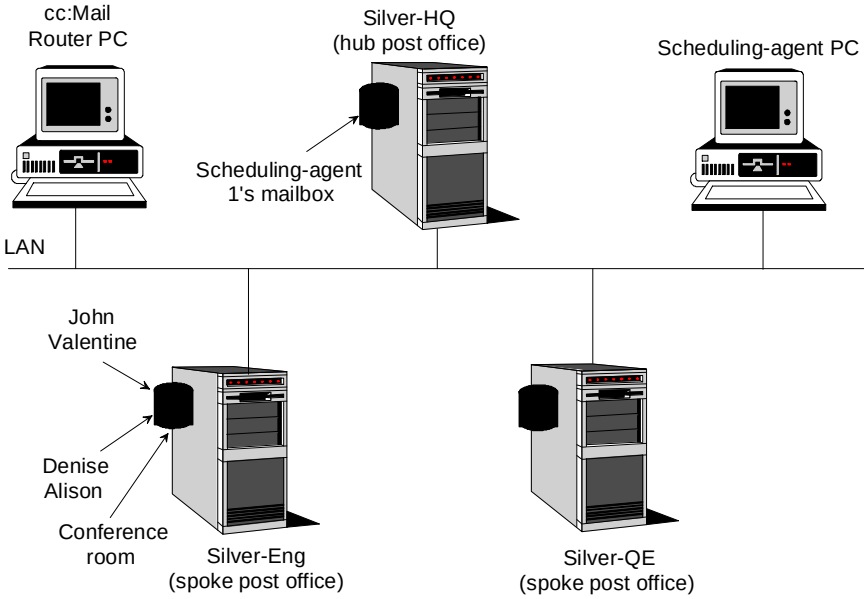
If the scheduling-agent's mailbox is located on a post office named Silver-Eng, and John Valentine and Denise Alison are also located at Silver-Eng, then meeting notices are delivered to the scheduling-agent mailbox promptly.

Note While the delivery time to the scheduling-agent's mailbox on Silver-Eng is immediate, the scheduling-agent task still needs to poll the scheduling-agent mailbox to process meeting notices.



Scheduling-agent mailbox on a hub post office

Suppose you have one hub post office (Silver-HQ) and two spoke post offices—Silver-Eng and Silver Quality Engineering (Silver-QE). Suppose also, there is one scheduling agent (Scheduling-agent 1) with the mailbox on Silver-HQ. All users and conference rooms in Silver-HQ, Silver-Eng, and Silver-QE have Scheduling-agent 1 at Silver-HQ as their agent.



When John Valentine, on the Silver-Eng post office, schedules a meeting with Denise Alison and a conference room (also on the Silver-Eng post office), Organizer and the scheduling agent generate at least the following e-mail messages that are routed by the cc:Mail Router program:

- One mail message from John at Silver-Eng to Denise's and the conference room's scheduling agent (Scheduling-agent 1 at Silver-HQ)
- One response message from Denise at Silver-Eng back to John's scheduling agent (Scheduling-agent 1 at Silver-HQ)
- One response message from the conference room at Silver-Eng back to John's scheduling agent (Scheduling-agent 1 at Silver-HQ)

The time required to deliver the meeting invitation to the scheduling-agent mailbox depends on how often the cc:Mail Router program polls Silver-Eng.

Note This series of e-mail messages assumes the best case scenario, that is, the conference room is administered on a first-come first-served basis and Denise accepts the invitation.

Mail-based scheduling examples with Notes

The following sections illustrate examples of how certain mail-based scheduling features of Organizer work with Notes.

Scheduling information in Notes

When you use mail-based scheduling with Notes, scheduling information for Organizer is stored in unique Organizer fields in each Organizer user's Person document in the public Name & Address Book. You use Lotus Organizer Administration 2.1 to add the Organizer scheduling information in the Person document. For information, see "Editing entries," in Chapter 4.

Viewing scheduling information

1. Open the Notes public Name & Address Book.
2. Choose View - People.
3. Select an entry with Organizer information you want to inspect.
4. Choose Design - Document Info.
5. Select the field name in the Field list box whose value you want to inspect. (Organizer field names begin with the word "Organizer".)

   Notes displays data for the selected field in the dialog box.
6. Click OK.

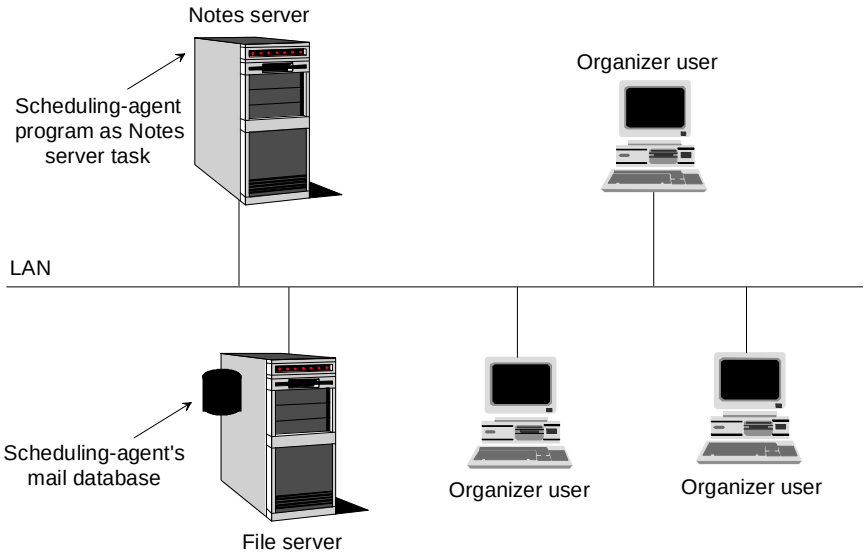
Scheduling agents and Notes server configurations

You can use the following examples to determine the number of scheduling agents for different Notes server configurations with a single domain, multiple domains, and a WAN.

Single domain with scheduling-agent program as add-in server task

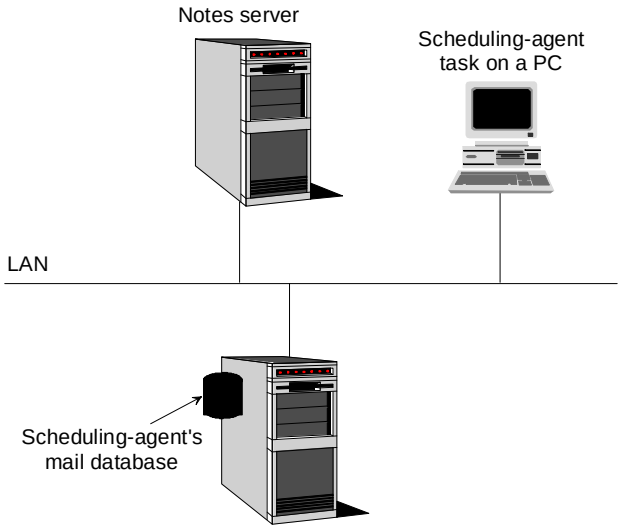
In the following illustration, there is a single Name & Address Book on one Notes server and the scheduling-agent program is running as an add-in task on that Notes server. Both the Name & Address Book and the scheduling-agent program are on the same LAN and there is one file server.

The full path of the scheduling-agent program must be included in the ServerTasks= entry in the Notes server's NOTES.INI file. For example, ServerTasks=Replica,Router,Update,c:\orgagent\orgagnt



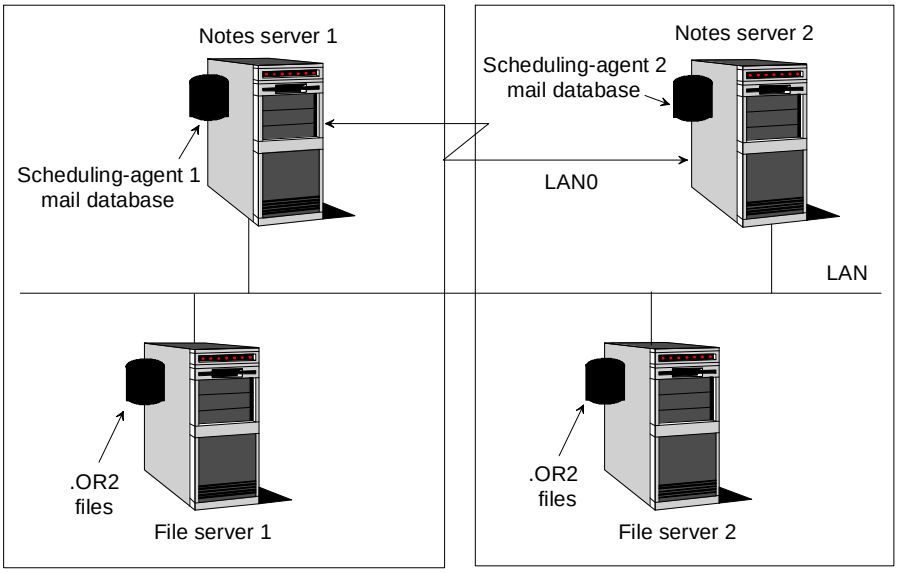
Single domain with scheduling-agent program as stand-alone task

In the following illustration, there is a single Name & Address Book on one Notes server. The scheduling-agent program is running as a stand-alone task on a dedicated PC. Both the Name & Address Book and the scheduling-agent task are on the same LAN and there is one file server.



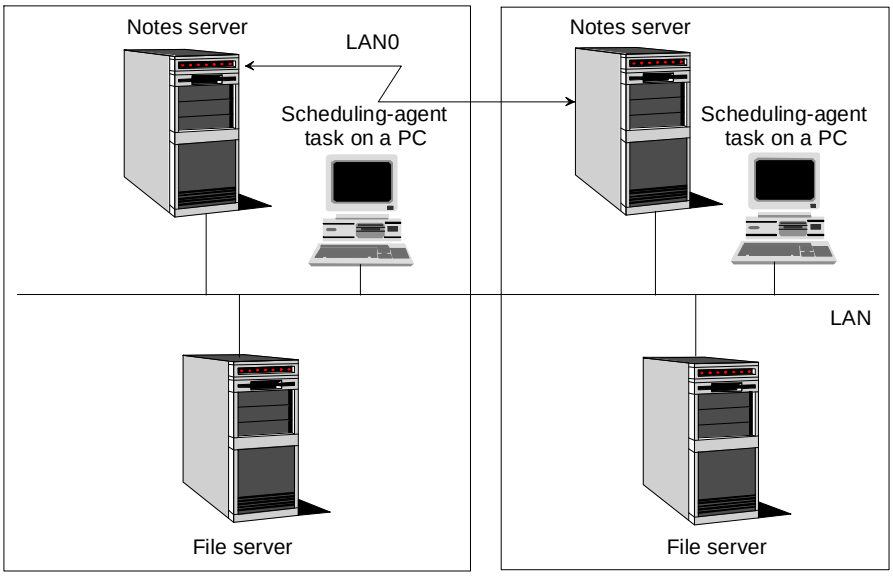
Multiple domains with multiple scheduling agents as add-in server tasks

In the following illustration, there are two Notes domains, one for employees in the corporate office, another for employees in the international office. There are two Name & Address Books on two Notes servers. There is one scheduling-agent program running as an add-in task on each Notes server.



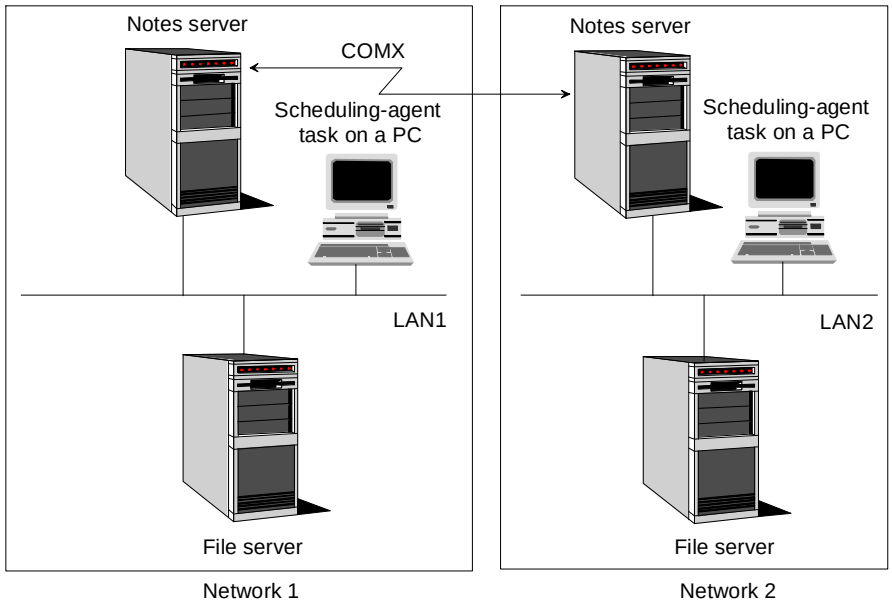
Multiple domains with multiple scheduling agents as stand-alone tasks

In the following illustration, there are two Notes domains, one for employees in the corporate office, another for employees in the international office. There are two Name & Address Books on two Notes servers. There are two scheduling-agent programs running as stand-alone tasks on dedicated PCs. There are two file servers, one for each domain.



WAN configuration

In the following illustration, there are two Name & Address Books on two Notes servers. There are two scheduling-agent programs running as stand-alone tasks on dedicated PCs. There are two LANs and two networks.



Chapter 3
Installing and Setting Up Organizer

This chapter includes procedures for installing and setting up Organizer on a network, and for configuring, installing, and starting the scheduling agents for Windows and OS/2 with cc:Mail and Notes. See the NDEPLOY.WRI and CDEPLOY.WRI files (in the Organizer \ADMIN directory) for information on deployment issues for group scheduling with Lotus Notes and cc:Mail.

To set up group scheduling on a single file server without Notes or cc:Mail, read Chapter 5. To set up Organizer on a network with shared calendaring and no group scheduling, read "Installing Organizer with shared calendaring and no group scheduling," later in this chapter.

Organizer mail-based scheduling installation checklist

Fill out this checklist before you begin so that you easily find and use the information necessary for installing and setting up Organizer.

Item	*Your information*
☐ Type of network (example: NetWare)	_____
☐ Server name where Organizer files are stored (example: HQSRV)	_____
☐ Volume where Organizer files are stored (example: SYS)	_____
☐ Drive letter for Organizer program directory (example: M)	_____
☐ Name of Organizer program directory (example: \LOTUS\ORG2)	_____
☐ Name of directory for Lotus shared tools (example: \LOTUS\LOTUSAPP)	_____
☐ Network account name for Organizer (example: ORGACCT)	_____

Continued

	Item	*Your information*
☐	Network account password (example: SATURN)	_____
☐	Name of Lotus Organizer Scheduling Agent 2.1 (example: _OrgAgent)	_____

Organizer mail-based scheduling installation summary

The following general steps describe how to install Organizer mail-based scheduling on a network. The steps relate directly to sections in this chapter.

- Complete the installation checklist, above.
- (Optional) Review the directory structure for Organizer mail-based scheduling.
- Install the Organizer and the Lotus Organizer Administration 2.1 program files on the file server with the Lotus Organizer 2.1 Install program.
- Specify file server information (assign access rights to file server directories and create a network account for Organizer on each file server where you want to store .OR2 files).
- Configure the scheduling agent for Notes or cc:Mail.
- Install the scheduling agent for Windows or OS/2.
- Start the scheduling agent for Windows or OS/2.
- Install Organizer mail-based scheduling on users' workstations.

Organizer mail-based scheduling directory structure

To use Organizer mail-based scheduling, you must complete a server installation. A **file server installation** copies the Organizer mail-based scheduling files to the file server. Then, each user runs a **node installation** from the network to copy files necessary to run Organizer from their workstations without copying all the files to their hard disks.

The program directory contains Organizer program files. The default name for this directory is \LOTUS\ORG2. You can name the directory anything you want, though Lotus recommends \LOTUS\ORG2.

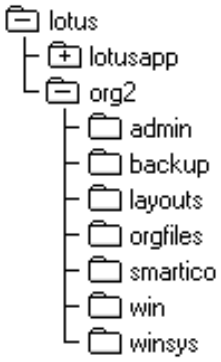
Install creates the following directories in \LOTUS\ORG2. You *shouldn't* change the directory names.

Directory name	*Description*
\ADMIN	Contains files for Lotus Organizer Administration 2.1. (This directory is optional.)
\BACKUP	Stores backup copies of .OR2 files.
\LAYOUTS	Contains report formats and print layouts.
\ORGFILES	Contains Organizer (.OR2) files stored on the file server and sample .OR2 files. Each Organizer file *must* reside on the file server to use Organizer mail-based scheduling.
\SMARTICO	Contains a bitmap file used by Organizer.
\WIN	Contains the ORG2.INI file and the .INI files for the network you select in the Organizer Scheduling Configuration dialog box during Install. These files are copied to the user's Windows program directory when the user runs a Node Install from the network.
\WINSYS	Contains .DLL files that are copied to the user's Windows system directory when the user runs a Node Install from the network.

Install also creates the Lotus shared tools directory (\LOTUSAPP) in the \LOTUS directory. This directory contains subdirectories and files shared by other Lotus applications. You can name this directory anything you want, though Lotus recommends \LOTUS\LOTUSAPP. If you have other Lotus applications installed on the file server, Lotus recommends that you select the same shared tools directory used by the other Lotus applications.

Note The Common Directory entry in the [Lotus Applications] section of the LOTUS.INI file points to the location of the Lotus shared tools directory (for example, M:\LOTUS\LOTUSAPP).

The following illustration shows how Install arranges file server directories for Organizer when you complete a file server installation and select Notes or cc:Mail for group scheduling:



Using Install for mail-based scheduling

Use Install to do the following:

- Record your company name on your copy of Organizer.
- Select Server install to copy Organizer files to the file server.
- Select the Organizer features to install.
- Create the necessary directories for Organizer files.
- Enable group scheduling and choose your scheduling configuration method for Organizer.
- Copy the Organizer and the Organizer Administration program files to the file server.
- Add icons to the Windows program group you select.

Before users can begin using Organizer with mail-based group scheduling, you need to configure the scheduling agent for Notes or cc:Mail. Then, you need to install the scheduling agent for Windows or the scheduling agent for OS/2 with a separate installation procedure, and you need to start the scheduling agent.

Before you run Install

Before you run Install, be sure you have the following:

- The Organizer Release 2.1 disks that came in your package.
- A minimum of 10MB of free disk space on the network file server to store Organizer program files. In addition, you need 2MB of disk space for the additional temporary files that Install requires to perform its installation operation. (Install deletes these temporary files automatically when installation is completed.) Install shows you the amount of disk space you need for the program files, as well as the amount of disk space you currently have available on each drive.
- The installation checklist you completed at the start of this chapter.

Using Install Help

Install consists of a series of dialog boxes that are generally self-explanatory. If you need more information about the installation instructions, use Install Help. You get Help by clicking the Help button in the current dialog box or pressing **ALT+H**.

Running Install

You must run Install using Windows 3.1 or later, running with MS-DOS 5.0 or later.

Note This procedure assumes you are starting Install from a high-density A drive. If you run Install from a different drive, substitute the letter of that drive in this procedure.

1. Log in to the network with full access rights and connect to the file server on which you want to install Organizer.
2. Insert the Lotus Organizer 2.1 Install Disk in drive A and close the drive door.
3. Open the Windows Program Manager and choose File - Run.
4. Type a:install in the Command Line text box and click OK.
5. Enter your company name, select the Install on a file server checkbox, and click Next.

   If you leave your name blank, users enter their names during a node installation, but the company name remains the same for all users.

   Note If you're installing Organizer on a stand-alone workstation, make sure the Install on a file server checkbox is *not* checked.
6. Click Yes to confirm the name you entered in step 5.
7. Select Server install and click Next.
   - Click Open to open the network administrator's guide file (READNET.TXT) or click Next to turn to the next screen without opening the file.
   - Select All features - Automatic install to install the Organizer and Lotus Organizer Administration 2.1 program files, and click Next. (If you click Customize features - Manual install and then click Next, you can decide which Organizer features to install.)
8. Select the drive where you want to copy the program files from the Drive list box, and specify the name of the Organizer program directory.

   (The default drive and directory is C:\LOTUS\ORG2.)
9. Select the drive where you want to copy files in the Lotus shared tools directory, specify the name of the Lotus shared tools directory, and click Next.

   The default drive and directory is C:\LOTUS\LOTUSAPP. If you have other Lotus applications installed on the file server, Lotus recommends that you select the same shared tools directory used by the other Lotus applications.

10. Select the Enable group scheduling features checkbox if it is not selected.
11. Select the type of network you are running from the Network list box, select Notes or cc:Mail from the Scheduling list box, and click Next.

    Note From the Network list box, select MS-Net Compatible for Banyan VINES and DEC PATHWORKS version 4.1 networks. Select LAN Manager for DEC PATHWORKS version 5.0.
12. Follow the remaining instructions that appear on the screen.

Note If you have multiple Notes configurations, the correct NOTES.INI file will be the first file listed in the PATH statement in the AUTOEXEC.BAT file of the workstation where you are installing Organizer.

After you use Install, you need to assign access rights to file server directories and add a network account for Organizer on each file server where you want to store .OR2 files. You use your network operating system software to complete these tasks. See "Specifying file server information," below, for procedures specific to your network.

Specifying file server information

After you install Organizer on the file server, you must do the following:

- Assign access rights to file server directories that contain Organizer program files.
- Add a network account for Organizer on each file server where you want to store .OR2 files.

Each network operating system uses different commands to complete these tasks. This section contains procedures specific to the types of networks Organizer supports. Complete the procedure for your network. Complete additional procedures if you use more than one type of network.

Note For complete information about the commands, see your network operating system documentation. See "Supported networks and access rights," in Chapter 1, for details on full access rights.

Novell NetWare

This section includes the procedure to use with Novell NetWare 386 version 3.11 or later.

This procedure assumes the following:

- You are familiar with Novell NetWare and you have SUPERVISOR rights on all the servers where you intend to install .OR2 files.

- You store .OR2 files in the \ORG2\ORGFILES subdirectory, which is created by Install. (If you use a different subdirectory name, substitute the name of that subdirectory in this procedure.)

By default, directories are not shareable on Novell networks, with the exception of the PUBLIC directory. Directory rights control general access to a directory, its files, and its subdirectories. Refer to the NetWare documentation for details on rights and security.

1. Log in to the first file server as SUPERVISOR.
2. Run SYSCON.
3. Create a group called ORGUSERS.
4. Make everyone who will use Organizer Release 2.1 on this file server, members of the ORGUSERS group.
5. Grant trustee assignments to ORGUSERS.

   Grant users Read (R), Write (W), Create (C), Modify (M), Erase (E), and File Scan (F) rights to the \ORG2\ORGFILES subdirectory.

   Note If you put the \ORG2 and \ORG2\ORGFILES directories in different places on the file server, grant Read (R) rights to the \ORG2 directory. If you are using a separate subdirectory for each user, don't grant Erase (E) rights to the \ORG2\ORGFILES subdirectory. Grant users Erase (E) rights to their own subdirectories.
6. Add a network account, named ORGACCT, with guest rights.

   Note ORGACCT is not needed if all workstations and the scheduling agent PC have drives mapped to the file server that stores the .OR2 files.
7. Grant trustee assignments to ORGACCT.

   Grant users Read (R), Write (W), Create (C), Modify (M), Erase (E), and File Scan (F) access rights to the \ORG2\ORGFILES subdirectory.

   Note Steps 8 through 11 apply only to individual users, not to groups of users.
8. Set a password for ORGACCT.
9. Under Account restrictions, select Limit concurrent connections, and then select No.
10. Select Force periodic password change, and then select No.
11. Select Allow user to change password, and then select No.
12. Exit SYSCON.
13. Repeat steps 1 through 12 for each file server where you want to store .OR2 files.

Note Make sure that users can map a drive to the \ORG2 directory by adding the appropriate command to the system or login script.

Go to "Installing Organizer mail-based scheduling on users' workstations," later in this chapter, to continue your installation.

Microsoft LAN Manager

This procedure assumes the following:

- You are familiar with LAN Manager and you have ADMIN access rights on all the servers where you intend to install .OR2 files.
- You store .OR2 files in the \ORG2\ORGFILES subdirectory, which is created by Install. (If you use a different subdirectory name, substitute the name of that subdirectory in this procedure.)

You can set up your LAN Manager network with either SHARE level security or USER level security. If you are running USER level security, follow *all* instructions below. If you are running SHARE level security, skip steps 4 and 5.

1. Establish a console connection on the first file server with full-access rights and create a resource called ORGANIZE and map it to an appropriate area on the first file server's hard disk.
2. Create a group called ORGUSERS.
3. Make everyone who will use Organizer Release 2.1 on this file server members of the ORGUSERS group.
4. Set access rights for ORGUSERS.

   Grant users Read (R), Write (W), Create (C), Change Attributes (A), and Delete (D) rights to the .OR2 files in the \ORG2\ORGFILES directory.

   Note If you put the \ORG2 and \ORG2\ORGFILES directories in different places on the file server, assign Read (R) access rights to the \ORG2 directory.
5. Set the access rights of the GUEST group with respect to the Organizer resource so that they are the same as the ORGUSERS group.
6. Create a network account, named ORGACCT, in the ORGUSERS group.

   Tip You can use an existing network account instead of creating ORGACCT, provided there is no limit to concurrent connections and the access rights are set up as specified in step 7.
7. Set access rights for ORGACCT.

   The minimum access rights for correct functioning are Read (R), Write (W), Create (C), Change Attributes (A), and Delete (D) in the \ORG2\ORGFILES subdirectory.

8. Set a password for ORGACCT.
9. Repeat steps 1 through 8 for each file server where you want to store .OR2 files.

Go to "Installing Organizer mail-based scheduling on users' workstations," later in this chapter, to continue your installation.

MS-Net compatible networks

This section includes the procedure to use with MS-Net compatible networks.

This procedure assumes the following:

- You are familiar with your network operating system and you have Administrator access rights on all the servers where you intend to install .OR2 files.
- You store .OR2 files in the \ORG2\ORGFILES subdirectory, which is created by Install. (If you use a different subdirectory name, substitute the name of that subdirectory in this procedure.)
- Your network has SHARE level security, that is, access rights to a resource are granted by means of your password and not by the login name.

1. Log in to the first file server as the administrator with full access rights.
2. Share a network resource called ORGANIZE (with a PATH statement to the \ORG2\ORGFILES subdirectory).
3. Set a password for the resource.
4. Grant rights to this resource.

   Grant users Read (R), Write (W), Create (C), Modify (M), and Delete (D) access rights to the files in the \ORG2\ORGFILES subdirectory.

   Note If you put the \ORG2 and \ORG2\ORGFILES directories in different places on the file server, assign Read (R) access rights to the \ORG2 directory. If you are using a separate subdirectory for each user, don't give Delete (D) access rights to the \ORG2\ORGFILES subdirectory. Give users Delete (D) access rights to their own subdirectories.
5. Repeat steps 1 through 4 for each file server where you want to store .OR2 files.
6. Make sure that users have the following command in the network login batch file on their workstations:

   net use *x:* *file server-name*\organize

The following variables are described below:

Variable	*Result*
x	Specifies the drive letter you assign that represents the file server directory and subdirectories. After users connect to the file server directory, they use this drive letter in paths to access file server files.
file server-name	Specifies the name of the file server on which the directory is located.

7. Make sure that users can connect to the Organizer program directory by adding this command in the network login batch file on their workstations.

   net use *x:* *file server-name**resource*

   where *resource* is the name of the Organizer program directory.

Go to "Installing Organizer mail-based scheduling on users' workstations," later in this chapter, to continue your installation.

IBM LAN Server

This procedure assumes the following:

- You are familiar with LAN Server and you have Administrator access rights on all the servers where you intend to install .OR2 files.
- You store .OR2 files in the \ORG2\ORGFILES subdirectory, which is created by Install. (If you use a different subdirectory name, substitute the name of that subdirectory in this procedure.)

If you are using LAN Server, you must map the drive assignments of the scheduling agent machine to the same drive as the scheduling agent's clients.

1. Log in to the first server as the administrator with full access rights.
2. Create an alias called ORGUSERS for the file server directory containing the .OR2 files using one of the following methods:
   - Use a User Logon Detail that you set up to assign users appropriate access rights.
   - Type net use *x:* *file server-name**alias* in the command line.

The following variables are described below:

Variable	*Description*
x	Specifies the drive letter you assign that represents the file server directory and subdirectories. After users connect to the file server directory, they use this drive letter in paths to access file server files.
file server-name	Specifies the name of the file server on which the directory is located.
alias	Specifies the name of the directory and subdirectories that users are connecting to. (The directory is known to the network by its alias.)

For example, the command NET USE M: \\HQSRV\ORGUSERS assigns the drive letter M to the directory known to the network as ORGUSERS on the file server called HQSRV.

3. Make everyone who will use Organizer Release 2.1 on this file server members of the ORGUSERS group.
4. Choose User List from the Access Control menu.
5. Assign access rights to the ORGUSERS file server directory alias.

   Grant users Read (R), Write (W), and Create (C) access rights to the .OR2 files in the \ORG2\ORGFILES directory.

   Note If you put the \ORG2 and \ORG2\ORGFILES directories in different places on the file server, assign Read (R) access rights to the \ORG2 directory.
6. Create a network account, named ORGACCT, in the ORGUSERS group.

   Tip You can use an existing network account instead of creating ORGACCT, provided there is no limit to concurrent connections and the access rights are set up as specified in step 7.
7. Assign Read (R) access rights to ORGACCT.
8. Set a password for ORGACCT.
9. Repeat steps 1 through 8 for each file server where you want to store .OR2 files.

Go to “Installing Organizer mail-based scheduling on users’ workstations,” later in this chapter, to continue your installation.

Configuring a Lotus Organizer Scheduling Agent 2.1 for cc:Mail entry

Before you install the scheduling agent for Windows or the scheduling agent for OS/2, you must configure it for use with cc:Mail. If you don't configure the scheduling agent, it won't process meeting notices. You create the scheduling agent entry in the cc:Mail directory. See Chapter 4 for more information on using Lotus Organizer Administration 2.1.

1. Start Lotus Organizer Administration 2.1.
2. Log in to the cc:Mail post office where you want to create the scheduling agent.
3. Decide on a name for the cc:Mail scheduling agent.

   Each scheduling agent in an organization must have a unique name (for example, _OrgCAgent, where "C" indicates cc:Mail).

   Tip By entering _ (underscore) as the first character in the scheduling agent name, Organizer sorts the scheduling agent to the bottom of the cc:Mail post office when it is displayed in the Names dialog box. This naming technique makes it easier for users to select the scheduling agent when scheduling meetings.
4. Choose Create - Agent.
5. Enter a name for the new scheduling agent in the text box.
6. Click OK.

The new scheduling agent is added as an uppercase "P" directory entry to the cc:Mail post office.

Configuring a Lotus Organizer Scheduling Agent 2.1 for Notes entry

Before you install the scheduling agent for Windows or the scheduling agent for OS/2, you must configure it for use with Notes. If you don't configure the scheduling agent, it won't process meeting notices. See Chapter 4 for more information on using Lotus Organizer Administration 2.1.

A license is not required for the scheduling agent if it runs on the Notes server. The ID to create the scheduling agent as a new user must have Manager access.

In Notes

1. Use Notes to register the scheduling agent as a new user on the Notes server.

(The certification process creates a mail file, an .ID file, and a Person document for the scheduling agent. See the Lotus Notes administrator's guide for more information on registering new users.)

2. In the Register New User dialog box, enter *only* the name for the scheduling agent in the Last Name field. The scheduling agent *doesn't* use the First Name and MI fields.

   If you're using Notes with distinguished names, refer to the scheduling agent with its full distinguished name. Each scheduling agent in an organization must have a unique name.

   Tip By entering _ (underscore) as the first character in the scheduling agent name, Organizer sorts the scheduling agent to the bottom of the Notes Name & Address Book when it is displayed in the Names dialog box. This naming technique makes it easier for users to select the scheduling agent when scheduling meetings.

3. In the Register New User dialog box, click Other User Settings.
4. In the Store User ID group box, select In file.
5. Click OK.
6. Click Register.

Tip When you have created the new scheduling agent, if you're using the distinguished naming scheme in Notes, be sure to refer to the scheduling agent with its full distinguished name during Install.

When the Person document for the scheduling agent is created, it has no Organizer fields. (You can verify this by selecting the scheduling agent's Person document and choosing Design - Document Info.) You must use Lotus Organizer Administration 2.1 to add the Organizer information to the scheduling agent's Person document.

In Lotus Organizer Administration 2.1

When you start Lotus Organizer Administration 2.1 you must have a Notes ID with Manager or Editor access. If you only have Editor access to the Notes Name & Address Book, you must use a text editor to add the AdminGroup entry to the [Org Admin] section of the ORG2.INI file. See "Maintaining the ORG2.INI file," in Chapter 4, for more information.

1. Start Lotus Organizer Administration 2.1.
2. Log in to the Notes Name & Address Book that contains the Person document for the scheduling agent you created in Notes.
3. Select the scheduling agent entry in the Lotus Organizer Administration 2.1 window.

4. Choose Edit - Edit Selected.

   Notice that the scheduling agent entry has no scheduling agent icon or Organizer information.

5. Select Agent as the Organizer entry type and click OK.

To verify that the Organizer information has been added to the scheduling agent entry, return to Notes, select the scheduling agent's Person document and choose Design - Document Info. Scroll to OrganizerEntryType. See that its value is 1 (scheduling agent).

Configuring LMEF Release 3.1 for use with Organizer 2.1

See the NDEPLOY.WRI and CDEPLOY.WRI files (in the Organizer \ADMIN directory) for additional information on how Organizer 2.1 works with LMEF Release 3.1 to schedule meetings between Notes users with distinguished names and cc:Mail users and vice versa.

To enable LMEF Release 3.1 to exchange Organizer information between Notes and cc:Mail users

1. Install LMEF and set the cc:Mail Foreign Alias Name (FAN) field to Yes.
2. Use a text editor to add the following entry to the [Scheduling] section of the ORG2.INI file for Organizer for cc:Mail:

   LMEF=1

   When the LMEF entry is set to 1, Organizer reads and scans the cc:Mail Foreign Alias Name (FAN) field for abbreviated names for Notes entries so that mail is routed correctly to a Notes user from cc:Mail. When set to 0, Organizer doesn't read or scan the FAN field for abbreviated names.

   Tip Because you have to add the LMEF entry to the [Scheduling] section manually, you should modify the ORG2.INI file (located in the \WIN subdirectory of the directory specified during a file server install) with this entry after you complete a file server install. Then, users will be set up with the proper LMEF support when they complete an Organizer node installation.

3. When you configure LMEF, type Yes in the Lotus Organizer Support field in the Lotus Mail Exchange Facility Foreign Domain form.

   Note For more information about configuring LMEF, refer to the Lotus Mail Exchange Facility Release 3.1 *Administrator's Guide.*

4. Compose and save an Organizer cc:Mail Agent document for each scheduling agent in the cc:Mail directory. Enter the following information in each of these documents:
   - The name for the cc:Mail scheduling agent in the Agent Name field
   - The name of the LMEF foreign domain in the LMEF Domain Name field
   - Your name in the Owner field
   - (Optional) Any identifying information in the Comments field

   Note The name for the cc:Mail scheduling agent must be the same name that appears in the cc:Mail directory (for example, _OrgCAgent).
5. Start the Directory Exchange component of LMEF with the reload function.

   The reload function copies users' Organizer information from the Notes Name & Address Book to the cc:Mail directory and vice versa. (The reload function copies other user information between Notes and cc:Mail, as well.)
6. Start the Mail Exchange component of LMEF.

Mail Exchange transfers Organizer meeting notices between Notes and cc:Mail, letting users include both Notes mail users and cc:Mail users on their meeting lists.

If you change the entry in the Lotus Organizer Support field in the Lotus Mail Exchange Facility Domain form, you must

- Use the reload function again to resynchronize the Notes Name & Address Book and cc:Mail directory.
- Select Mail Server or Domain in the Notes to cc:Mail Filter Type field in the Lotus Mail Exchange Facility Domain form.
- Type ~~~ExcludeOrganizerAgents in the Notes to cc:Mail Exclude List field in the Lotus Mail Exchange Facility Domain form.
- Save the Lotus Mail Exchange Facility Domain document.

Installing Lotus Organizer Scheduling Agent 2.1 for Windows

You may install and run Lotus Organizer Scheduling Agent 2.1 for Windows as either a stand-alone task (Notes or cc:Mail), or as an add-in server task (Notes only). You must install Lotus Organizer Scheduling Agent 2.1 for Windows directly on the system or Notes server where it will run. Until you install the add-in server task scheduling agent, the ServerTasks entry in the NOTES.INI file has no Organizer entry.

The Notes scheduling agent for Windows requires that the Notes client or server software has already been installed on the workstation where you are installing the scheduling agent. If the Notes software has not been installed, the scheduling agent will not run.

The cc:Mail scheduling agent for Windows requires VIM DLLs in order to run. See "System requirements", in Chapter 1 for more information. (The cc:Mail client software does not need to be installed.) You can obtain the cc:Mail VIM DLLs from the cc:Mail Bulletin Board, CompuServe, or cc:Mail Technical Support.

Note The mail-system program directory (Notes or cc:Mail) that contains the VIM DLLs must appear first in the PATH statement in the AUTOEXEC.BAT file on the workstation where you are installing the scheduling agent. For more information, see "VIM compatibility," in Chapter 4.

Use the scheduling agent for Windows Install program to do the following:

- Create the directory for the scheduling agent for Windows program files.
- Install the scheduling agent for Windows program files.
- Specify your mail system (Notes or cc:Mail).
- Specify the type of network you are running.
- Specify whether to install the scheduling agent for Windows as a stand-alone task (Notes or cc:Mail) or as an add-in server task (Notes only).
- Enter initialization values in the [Agent] section of the ORG2.INI file.
- Create the program icon for the scheduling agent (for stand-alone scheduling agent tasks only).

The scheduling agent for Windows Install installs different versions of certain program files and .DLLs based on your network and mail system. If you change the network or mail system you specified during Install, you must reinstall the scheduling agent. You can change the scheduling agent's initialization entries in the Agent Preferences dialog box or by editing the ORG2.INI file. See "Changing ORG2.INI file initialization entries," in Chapter 4, for details.

Before you run Lotus Organizer Scheduling Agent 2.1 Install for Windows

Before you run Lotus Organizer Scheduling Agent 2.1 Install for Windows, be sure you have the following:

- A properly configured Lotus Organizer Scheduling Agent 2.1 entry for cc:Mail or Notes.
- Lotus Organizer Scheduling Agent 2.1 for Windows Install disk that came in your package.
- A minimum of 4MB of free disk space to store the scheduling agent for Windows program files. Install shows you the amount of disk space you need for the scheduling agent for Windows program files, as well as the amount of disk space you currently have available on each drive.

Note This disk space requirement doesn't include the disk space required for Organizer .ORS attachments, other Organizer attachments, and the scheduling agent for Windows log file. The scheduling agent for Windows processes only one message at a time, but must have enough temporary disk space to detach the .ORS attachment and all Organizer attachments in the message. (The scheduling agent places attachments in the same directory as the recipient's Organizer file.)

Running Lotus Organizer Scheduling Agent 2.1 Install for Windows

You must run Lotus Organizer Scheduling Agent 2.1 Install for Windows from Windows 3.1 or later.

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

1. Insert the Lotus Scheduling Agent 2.1 Install for Windows disk in drive A and close the drive door.
2. Open the Windows Program Manager and choose File - Run.
3. Type a:install in the Command Line text box and click OK.
4. Enter your name and company name and click Next.
5. Click Yes to confirm the names you entered in step 4.
6. Select the type of scheduling agent you want to install (cc:Mail Windows Agent or Lotus Notes Windows Agent).
7. Select the drive where you want to copy the program files from the Drive list box, specify the name of the scheduling agent for Windows program directory, and click Next.

   (The default drive and directory is C:\ORGAGENT.)
8. Select the type of network you are running from the Network list box.

9. Enter the same scheduling agent name that you used when you configured the scheduling agent.
   - For cc:Mail, include the full path to the cc:Mail post office.
   - For Notes, enter the same scheduling agent name that you used when you configured the scheduling agent. This name must have Author access to the scheduling agent's mail file. Be sure to enter the scheduling agent's name in the full hierarchical naming scheme (for example, _OrgAgent/Inferno).
10. Enter the full path for the scheduling agent log files in the Log Files Path field, a value of at least 1 (for one second) in the Poll time field, and click Next.

    Note For Notes, also specify whether to install the stand-alone or Notes server-task scheduling agent.

    Poll time is defined as the time the scheduling agent waits before looking for new meeting notices. The recommended setting is 60 seconds (every minute).

    The scheduling agent for Windows Install writes initialization entries for what you enter here in the [Agent] section of the ORG2.INI file. See "Maintaining the ORG2.INI file", in Chapter 4, for more information.
11. Follow the remaining instructions that appear on the screen.
12. After completing the installation, reboot Windows and the system on which you installed the scheduling agent.

Starting and ending the stand-alone scheduling agent for Windows

Use the following procedures to start and end the stand-alone scheduling agent for Windows.

Starting the stand-alone scheduling agent for Windows

1. Make certain the mail-system program directory is in the PATH statement of your AUTOEXEC.BAT file.

   If you have multiple mail-system directories, the one you specify for the scheduling agent must be the first mail system (cc:Mail or Notes) in the PATH statement of your AUTOEXEC.BAT file.
2. Start Windows.

3. Display the Program Manager window.

   (If necessary, open the group window that contains the Lotus Organizer Scheduling Agent 2.1 program icon. The default program group name is Lotus Applications.)

4. Double-click the Lotus Organizer Scheduling Agent 2.1 program icon.

Ending the stand-alone scheduling agent for Windows

Choose File - Exit or press **ALT+F4**.

Starting and ending the add-in server-task scheduling agent for Windows

Use the following procedures to start and end the add-in server-task scheduling agent for Windows on a Notes server.

Starting the add-in server-task scheduling agent for Windows

1. If the Notes server is already running, exit the Notes server by typing q (for Quit) at the Notes server console.
2. Start the Notes server by double-clicking the Notes Server icon to start the Server tasks.

   The scheduling agent will start to process the meeting notices located in its mail file. If applicable, you will be asked to enter the password for the Notes server ID file.

When the add-in server-task scheduling agent for Windows is installed on the Notes server, Lotus Organizer Scheduling Agent 2.1 for Windows Install adds the full path of the scheduling agent for Windows executable to the ServerTasks= entry in the Notes server's NOTES.INI file.

, <path>\orgagnt

For example,

ServerTasks=Replica,Router,Update,c:\orgagent\orgagnt

If the NOTES.INI file for the stand-alone scheduling agent does not include this information or if your Notes server is located in the Notes data directory (and not in the Windows program directory), you must edit the NOTES.INI file and append the full path information.

Ending the add-in server-task scheduling agent for Windows

Type q (for Quit) at the Notes server console to exit the Notes server.

Note If you no longer want to run the add-in server-task scheduling agent for Windows, you must remove the path to the add-in server task .EXE file from the Notes server's NOTES.INI file.

Installing Lotus Organizer Scheduling Agent 2.1 for OS/2

Note Organizer 2.1 scheduling agents for OS/2 are 32-bit applications.

You can install and run Lotus Organizer Scheduling Agent 2.1 Install for OS/2 on a Notes OS/2 server as a stand-alone task or an add-in server task, or as a stand-alone task on an OS/2 system that has access to the cc:Mail post office. Lotus Organizer Scheduling Agent 2.1 for OS/2 is registered as a user in the Notes public Notes Name & Address Book or as a directory entry in the cc:Mail directory.

The Notes scheduling agent for OS/2 requires that the Notes client or server software has already been installed on the workstation where you are installing the scheduling agent. If the Notes software has not been installed, the scheduling agent will not run.

The cc:Mail scheduling agent for OS/2 requires VIM DLLs in order to run. See "System requirements," in Chapter 1 for more information. (The cc:Mail client software does not need to be installed.) You can obtain the cc:Mail VIM DLLs from the cc:Mail Bulletin Board, CompuServe, or cc:Mail Technical Support. The file name is VDLOS2.ZIP.

Note The mail-system program directory (Notes or cc:Mail) that contains the VIM DLLs must appear in the LIBPATH statement of the CONFIG.SYS file on the workstation where you are installing the scheduling agent.

You use the scheduling agent for OS/2 Install program to do the following:

- Create the directory for the scheduling agent for OS/2 program files.
- Copy the scheduling agent for OS/2 program files and the required .DLLs for your network to the OS/2 server.
- Select the type of network you are running.
- Select your mail system (Notes or cc:Mail).
- Select to install the scheduling agent for OS/2 as a stand-alone task (Notes or cc:Mail) or as an add-in server task (Notes only).
- Create the folder and program icon for the scheduling agent for OS/2.
- Enter initialization values in the [Agent] section of the ORG2.INI file.

Lotus Organizer Scheduling Agent 2.1 Install for OS/2 installs different versions of certain program files and .DLLs based on your network and mail system. If you change the network or mail system you specified during Install, you must reinstall the scheduling agent. You can change the scheduling agent's initialization entries in the Agent Preferences dialog box by editing the ORG2.INI file. See "Changing ORG2.INI file initialization entries," in Chapter 4, for details.

The scheduling agent for OS/2 uses specific .DLLs to communicate between the network and the scheduling agent. The scheduling agent for OS/2 provides three classes of networks for processing meeting notices from Organizer users: NetWare version 3.11 or later, LAN Server, and MS-Net compatible.

- **NetWare Requestor version 2.1 or later** lets the scheduling agent for OS/2 search for an Organizer user's .OR2 file by locating file server and volume instead of the drive letter that is mapped to a volume on the file server. For example, an Organizer user has .OR2 files on file server and volume HQSRV\SYS. (Organizer stores this information in unique Organizer fields of a Person document in the public Notes Name & Address Book or in the Comments field in the user's cc:Mail directory entry.)

  To locate the .OR2 file, a scheduling agent for OS/2 that uses Novell support searches the network for HQSRV\SYS instead of a drive letter that is mapped to HQSRV\SYS. The scheduling agent for OS/2 then finds the .OR2 file on the path specified by the OrganizerCalendarPath attribute, for example, \ORG2\ORGFILES\CLIENT.OR2.

- **LAN Server** lets the scheduling agent for OS/2 search for an Organizer user's .OR2 file by locating file server and sharename instead of the drive letter that is mapped to a sharename on the file server. Select LAN Server if you are using LAN Server 3.0.

- **MS-Net compatible** runs the scheduling agent for OS/2 with a network other than Novell. If your version of Novell is not supported by Lotus Organizer Scheduling Agent 2.1 Install for OS/2's Novell configuration, the scheduling agent for OS/2 can't search for the Organizer user's Calendar file server by locating the file server and volume. Instead, you must include a drive letter in the CalendarPath.

For example, if an Organizer user's .OR2 file is located on Server\Volume HQSRV\SYS, which is mapped to O, and the PATH statement to the .OR2 file is \ORG2\ORGFILES\CLIENT.OR2, you must set the OrganizerCalendarPath attribute in the Person document or the Comments field to M:\ORG2\ORGFILES\CLIENT.OR2.

You must map the file server to the same drive letter as the user's OrganizerCalendarPath named attribute or the scheduling agent for OS/2 won't process meeting notices for that user.

Before you run Lotus Organizer Scheduling Agent 2.1 Install for OS/2

Before you run Lotus Organizer Scheduling Agent 2.1 Install for OS/2, be sure you have the following:

- A properly configured Lotus Organizer Scheduling Agent 2.1 entry for cc:Mail or Notes
- The Lotus Scheduling Agent 2.1 for OS/2 Install disks that came in your package
- A minimum of 4MB of free disk space on the file server to store the scheduling agent for OS/2 program files

Note This disk space requirement doesn't include the disk space required for Organizer .ORS attachments, other Organizer attachments, and the scheduling agent for OS/2 log file. The scheduling agent for OS/2 processes only one message at a time, but must have enough temporary disk space to detach the .ORS attachment and all Organizer attachments in the message. (The scheduling agent places attachments in the same directory as the recipient's Organizer file.)

Running Lotus Organizer Scheduling Agent 2.1 Install for OS/2

You must run Lotus Organizer Scheduling Agent 2.1 Install for OS/2 from OS/2 2.1 or later. You can run Install from either an OS/2 window or an OS/2 full screen.

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

1. Log in to the network with full access rights and connect to the file server on which you want to install the scheduling agent for OS/2.
2. Start an OS/2 session.
3. Insert the Lotus Organizer Scheduling Agent 2.1 Install for OS/2 Disk 1 in drive A and close the drive door.
4. From either an OS/2 window or an OS/2 full screen, type a:install.

   Install displays a screen that summarizes the installation steps.
5. Type Y to continue.
6. Enter the drive and the name of the scheduling agent for OS/2 program directory.

   (The default drive and directory is C:\ORGAGENT.)

7. Select a mail system (Notes or cc:Mail).
8. Select the type of network you are running.

   Install copies the .DLLs for the network to the scheduling agent program directory.
9. Select whether to install the scheduling agent for OS/2 as a stand-alone task (Notes or cc:Mail) or as an add-in server task (Notes only).

   If you select add-in server task, the scheduling agent for OS/2 Install asks if you want it to edit the NOTES.INI file. If you type Y, the scheduling agent for OS/2 Install adds the full path of the scheduling agent for OS/2 executable to the ServerTasks= entry in the Notes server's NOTES.INI file. If you type N, you must edit the NOTES.INI file and append the full path information yourself.
10. Type Y to let Install create the Organizer Agent for OS/2 folder and the Lotus Organizer Scheduling Agent 2.1 program icon.
11. Install prompts you for the name of the scheduling agent.
    - For cc:Mail, enter the full path to the cc:Mail post office for the container path and in the scheduling agent name.
    - For Notes, enter the same scheduling agent name that you used when you configured the scheduling agent. Enter the scheduling agent's name in the full distinguished naming scheme (for example, _OrgAgent/Inferno). If you don't enter the full distinguished name, the scheduling agent won't run. This name must have Author access to the scheduling agent's mail file.
12. Install prompts you for the following initialization entries that it places in the [Agent] section of the ORG2.INI file:
    - GatewaySession
    - PollFrequency
    - RetryFrequency
    - MaxLogFiles
    - LogFilesDir
    - OutputDetail

    If you press **ENTER** at any prompt, you accept the default.

    The scheduling agent for OS/2 Install writes initialization entries for what you enter here in the [Agent] section of the ORG2.INI file. See "Maintaining the ORG2.INI file," in Chapter 4, for more information.
13. Shut down and reboot OS/2 in order for changes to the CONFIG.SYS file to take effect.

14. If you selected add-in server task, shut down and reboot the OS/2 Notes server for changes to the NOTES.INI file to take effect.

Starting and ending the stand-alone scheduling agent for OS/2

Use the following procedures to start and end the stand-alone scheduling agent for OS/2.

Starting the stand-alone scheduling agent for OS/2

1. From the OS/2 desktop, double-click the folder that contains the Lotus Organizer Scheduling Agent 2.1 program icon.

2. Double-click the Lotus Organizer Scheduling Agent 2.1 program icon.

Ending the stand-alone scheduling agent for OS/2

Choose File - Exit.

Starting and ending the add-in server-task scheduling agent for OS/2

Use the following procedures to start and end the add-in server-task scheduling agent for OS/2.

Note For Organizer 2.1, if you run the add-in server-task scheduling agent for OS/2 on a Notes server, you cannot run QNC.EXE.

Starting the add-in server-task scheduling agent for OS/2

1. If the Notes server is already running, exit the Notes server by typing q (for Quit) at the Notes server console.
2. Run the Notes server by selecting the Notes Server icon to start the Server tasks. The scheduling agent will start to process the meeting notices located in its mail file.

   If applicable, you will be asked to enter the password for the Notes server ID file.

Ending the add-in server-task scheduling agent for OS/2

Remove the path and executable name of the add-in server-task scheduling agent for OS/2 from the ServerTasks= entry in the Notes server's NOTES.INI file.

Installing Organizer mail-based scheduling on users' workstations

Users install Organizer mail-based scheduling by running Node Install. The following list contains the information you should supply to your users when they install with Node Install:

- The drive letter and name of the program directory where you installed Organizer (for example, M:\LOTUS\ORG2)
- Directions for starting Organizer

Refer users to Chapter 1 in *Exploring Organizer* for instructions on starting Organizer.

Running Node Install

1. Log in to the network and connect to the file server on which your administrator installed Organizer.
2. Start Windows.
3. Choose File - Run.
4. Enter the drive letter and name of the network directory where your administrator installed Organizer, followed by the name of the Install program (for example, M:\LOTUS\ORG2\INSTALL.EXE), and click OK.
5. Enter your name and click Next.
6. Click Yes to confirm the name entered in step 5.
7. Select the drive where you want to copy the Organizer files, specify the name of the Organizer program directory, and click Next.
8. Select the Organizer files you want to install on your hard disk.
9. Follow the remaining instructions that appear on the screen.

Installing Organizer with shared calendaring and no group scheduling

When you configure Organizer to run on a file server with shared calendaring and no group scheduling, users run Organizer from the network and use it as a stand-alone PIM. There are two methods to copy Organizer files to the file server.

- **File server installation** copies all the Organizer single-scheduling files to the file server. Then, each user runs a Node Install from the network to copy files necessary to run Organizer from their workstations without copying all the files to their hard disks.

- **Network distribution** copies Organizer Install disks to the file server in compressed form. This method lets users install a stand-alone copy of Organizer by using the files on a file server instead of the Install disks.

Using Install

Use Install to do the following:

- Record your company name on your copy of Organizer.
- Select the type of installation to copy Organizer files to the file server.
- Select the Organizer features to install.
- Create the necessary directories for Organizer files.
- Copy Organizer program files to the file server.
- Add an icon to the Windows Program group you select.

Before you run Install

Be sure you have the following:

- The disks that came in your package.
- A minimum of 10MB of free disk space on the network file server to store Organizer program files. In addition, you need 2MB of disk space for the additional temporary files that Install requires to perform its installation operation. (Install deletes these temporary files automatically when installation is completed.) Install shows you the amount of disk space you need for the program files, as well as the amount of disk space you currently have available on each drive.

Using Install Help

Install consists of a series of dialog boxes that are generally self-explanatory. If you need more information about the installation instructions, use Install Help. You get Help by clicking the Help button in the current dialog box or pressing **ALT+H**.

Running Install

You must run Install using Windows 3.1 or later, running with MS-DOS 5.0 or later.

Note This procedure assumes you are starting Install from a high-density A drive. If you run Install from a different drive, substitute the letter of that drive in this procedure.

1. Log in to the network with full access rights and connect to the file server on which you want to install Organizer.
2. Insert the Install disk in drive A and close the drive door.

3. Open the Windows Program Manager and choose File - Run.
4. Type a:install in the Command Line text box and click OK.
5. Enter your company name, select Install on a file server, and click Next.

   If you leave your name blank, users enter their names during a node installation, but the company name remains the same for all users.

   Note If you're installing Organizer on a stand-alone workstation, make sure the Install on a file server checkbox is *not checked*.
6. Click Yes to confirm the name you entered in step 5.
7. Select the type of installation, and then click Next.

   For a file server installation, the default drive and directory is C:\LOTUS\ORG2.

   For a network distribution installation, the default drive and directory is \LOTUSDIS\ORG2.
8. Select the drive where you want to copy the program files from the Drive list box, and specify the name of the Organizer program directory.
9. Select the drive where you want to copy files in the Lotus shared tools directory, specify the name of the Lotus shared tools directory, and then click Next.

   (The default drive and directory is C:\LOTUS\LOTUSAPP. If you have other Lotus applications installed on the file server, Lotus recommends that you select the same shared tools directory used by the other Lotus applications.)
10. Deselect the Enable group scheduling features checkbox if it is selected.
11. Follow the remaining instructions that appear on the screen.

After you install Organizer on the file server, create a shared data directory on the network for users' Organizer files.

Installing Organizer with shared calendaring and no group scheduling on users' workstations

Users install Organizer program files using one of three methods.

- Install from a network distribution directory.
- Install with Node Install.
- Install with disks that came in their packages.

Refer users to Chapter 1 in *Exploring Organizer* for instructions on installing Organizer from disks.

Note If a user plans to use Notes for group scheduling, Notes must appear in the PATH statement in the AUTOEXEC.BAT file of the workstation where Organizer is being installed.

Installing Organizer from a network distribution directory

The following list contains the information you should supply to your users when they install Organizer from a network distribution directory:

- The drive letter and name of the program directory where you installed Organizer (for example, M:\LOTUSDIS\ORG2)
- Directions for starting Organizer

Refer users to Chapter 1 in *Exploring Organizer* for instructions on starting Organizer.

Running Install from a network distribution directory

1. Log in to the network and connect to the file server on which your administrator installed Organizer.
2. Start Windows.
3. Display the Program Manager window.
4. Choose File - Run.
5. Enter the drive letter and name of the network directory where your administrator installed Organizer, followed by the name of the Install program (for example, M:\LOTUSDIS\ORG2\INSTALL.EXE), and click OK.
6. Enter your name and company name and click Next.
7. Click Yes to confirm the names entered in step 6.
8. Select what Organizer files to install on your hard disk.
9. Select the drive where you want to copy the files, specify the name of the Organizer program directory, and click Next.
10. Follow the remaining instructions that appear on the screen.

Installing Organizer with Node Install

The following list contains the information you should supply to your users when they install with Node Install:

- The drive letter and name of the program directory where you installed Organizer (for example, M:\LOTUS\ORG2)
- Directions for starting Organizer

Refer users to Chapter 1 in *Exploring Organizer* for instructions on starting Organizer.

Running Node Install

1. Log in to the network and connect to the file server on which your administrator installed Organizer.
2. Start Windows.
3. Choose File - Run.
4. Enter the drive letter and name of the network directory where your administrator installed Organizer, followed by the name of the Install program (for example, M:\LOTUS\ORG2\INSTALL.EXE), and click OK.
5. Enter your name and click Next.
6. Click Yes to confirm the name entered in step 5.
7. Select the drive where you want to copy the Organizer files, specify the name of the Organizer program directory, and click Next.
8. Select the Organizer files you want to install on your hard disk.

Follow the remaining instructions that appear on the screen.

Chapter 4
Managing Organizer Mail-Based Scheduling Files

This chapter includes procedures for using Lotus Organizer Administration 2.1 to create, configure, and maintain Organizer mail-based scheduling files. It provides information on the ORG2.INI file and procedures for changing its initialization (.INI) entries.

An overview of Lotus Organizer Administration 2.1

Lotus Organizer Administration 2.1 is a Microsoft Windows application for maintaining Organizer group-scheduling files. When you use mail-based scheduling with Notes, scheduling information for Organizer is stored in unique Organizer fields in Person documents in the public Notes Name & Address Book. When you use mail-based scheduling with cc:Mail, scheduling information for Organizer is stored in the Comments field in cc:Mail directory entries.

Note See Chapter 5 for how to manage Organizer single-server scheduling files using Lotus Organizer Administration 2.1.

Lotus Organizer Administration 2.1 lets you do the following:

- Display Organizer field values associated with directory entries for Organizer users, rooms, resources, file servers, and scheduling agents.
- Select a single entry or multiple entries.
- Selecting entries that match specific criteria.
- Create Organizer entries for users, rooms, resources, file servers, and scheduling agents (cc:Mail).
- Create Organizer entries for rooms, resources, and file servers (Notes). (You *must* use Notes *first* to register users and scheduling agents as new users on the Notes server.)
- Edit and delete entries for users, rooms, and resources.
- Reset a password on a user's Organizer file.
- Display errors and informational messages on the screen, in a log file, or both.

- Display Help based on the task you're doing.
- Assign access levels to Organizer files.
- Compact Organizer files.

Managing Organizer information in the cc:Mail directory

The following general steps describe how to manage Organizer information in the cc:Mail directory. Refer to the sections in parentheses for detailed information.

Use Lotus Organizer Administration 2.1 to

- Create entries for any new Organizer users, rooms, resources, file servers, and scheduling agents not listed in the cc:Mail directory. (See individual sections on creating entries later in this chapter.)
- Select entries in the cc:Mail directory. (See "Selecting and deselecting entries," later in this chapter.)
- Edit the directory entries to add the information Organizer needs for group scheduling. (See "Editing entries," later in this chapter.)

Managing Organizer information in a Notes Name & Address Book

The following general steps describe how to manage Organizer information in a Notes Name & Address Book. Refer to the sections in parentheses for detailed information.

First use Notes to register new Notes Organizer users and scheduling agents who are not listed in the Notes Name & Address Book. The certification process creates a mail file, an .ID file, and a Person document for the new users and scheduling agents. See the Lotus Notes administrator's guide for more information on registering new users.

Then use Lotus Organizer Administration 2.1 to

- Select the user and scheduling-agent entries in the Notes Name & Address Book and edit them to add the information Organizer needs for group scheduling. (See "Selecting and deselecting entries," and "Editing entries," later in this chapter.)
- Create Notes Name & Address Book entries for Organizer rooms, resources, and file servers in the Notes Name & Address Book. (See individual sections on creating entries later in this chapter.)

Starting and ending Lotus Organizer Administration 2.1

Use the following procedures to start and end Lotus Organizer Administration 2.1.

Note You *must* complete a file server installation followed by a Node Install on the *same* system before starting Lotus Organizer Administration 2.1.

Starting Lotus Organizer Administration 2.1

1. Start Windows and display the Program Manager window.
2. If necessary, open the group window that contains the Lotus Organizer Administration 2.1 program icon.

3. Double-click the Lotus Organizer Administration 2.1 program icon.

Ending Lotus Organizer Administration 2.1

Choose File - Exit or press **ALT+F4**.

Using Help

Lotus Organizer Administration 2.1 provides Help based on the task you're doing. For example, if you're using the Edit Selected dialog box, you can display a Help topic about editing entries.

To get Help on any dialog box, click the Help button in the dialog box.

To get Help at any time, press **F1**.

To print the current Help topic, click the Print icon at the top of the topic's Help window.

To display a list of topics related to the current topic, click the Related Topics icon at the top of the topic's Help window. You can display a topic in the list by selecting it, or you can return to the Help Contents window.

You can also display Help topics that relate to a keyword or phrase you enter. Choose Help - Search and click Help for instructions.

Logging in and out of Lotus Organizer Administration 2.1

When you start Lotus Organizer Administration 2.1, the program displays the dialog box that you use to log in to your mail system (Notes or cc:Mail). Without a successful login, Lotus Organizer Administration 2.1 cannot access the Notes Name & Address Book or the cc:Mail directory.

Logging in to a Notes Name & Address Book

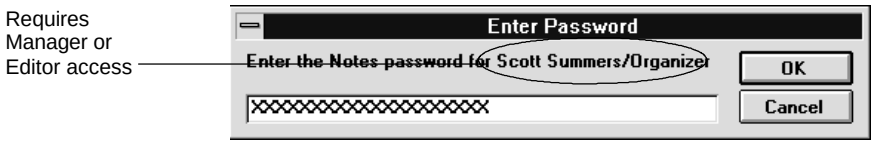
Notes administrators who use Lotus Organizer Administration 2.1 must have Manager or Editor access to the public Notes Name & Address Book to edit entries. If you only have Editor access to the Notes Name & Address Book, you must use a text editor to add the AdminGroup entry to the [Org Admin] section of the ORG2.INI file. See "Maintaining the ORG2.INI file," later in this chapter, for more information.

1. Start Lotus Organizer Administration 2.1.
2. Enter the password the Notes ID file requires in the text box.

Note If the Notes administrator's ID does not contain a password, Lotus Organizer Administration 2.1 will not prompt you for it.

3. Click OK.

   The following illustration shows a completed Enter Password dialog box:



Logging in as a cc:Mail post office

Note cc:Mail administrators who use Lotus Organizer Administration 2.1 must log in as the cc:Mail post office and enter its password to edit entries in the cc:Mail directory. You may log in using your name, but you will then only be able to view (and not edit) entries.

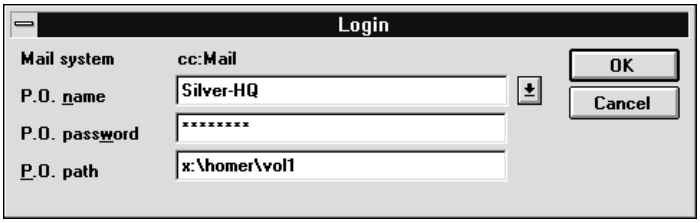
1. Start Lotus Organizer Administration 2.1.

   Lotus Organizer Administration 2.1 displays the Login dialog box and obtains default information from the [cc:Mail] section of the WIN.INI file.

2. (Optional) If the post office name is incorrect, enter another post office name, or select another name from the P.O. name list box. If the path to the cc:Mail post office is incorrect, enter the correct information in the P.O. path text box.

3. Enter the password for the cc:Mail post office.
4. Click OK.

The following illustration shows a completed Login dialog box:



Logging in as a different cc:Mail post office

When you successfully log in, Lotus Organizer Administration 2.1 displays the entries for the cc:Mail post office. While you can use only one cc:Mail directory for each login, you don't need to exit Lotus Organizer Administration 2.1 to log in as a different cc:Mail post office. You can use a different login.

1. Choose File - Logout to close the current cc:Mail directory.
2. Choose File - Login.
3. Enter the name, password, and path for the new cc:Mail post office.
4. Click OK.

   Lotus Organizer Administration 2.1 displays entries for the new cc:Mail post office.

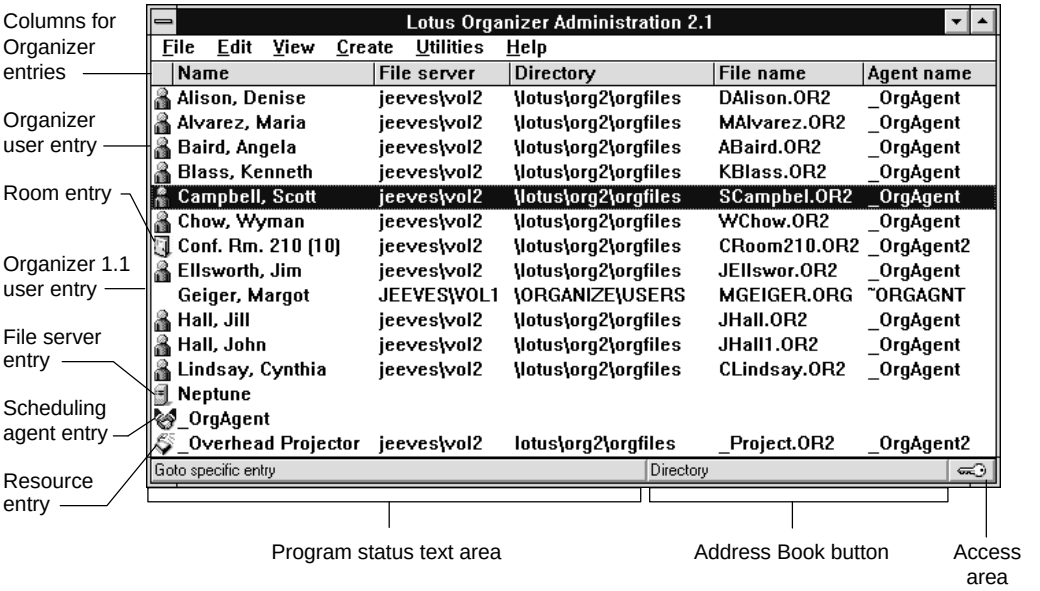
Logging out

Choose File - Logout.

The Lotus Organizer Administration 2.1 window

When you successfully log in, Lotus Organizer Administration 2.1 displays the window below. The Lotus Organizer Administration 2.1 window displays entries it receives from an existing Notes Name & Address Book or cc:Mail directory, along with any Organizer scheduling information currently associated with the entries. All entries are displayed as they are received from the Notes Name & Address Book or cc:Mail directory.

The following illustration displays an example of the Lotus Organizer Administration 2.1 window after you successfully log in to a cc:Mail post office and go to a user entry:



Columns for Organizer entries

The Lotus Organizer Administration 2.1 window arranges data for Organizer entries in columns. The columns contain either user-specific or server-specific data. See “Using views,” later in this chapter, for details on how information is displayed.

Resizing columns

When a column is too narrow to display an entire field, Lotus Organizer Administration 2.1 displays only the part of the field that fits in the column where it is entered. To give more room for data in a column, you can widen the column.

Note All columns but the icon column are resizable.

1. Move the mouse pointer to the right border of the column name.

   The mouse pointer changes to a black two-headed horizontal arrow.

2. Drag the pointer to the right until the column is the width you want.

Icons

Each Organizer entry type in the Lotus Organizer Administration 2.1 window has an icon associated with it. The exceptions are Organizer Release 1.1 users, remote Organizer users, and new Organizer users you created with Notes or cc:Mail ADMIN, which do not have icons associated with them until you edit their entries. See “Editing entries,” later in this chapter, for more information.

The following table summarizes the icons:

Icon	*Description*
	A user with an Organizer file for group scheduling
	An Organizer file set up as a room
	An Organizer file set up as a resource
	A file server
	A Lotus Organizer Scheduling Agent 2.1
	A volume alias (Lotus Organizer Scheduling for the Macintosh Release 1.1 entries only)

Status bar

Consists of the following areas and a button that display information about the Lotus Organizer Administration 2.1 window:

- Program status text area that displays notification of a successful login, the current view, and prompts for using menus and commands
- Address Book button that lists the Notes Name & Address Book or the cc:Mail directory
- Access area displays either to indicate read-write access to the Notes Name & Address Book or the cc:Mail directory; or to indicate read-only access

Selecting and deselecting entries

Before you can work with an entry, you must select it. You can select entries in only one Notes Name & Address Book or one cc:Mail directory at a time. When you select an entry in the Lotus Organizer Administration 2.1 window, the entry is highlighted. You can perform the following tasks:

- Select a single entry.
- Select multiple entries.
- Deselect a single entry or multiple entries.

- Select entries that match specific criteria.
- Select specific Notes entries.
- Select specific cc:Mail entries.
- Go to a single entry.

Selecting a single entry

In the Lotus Organizer Administration 2.1 window, you can select a single entry and then use Lotus Organizer Administration 2.1 commands to work with it.

With the left mouse button, click the entry you want to select.

In addition, you can use the following keys to select an entry:

Press	*To select*
↑ or ↓	An entry above or below the current selection
END	The last entry in the list of entries
HOME	The first entry in the list of entries
PG UP	The entry at the top of the current window
PG DN	The entry at the bottom of the current window

Selecting multiple entries

You can select more than one entry at a time in order to perform a task with multiple entries at one time. You can select entries that appear in sequence or out of sequence.

To select multiple entries in sequence

1. Click the first entry you want to select.
2. Drag to the last entry you want to select.

Tip You can also click the first entry and press and hold **SHIFT** while you click the last entry you want to select.

To select multiple entries out of sequence, press and hold **CTRL** while you click each entry.

Deselecting a single entry or multiple entries

When you deselect an entry in the Lotus Organizer Administration 2.1 window, Lotus Organizer Administration 2.1 removes the highlight from the entry.

To deselect a single entry, select another entry.

To deselect multiple entries, press and hold **CTRL** while you click each entry.

To deselect all entries, choose Edit - Deselect All.

Selecting entries that match specific criteria

Selecting entries that match criteria you specify is useful when you want to perform one task on multiple entries at a time. For example, you may want to select multiple Organizer users on a file server and change the name of their scheduling agent.

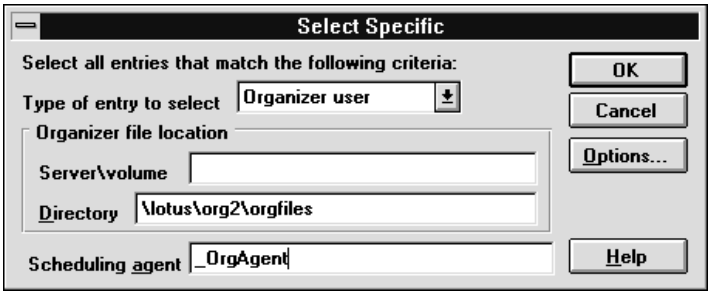
1. Choose Edit - Select Specific.
2. Select the type of entry.
3. Enter the desired information in the Select Specific dialog box.

   For example, you could select all entries that have a specific scheduling agent by entering its name in the Scheduling agent text box.

   Note If you leave a text box blank, Lotus Organizer Administration 2.1 will not use it in the search.
4. Click OK.

   When you click OK, Lotus Organizer Administration 2.1 deselects all current selections and selects all entries that meet the desired criteria. Depending on the size of the Notes Name & Address Book or cc:Mail directory, this could be a lengthy operation.

The following illustration shows a completed dialog box for selecting Organizer users with a specific directory and scheduling agent:



The following table describes the options in the Select Specific dialog box:

Option	*Result*
Type of entry to select	Lets you limit the search to a specific type of Organizer entry.
Server\volume	Restricts the search to entries whose Organizer files are on the specified file server and volume.
Directory	Restricts the search to entries whose Organizer files have the specified directory.
Scheduling agent	Lets you specify the name of the scheduling agent for the specified entries.

Note Lotus Organizer Administration 2.1 displays "Server\volume" for Novell NetWare and "Server\resource" for LAN Manager and MS-Net compatible networks in the Organizer file location list box.

You can also use the Select Specific dialog box to select all users that match specific criteria, deselect the entries you don't want to work with, and then edit the information for the remaining entries. For more information, see "Editing entries," later in this chapter.

Selecting specific Notes Organizer entries

If you have a large Notes Name & Address Book, you can use the Select Specific Options dialog box to select Organizer entries that reside on a specific Notes server—the users' home server.

1. Choose Edit - Select Specific.
2. Click Options.
3. Enter the name of the Notes server.
4. Click OK.
5. Click OK.

Lotus Organizer Administration 2.1 deselects all current selections and selects all entries on the specified Notes server.

The following illustration shows a completed dialog box for selecting Organizer entries on a specific Notes server:

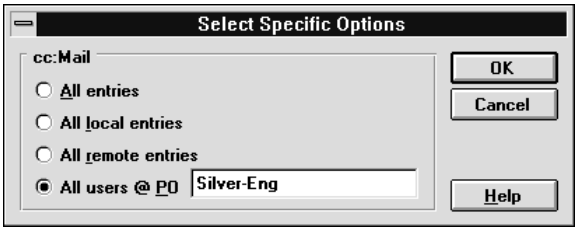
Selecting specific cc:Mail Organizer entries

If you have a large cc:Mail directory you can use the Select Specific Options dialog box to select all cc:Mail Organizer entries, all local entries, all remote entries, or all users at a specific cc:Mail post office.

1. Choose Edit - Select Specific.
2. Click Options.
3. Select the type of cc:Mail Organizer entries.
4. Click OK.
5. Click OK.

Lotus Organizer Administration 2.1 deselects all current selections and selects all entries at the specified cc:Mail post office.

The following illustration shows a completed dialog box for selecting all Organizer users on a specific cc:Mail post office:



Going to a single entry

1. Choose Edit - Go To.
2. Enter the first letter or few letters of the entry you want to go to (for example, if you enter lind and click OK, Lotus Organizer Administration 2.1 goes to the first Organizer entry whose name begins with these four letters).
3. Click OK.

Tip You can also go to an entry by entering the sequence of characters quickly in the Lotus Organizer Administration 2.1 window.

Using views

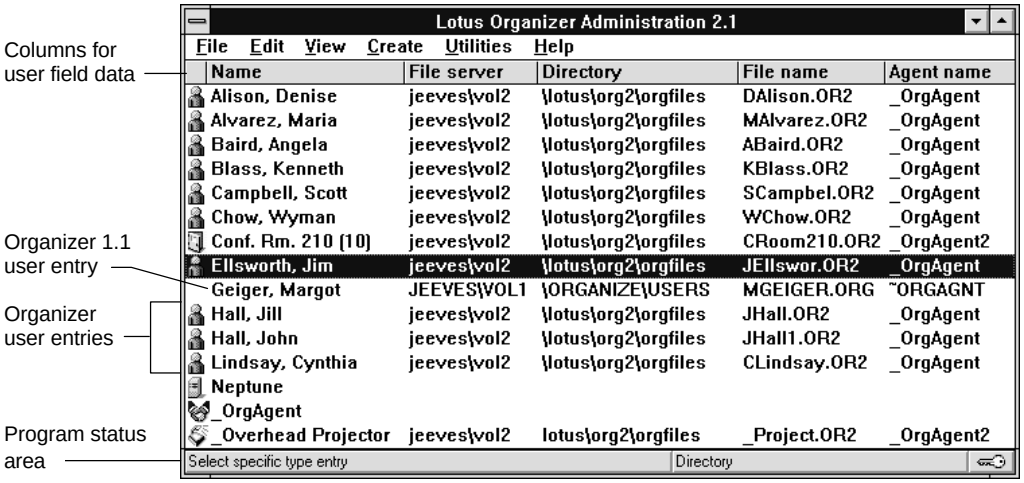
The Lotus Organizer Administration 2.1 window has two views—user fields and server fields. You use the View menu to switch views and display user-specific or server-specific data for Organizer entries. (Scheduling agent entries have no Organizer information.) The Program

status text area in the status bar tells you the current view after you've selected one.

Using the User Fields view

When you choose View - User Fields, Lotus Organizer Administration 2.1 displays the User Fields view. File server and scheduling agent entries have icons but don't display any scheduling information in the User Fields view.

An example of a User Fields view after logging into a cc:Mail post office and selecting a user entry appears in the following illustration:



Note Organizer Release 1.1 users display scheduling information but don't have icons. New Organizer users you created with Notes or cc:Mail ADMIN do not have icons associated with them until you edit their entries. (See "Editing entries," later in this chapter, for information on how to create the .OR2 file and add the user icon to these entries.)

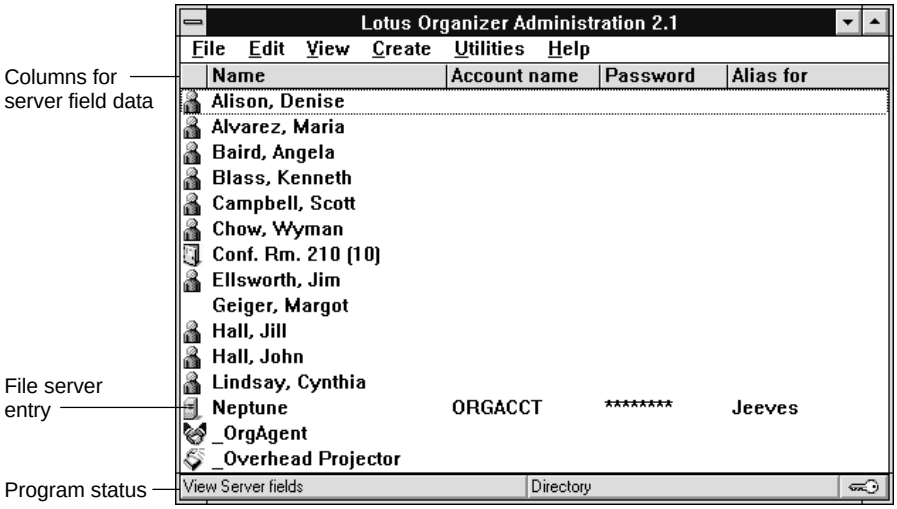
The User Fields view displays data for user entries in these columns.

Column	*Displays*
Name	Name of the entry (user, room, resource, file server, or scheduling agent)
File server	The file server name and volume name associated with the Organizer file
Directory	The directory within which the entry's Organizer file is stored
File name	The entry's Organizer file name
Agent name	The scheduling agent for this entry

Using the Server Fields view

When you choose View - Server Fields, Lotus Organizer Administration 2.1 displays the Server Fields view. Names for all entries appear in this view but Lotus Organizer Administration 2.1 only displays data for file server entries in the Account name and Password columns. Data appears in the Alias for column if you entered an alias for the file server in the Server Information dialog box.

An example of a Server Fields view after logging into a cc:Mail post office appears in the following illustration:



The Server Fields view displays data for file server entries in these columns.

Column	*Displays*
Name	The name of the file server entry
Account name	The network account name that Organizer uses to access Organizer files stored on the named file server
Password	The password for the network account on the named file server. Lotus Organizer Administration 2.1 displays each character of the password with an * (asterisk). Network accounts that don't use passwords have a blank Password column.
Alias for	An additional name for a file server if the file server name is already used by a user, room, or resource. (Alias for avoids duplicate names in the Notes Name & Address Book or cc:Mail post office.)

Naming Organizer files

When you create an Organizer entry for a user, room, or resource, Lotus Organizer Administration 2.1 provides these methods for naming the Organizer (.OR2) file.

- First initial and last name
- First name and last name
- Specific name you enter

Lotus Organizer Administration 2.1 uses an algorithm to guarantee unique Organizer file names in each Notes Name & Address Book or cc:Mail directory. By default, Lotus Organizer Administration 2.1 uses first initial and last name when it first creates the .OR2 file name. For example, Daniel Rosa's Organizer file would be DRosa.OR2 by default.

If you later add an Organizer user whose first initial and last name already exist in the Notes Name & Address Book or cc:Mail directory, Lotus Organizer Administration 2.1 appends *n* to the existing file name, where *n* is a number starting with 1. (*n* increases in increments of 1.) For example, after Daniel Rosa's file (DRosa.OR2) is created, Dorothy Rosa's .OR2 file name would be DRosa1.OR2, David Rosa's .OR2 file name would be DRosa2.OR2, and so on.

When generating unique file names, Lotus Organizer Administration 2.1 may convert certain characters that are not valid MS-DOS file name characters (for the current code page in use) to similar characters or to the _ (underscore). If you don't like the name Lotus Organizer Administration 2.1 generates, use the Specific option in the Edit Selected dialog box to rename the .OR2 file. Remember, .OR2 file names must be unique in the specified directory.

When you select first name and last name, Lotus Organizer Administration 2.1 uses as many characters in the first name as it can, followed by as many characters in the last name until it reaches the DOS eight-character limit for file names. With this naming scheme, Judy Hersh's .OR2 file name would be JudyHers.OR2, Timothy Wood's .OR2 file name would be TimothyW.OR2, and Caroline Rosa's .OR2 file name would be Caroline.OR2.

If the .OR2 file name can't fit within the DOS, eight-character file name limit, Lotus Organizer Administration 2.1 truncates characters from the name when it creates the .OR2 file name. For example, Mike Greenwood's .OR2 file name would be MGreenwo.OR2. If necessary, the .OR2 name is further truncated to guarantee unique .OR2 file names. For example, Marcia Greenwood's .OR2 file name would be MGreenw1.OR2, Martin Greenwood's .OR2 file name would be MGreenw2.OR2, and so on.

When you enter a specific name for the .OR2 file, you are restricted only by DOS file-naming conventions and the .OR2 names in the current Notes Name & Address Book or cc:Mail directory.

Creating an entry for a cc:Mail Organizer user

1. Choose Create - Organizer User.

   Lotus Organizer Administration 2.1 displays Organizer User in the Organizer entry type drop-down box.

2. Enter the name of the user in the User name text box.

   (For example, if your cc:Mail post office uses the format “last name, first name” enter Crow, Erin).

3. Enter the required data in the Server\volume text box and the Directory text box for this user.

   For static connections, the Server\volume text box is blank and you *must* include a drive letter in the Directory text box.

   For dynamic connections, enter data in *both* the Server\volume and Directory text boxes. *Don’t* include a drive letter in the Directory text box unless your users work across different network operating systems.

4. Select a method for naming the user’s Organizer file or enter a specific Organizer file name (for example, ERINC.OR2).

   Lotus Organizer Administration 2.1 uses the default (first initial and last name) when naming Organizer files.

5. Select Create scheduling file if it is not selected.

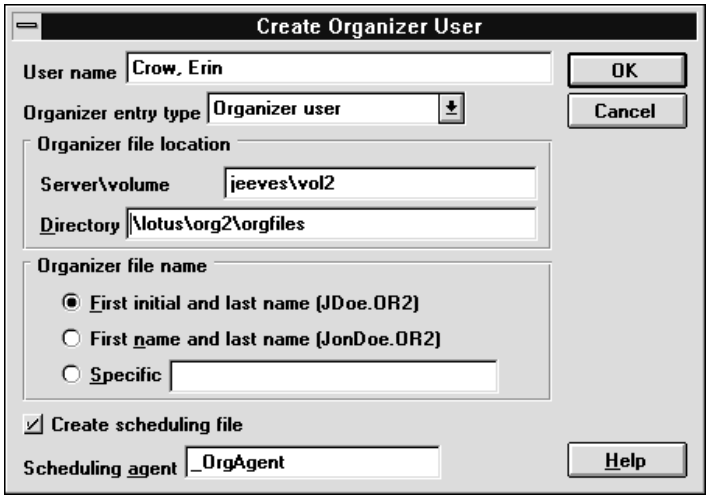
   Tip If you are upgrading an Organizer Release 1.x or Release 2 PIM user to a group-scheduling user, deselect Create scheduling file to guarantee that Lotus Organizer Administration 2.1 reserves a unique file name for this user. When the user tries to open Organizer PIM files, Organizer displays a dialog box asking whether or not to convert the file to an .OR2 file.

6. Enter the name of the scheduling agent for this user (for example, _OrgAgent).

   If you're using Notes with distinguished names, refer to the scheduling agent with its full distinguished name.

7. Click OK.

The following illustration shows a completed entry for a new cc:Mail Organizer user:



Note The new user is added as an uppercase "L" directory entry because you added the local user to the cc:Mail post office.

Adding scheduling information for multiple existing cc:Mail users

If the directory entries already exist in the cc:Mail directory, you can use Lotus Organizer Administration 2.1 to add scheduling information for multiple cc:Mail users at one time.

1. Use the Select Specific Options dialog box to select local or remote cc:Mail entries, or all users at a specific cc:Mail post office.
2. Deselect entries that you don't want to work with.
3. Use the Edit Selected dialog box to add the Organizer scheduling information for the remaining entries. (For more information, see "Editing entries," later in this chapter.)

Creating an entry for an Organizer room

Organizer 2.x has different entry types for rooms and resources. Rooms in Organizer 2.x are meeting or conference rooms. In Organizer 1.1, there was only one entry type for rooms and resources.

1. Choose Create - Room.

   Lotus Organizer Administration 2.1 displays Room in the Organizer entry type drop-down box.

2. Enter the name of the new room in the User name text box.

   Tip When naming rooms, enter the conference room number, followed by its capacity in parentheses: for example, Conf. Rm. 109 (10).

3. Enter the required data in the Server\volume text box and the Directory text box for this room.

   For static connections, the Server\volume text box is blank and you *must* include a drive letter in the Directory text box.

   For dynamic connections, enter data in *both* the Server\volume and Directory text boxes. *Don't* include a drive letter in the Directory text box unless your users work across different network operating systems.

4. Select a method for naming the room's Organizer file or enter a specific Organizer file name (for example, CRoom109.OR2).

   In this example, the default .OR2 file name is C(10).OR2.

   Tip When naming a room that will be used by both Organizer 1.1 and Organizer 2.x users, set up the room in Organizer 1.1 (with the DIRADMIN utility) so that an Organizer 1.1 (.ORG) file is created. Creating an .ORG file enables both Organizer 1.1 and 2.1 users to display the room's free and busy times for group scheduling.

5. Select Create scheduling file if it is not selected.

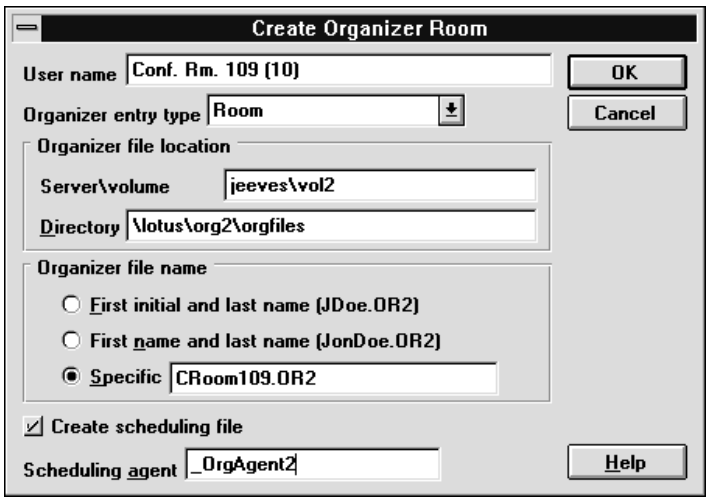
   Tip If you are upgrading an Organizer Release 1.1 resource for a conference room to an Organizer Release 2.x room, deselect Create scheduling file to guarantee that Lotus Organizer Administration 2.1 reserves a unique file name for this room. Then you must start the Organizer client and convert the .ORG file for this room to an .OR2 file.

6. Enter the name of the scheduling agent for this room (for example, _OrgAgent2).

   If you're using Notes with distinguished names, refer to the scheduling agent with its full distinguished name.

7. Click OK.

The following illustration shows a completed entry for a new room:



Tip After creating a room entry, you may wish to edit its User Access List to give the room administrator special access to the Organizer file. See "Assigning access levels to an Organizer file," later in this chapter.

Administering rooms

You use Lotus Organizer Administration 2.1 to create entries for rooms. When users schedule meetings, the room entries appear in the Room drop-down box in the Schedule Meeting dialog box. In order for the room entries to be displayed, you must create a public mailing list (cc:Mail) or group (Notes) that contains these entries.

In cc:Mail, use cc:Mail ADMIN to create a public mailing list named "#*ROOMS". In Notes, you should create a group named "*ROOMS". For more information on creating public mailing lists, see cc:Mail administrator's guide. For more information on creating groups, see the Lotus Notes administrator's guide.

Creating an entry for an Organizer resource

Organizer 2.x has different entry types for rooms and resources. Resources in Organizer 2.x are items like company vehicles, computers, and audio visual equipment. In Organizer 1.1, there was only one entry type for rooms and resources.

1. Choose Create - Resource.

   Lotus Organizer Administration 2.1 displays Resource in the Organizer entry type drop-down box.

2. Enter the name of the new resource in the User name text box.

   Tip When naming resources, enter _ (underscore) to sort them together at the bottom of the Notes Name & Address Book or cc:Mail directory. For example, _Overhead Projector.

3. Enter the required data in the Server\volume text box and the Directory text box for this resource.

   For static connections, the Server\volume text box is blank and you *must* include a drive letter in the Directory text box.

   For dynamic connections, enter data in *both* the Server\volume and Directory text boxes. *Don't* include a drive letter in the Directory text box unless your users work across different network operating systems.

4. Select a method for naming the resource's Organizer file or enter a specific Organizer file name.

   In this example, the default .OR2 file name is _Project.OR2.

   Tip When naming a resource that will be used by both Organizer 1.1 and Organizer 2.x users, set up the resource in Organizer 1.1 (with the DIRADMIN utility) so that an Organizer 1.1 (.ORG) file is created. Creating an .ORG file enables both Organizer 1.1 and 2.1 users to display the resource's free and busy times for group scheduling.

5. Select Create scheduling file if it is not selected.

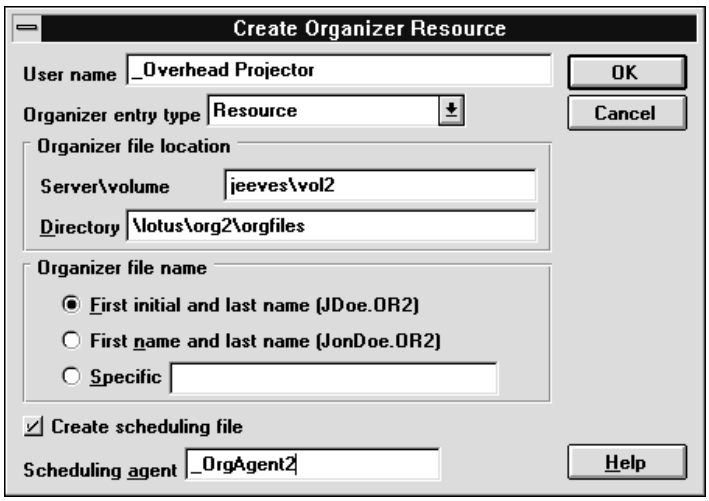
   Tip If you are upgrading an Organizer Release 1.1 resource to an Organizer Release 2.x resource, deselect Create scheduling file to guarantee that Lotus Organizer Administration 2.1 reserves a unique file name for this resource. Then you need to start the Organizer client and convert the .ORG file for this resource to an .OR2 file.

6. Enter the name of the scheduling agent for this resource (for example, _OrgAgent2).

   If you're using Notes with distinguished names, refer to the scheduling agent with its full distinguished name.

7. Click OK.

The following illustration shows a completed entry for a new resource:



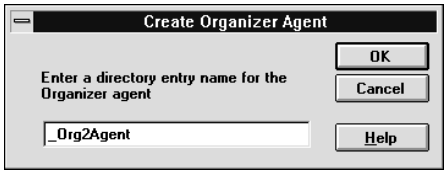
Note After creating a resource entry, you may wish to edit its User Access List to give the resource administrator special access to the Organizer file. See "Assigning access levels to an Organizer file," later in this chapter.

Creating an entry for a Lotus Organizer Scheduling Agent 2.1 for cc:Mail

1. Choose Create - Agent.
2. Enter a name for the new scheduling agent in the text box.

   Note Each scheduling agent must have a *unique* name.
3. Click OK.

The following illustration shows a completed entry for a new cc:Mail Organizer scheduling agent:



Note The new scheduling agent is added as an uppercase "P" directory entry.

Creating an Organizer entry for a file server

You must create an entry for each file server that contain .OR2 files. In order for users to obtain free and busy time for users on remote servers and for a scheduling agent to deliver meeting notices on a remote file server, you must create an entry for each remote file server in the cc:Mail post office or Notes Name & Address Book. To do this, you must tell Organizer how to log in to the remote file server.

1. Create a network account (for example, ORGACCT) on the local and remote file server with the appropriate access rights for your network.

   See "Specifying file server information," in Chapter 3, for details on how to grant access rights to the network account.

   Note If you don't have access rights on the remote file server to create the network account, ask the administrator on the remote file server to complete this procedure.

2. Choose Create - File Server.
3. Enter the name of the remote file server in the Server name text box (for example, Jeeves).
4. Enter the network account name on the remote file server in the User name text box (for example, ORGACCT).
5. Enter the password for the network account on the remote file server in the Password text box (for example, Neptune).

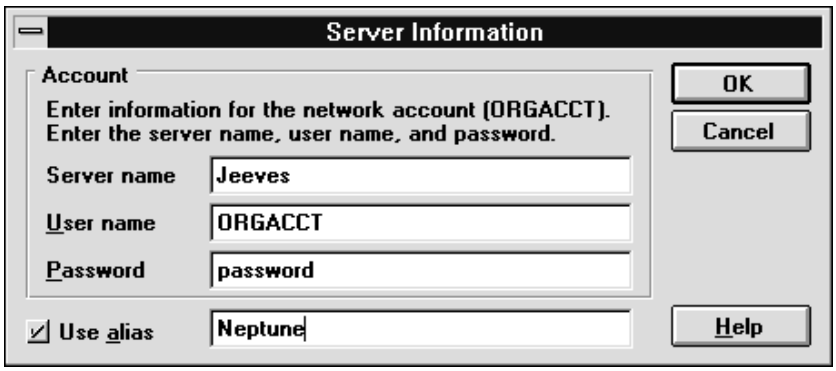
   Note The password appears in the Password text box as you type it. Lotus Organizer Administration 2.1 displays each character of the password with an * (asterisk) in the Server Fields view.

6. (Optional) If the file server name is already used by a user, room, or resource, select Use alias and enter an additional name for the file server.

   Using an alias avoids duplicating names in the Notes Name & Address Book or cc:Mail post office. The alias appears in the Alias for column in the Server Fields view.

7. Click OK.

The following illustration shows a completed entry for a file server:



Note While Organizer is running, it connects the client to the remote file server using the network account. Therefore, the network account should *only* be granted access rights to the \ORG2\ORGFILES subdirectory.

Editing entries

Before you edit an entry, you must select it. (See "Selecting and deselecting entries," earlier in this chapter, for more information.) You can edit a single entry or multiple entries.

The following section demonstrates how to edit an entry for an Organizer user. Use a similar procedure for editing an entry for an Organizer room or resource.

Editing a single entry

1. Double-click the entry you want to edit.

   Tip You can also edit an entry by selecting it and then pressing **ENTER**.

2. Make necessary changes to the Organizer file location, Organizer file name, and/or the name of the scheduling agent in the appropriate text boxes.

   Note When you edit an entry, Lotus Organizer Administration 2.1 uses the Keep previous name option, which is the default, for the Organizer file name.

3. Click OK.

The illustration below shows the following edits for an Organizer user:

- The file server and volume name were changed from jeeves\vol2 to jeeves\vol1
- The scheduling agent was changed from _OrgAgent to _OrgAgent2

If you're using Notes with distinguished names, refer to the scheduling agent with its full distinguished name.

Lotus Organizer Administration 2.1 doesn't let you edit an entry for a file server. To edit this entry type, delete and recreate it.

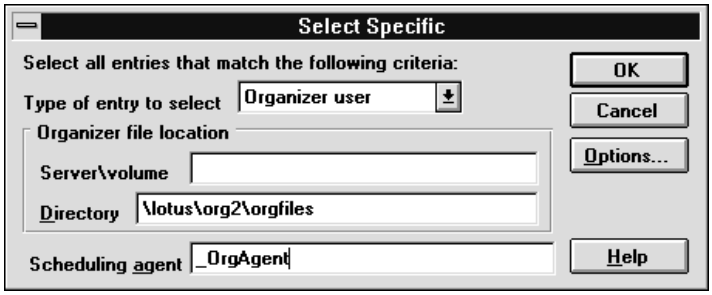
Editing multiple entries

Lotus Organizer Administration 2.1 lets you edit multiple entries at one time that you selected by entering data in the Select Specific dialog box. This feature is useful for tasks that involve a large number of entries. For example, you might want to move only 10 out of 50 users on _OrgAgent to _OrgAgent2.

The next procedure shows how to edit the directory and name of the scheduling agent for multiple Organizer user entries.

1. Choose Edit - Select Specific.
2. Use the Select Specific dialog box to select the entries you want to edit.

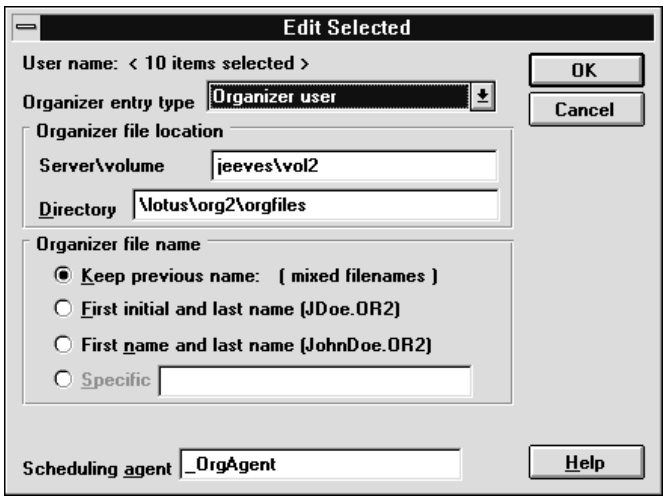
The following illustration shows a completed dialog box for selecting Organizer users with a specific directory and scheduling agent:



3. Click OK.
4. (Optional) Deselect entries in the Lotus Organizer Administration 2.1 window that you don't want to change.
5. Choose Edit - Edit Selected.

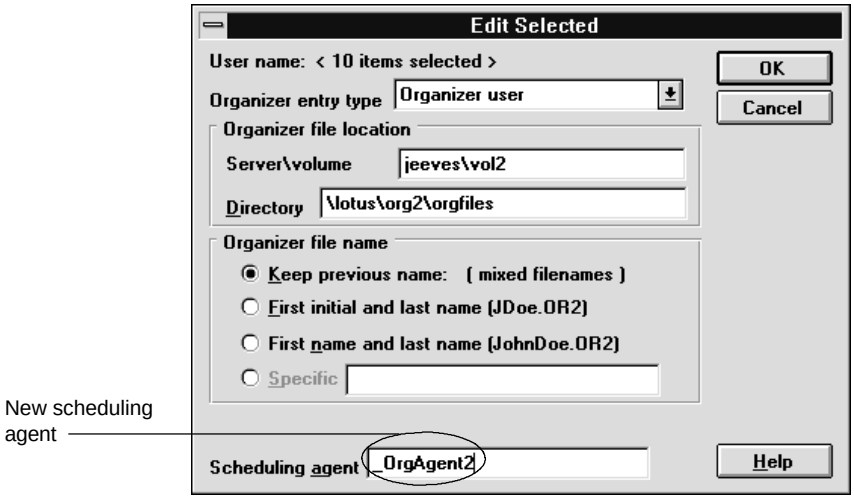
   Lotus Organizer Administration 2.1 displays the number of selected Organizer entries, the entry type (if all the entries are the same Organizer type), and the scheduling information that the entries have in common (Server\volume, Directory, and/or Scheduling agent).

   The following illustration shows the Edit Selected dialog box for the Organizer user entries selected in step 2:



6. Make necessary changes to the directory and scheduling-agent names.
7. Click OK.

The following illustration shows how to edit the name of the scheduling agent from _OrgAgent to _OrgAgent2 for the Organizer user entries in step 5:



Editing an Organizer Release 1.1 entry

1. Double-click the entry you want to edit.
2. Select Organizer user for the Organizer entry type, and in the Organizer file name list box, select Specific and enter a new file name for the user with the file extension .OR2.

   For example, change the entry DALISON.ORG to DALISON.OR2.

   Caution Once you change the user's file name from .ORG to .OR2, the resulting .OR2 file can no longer be used with Organizer Release 1.1.
3. Make necessary changes to the Organizer file location and/or the name of the scheduling agent in the appropriate text boxes.
4. Click OK.

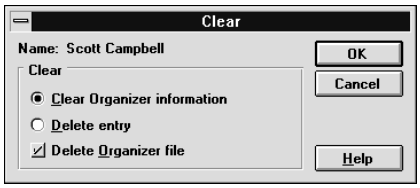
Changing the icon for a Lotus Organizer Scheduling Agent 2.1 Notes entry

1. Double-click the scheduling agent entry whose icon you want to change.
2. Select Agent in the Organizer entry type drop-down box to add the scheduling-agent icon.
3. Click OK.

Clearing Organizer information from a directory entry

When you clear an Organizer entry, Lotus Organizer Administration 2.1 removes the entry's Organizer scheduling information from its Person document in the current Notes Name & Address Book or its Comments field in the cc:Mail directory. Clearing a directory entry does, however, physically retain it. You can also clear multiple entries.

1. Select the entry you want to clear.
2. Choose Edit - Clear.
3. (Optional) The Delete Organizer file option is only available when at least one selected entry has an Organizer file associated with it. If you select this option, the Organizer file for this user is erased from the file server.

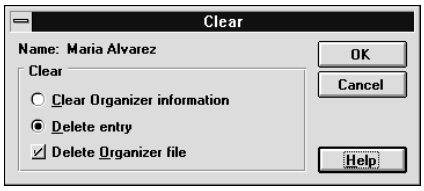


4. Click OK.

Deleting an Organizer entry in the cc:Mail directory

Caution When you delete an Organizer entry, Lotus Organizer Administration 2.1 removes the entry in the cc:Mail directory and you *cannot* retrieve it. You can also delete multiple entries.

1. Select the entry you want to delete.
2. Choose Edit - Clear.
3. Select Delete entry.
4. (Optional) The Delete Organizer file option is only available when at least one selected entry has an Organizer file associated with it. If you select this option, the Organizer file for this user is erased from the file server.



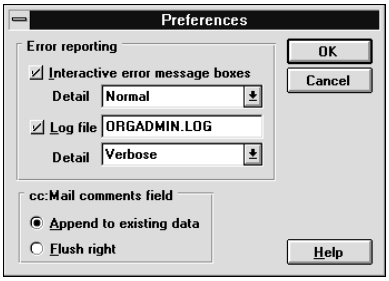
5. Click OK.
6. Click Yes.

Setting preferences

You use the Preferences dialog box to tell Lotus Organizer Administration 2.1 how you want it to report errors and where to write Organizer scheduling information for Organizer files in the Comments field of the cc:Mail directory.

You can display errors and informational messages from Lotus Organizer Administration 2.1 on the screen, in a log file, or both. Lotus Organizer Administration 2.1 creates the default log file, named ORGADMIN.LOG, and places it in the directory from which you're running Lotus Organizer Administration 2.1. You can use a text editor to open the log file and view it.

1. Choose File - Preferences.



2. To display errors and informational messages on the screen, click the Detail drop-down box under Interactive error message boxes and select the type of messages you want displayed: Normal (errors and warnings); Verbose (errors, warnings, and status).
3. To display errors and informational messages in a log file, click the Detail drop-down box under Log file and select the type of messages you want logged: Normal (errors and warnings); Verbose (errors, warnings, and status).

   (Optional) If you select Log file, enter a new name in the text box.
4. (Optional for cc:Mail) Select where you want Lotus Organizer Administration 2.1 to write Organizer scheduling information in the Comments field of the cc:Mail directory.
5. Click OK.

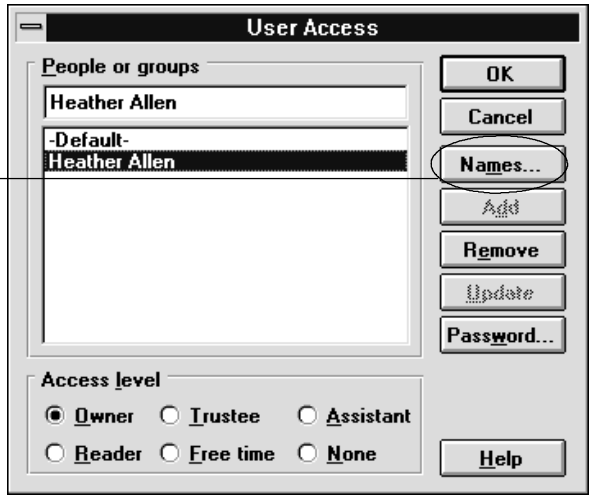
Lotus Organizer Administration 2.1 creates initialization entries for the choices you make in the Preferences dialog box in the [Org Admin] section of the ORG2.INI file. See “Maintaining the ORG2.INI file,” later in this chapter, for more information.

Assigning access levels to an Organizer file

You can assign access levels to Organizer files for anyone on your network. When you use Lotus Organizer Administration 2.1 to create Organizer files for users, the default access level is Free time, which lets other users see only the available time in a user’s Calendar section while using group scheduling. When users open their own files, the files have Owner access.

When you use Lotus Organizer Administration 2.1 to create Organizer files for rooms or resources, the default access level is Reader. You can assign different access levels to rooms and resources.

1. From the Lotus Organizer Administration 2.1 window, select the user entry whose Organizer file access you want to change.
2. Choose Utilities - User Access.
3. Click Names to see a list of the names of other users to whom you can give access rights.



4. Select a name from the list and click Add.

   You can add more than one name.

   Note If you enter a name that appears in more than one location, Organizer displays a dialog box listing each occurrence of the duplicate name and the associated directory, namely, cc:Mail post office, or Notes Name & Address Book. Select the name you want and click OK.

5. Click Close.
6. Under People or groups, select the name of a person you added.
7. Under Access level, select the level of access rights you want to give this user.

   A table of access rights is included after this procedure.

8. Click Update.
9. Repeat steps 6 - 8 for any other user whose name you added.
10. Click OK.
11. Click OK.

Any changes you make to access rights will take effect the next time the Organizer file is opened.

Tip To change the default access for all users, select Default at the top of the list box, select an access level, and click Update.

The following table summarizes Organizer access rights:

Access level	*Access privileges*
Owner	Full access rights, including read, write, customize and free-time access. Owners can access confidential entries, set or change passwords, and set the user access level for other users.
Trustee	In addition to assistant rights, trustees can also customize the file. Trustees can't view or change confidential entries or set the user-access level for other users.
Assistant	Read, write, and free-time access. Assistants can schedule and respond to meetings in your file and change preferences. Assistants can't view or change entries that are confidential or set the user-access level for other users.
Reader	Read only access and free-time access.
Free time	Free-time and busy-time view of a Calendar for group-scheduling purposes; individual appointment details can't be viewed by others.
None	No access to the file.

Resetting a password for a user's Organizer file

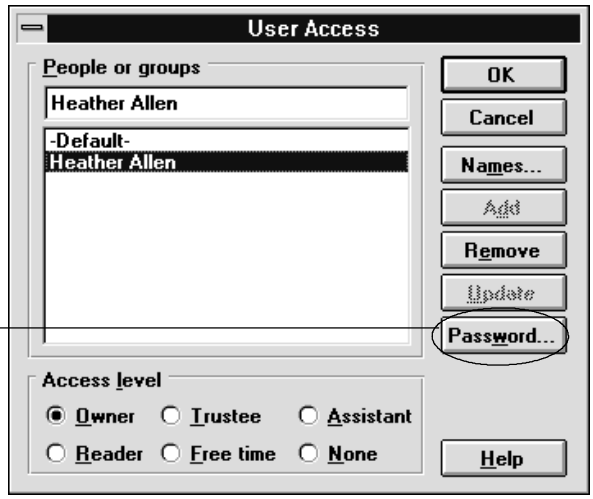
Passwords are only checked when there is no network login to validate the user and permit access to a user's named scheduling file. When users create a password for a file, they must type that password to access the file when they are disconnected from the LAN.

Also, when disconnected from the LAN, any other user to whom they granted access rights must also enter the password to open the file. Refer users to the Organizer client Help file for information on protecting their work with a password.

Note If users take an .OR2 file off the LAN, they may want a password because they don't have a network login to provide security. Organizer 2.1 provides a courtesy dialog as a reminder to users to create and maintain a password on their file.

If a user forgets the password to his or her Organizer file, Lotus Organizer Administration 2.1 lets the administrator reset the password.

1. From the Lotus Organizer Administration 2.1 window, select the user entry whose password you want to reset.
2. Choose Utilities - User Access.
3. Click Password.



4. Enter a password.
5. Click OK.
6. Confirm the password by entering it again.
7. Click OK to confirm the password.

8. Click OK.
9. Inform the user of the new password.

The user must enter the password to open the file. The user can change the password you created with by choosing File - Organizer Preferences - User Access in Organizer. The user should also tell any other user to whom they granted access rights the password, if these users will need to work on the file when they are disconnected from the LAN.

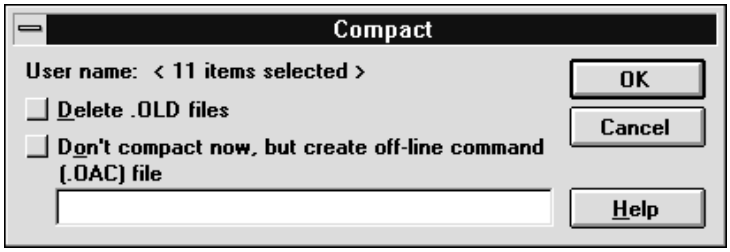
Compacting Organizer files

You should compact Organizer files periodically to reduce their file size. Depending on your users and the size of their .OR2 files, you can choose to compact .OR2 files on a weekly or monthly basis.

You can compact files while you are using Lotus Organizer Administration 2.1, in Batch mode. The following procedures describe both methods for compacting files.

Using Lotus Organizer Compact 2.1

1. From the Lotus Organizer Administration 2.1 window, select the entries whose Organizer files you want to compact.
2. Choose Utilities - Compact.



3. To save the original .OR2 files that Lotus Organizer Administration 2.1 will rename with the extension .OLD, make sure Delete .OLD files isn't selected. To delete .OLD files after compacting for the files is completed, select Delete .OLD files.
4. To compact the selected entries, make sure Don't compact now, but create off-line command (.OAC) file is not selected.
5. Click OK.

As Lotus Organizer Administration 2.1 rebuilds the .OR2 file for each entry, it displays a progress indicator with the compact status for each file.

Using Lotus Organizer Compact 2.1 in Batch mode

Lotus Organizer Administration 2.1 lets you compact Organizer files in Batch mode. You must first create the Organizer command (.OAC) file before you can run it in Batch mode.

1. From the Lotus Organizer Administration 2.1 window, select the entries whose Organizer files you want to compact.
2. Choose Utilities - Compact.
3. To save the original .OR2 files that Lotus Organizer Administration 2.1 will rename with the extension .OLD, make sure Delete .OLD files is not selected. To delete .OLD files after compacting for the files is completed, select Delete .OLD files.
4. To compact the selected entries in Batch mode, select Don't compact now, but create off-line command (.OAC) file.

   By default, Lotus Organizer Administration 2.1 creates the file named COMPACT.OAC and places it in the Organizer \ADMIN directory. You can enter another name for the file in the text box.
5. Click OK.

After you create the .OAC file, you can run it from Program Manager.

6. From Program Manager, create a copy of the Lotus Organizer Administration 2.1 program icon: press and hold **CTRL** while you drag this program icon from its current location to another location in the Lotus Applications group window.
7. Select the copied Lotus Organizer Administration 2.1 program icon and choose File - Properties.
8. Type Batch Compact for the Description.
9. Edit the path to Lotus Organizer Administration 2.1 in the Command Line field by typing a space and the name of the Lotus Organizer Compact 2.1 command file (for example, C:\LOTUS\ORG2\ADMIN\ORGADMIN.EXE COMPACT.OAC)
10. Click OK.
11. Double-click the Batch Compact program icon to compact the specified Lotus Organizer Compact 2.1 command file.

    Lotus Organizer Administration 2.1 compacts the entries according to the options you selected in the Lotus Organizer Compact 2.1 dialog box.

Lotus Organizer Compact 2.1 command file

The Lotus Organizer Compact 2.1 command file is a text file. It may contain the following sections and entries based on login information and options you selected in the Lotus Organizer Compact 2.1 dialog box. The sections and entries in the Lotus Organizer Compact 2.1 command file are included below with a brief description of each one.

[Session] section

LoginContainerPath=*user-defined*
Path to the cc:Mail post office (cc:Mail only).

LoginName=*user-defined*
Name of the cc:Mail post office to log in as (cc:Mail only).

SessionId=*encrypted password*
If the mail system uses a password for your login, SessionId creates an encrypted password.

Commands=1
The number and sequence of commands to execute. Commands must remain set to 1 for Lotus Organizer Administration 2.1. Each command number has a section associated with it. For an example, see "[Command1] section," below.

LoginPassword=*user-defined*
If the mail system doesn't use a password for login, LoginPassword lets you specify a non-encrypted password to gain access to your mail system. Lotus Organizer Administration 2.1 *doesn't* create this entry. You use this entry if you are creating an .OAC file from scratch with a text editor.

[Command1] section

AddressBook=*user-defined*
The Address Book that contains names of Organizer users whose Organizer files Lotus Organizer Administration 2.1 will rebuild. For cc:Mail, the Address Book is the cc:Mail directory.

SelectionList=[Names]
The name of the section in the command file that lists the names of the users whose Organizer files Lotus Organizer Administration 2.1 will compact.

Command=0
The number for a command you want Lotus Organizer Administration 2.1 to execute. Command *must* remain set to 0 for Lotus Organizer Administration 2.1.

DeleteOldFiles=0
Tells Lotus Organizer Administration 2.1 to delete or not to delete all .OLD files after compacting is complete: 0=do not delete all .OLD files; 1=delete all .OLD files.

[Names] section

Individual names of the Organizer users whose Organizer files Lotus Organizer Administration 2.1 will compact. You insert the list of names by selecting their entries in the Lotus Organizer Administration 2.1 window or by entering them in this section yourself with a text editor.

Maintaining the ORG2.INI file

When you complete an Organizer installation, Install copies the ORG2.INI file from the \ORG2\WIN directory on the file server to the Windows program directory on a local drive. The ORG2.INI file contains sections with the default settings for Organizer initialization (.INI) entries. You can change these initialization entries to settings that are specific to your site so that users will use them when they complete a node installation. Users can override any of the site-specific settings by changing initialization entries in the ORG2.INI file on their local drive.

If an initialization entry isn't in the ORG2.INI file, Organizer looks for it in the ORG2NET.INI file. If an initialization entry isn't set in either .INI file, then Organizer uses the default value for the initialization entry.

Note See TECHNOTE.OR2 (in the LOTUS\ORG2\ORGFILES directory) for any additions or changes to the .INI entries that were made after this guide was printed.

[Scheduling] section

TransportProcess=5
Number of meeting notices to read at one time.

CheckNotices=60
How often Organizer checks the local message box for inbound meeting notices (in seconds).

LMEF=0
When the LMEF entry is set to 1, Organizer reads and scans the cc:Mail Foreign Alias Name (FAN) field for abbreviated names for Notes entries so that mail is routed correctly to a Notes user from cc:Mail. When set to 0, Organizer doesn't read or scan the FAN field for abbreviated names.

You must use a text editor to add the LMEF entry manually. If you modify the ORG2.INI file with this entry after you complete a file server install, users will be set up with the proper LMEF support when they complete an Organizer node installation.

See the NDEPLOY.WRI and CDEPLOY.WRI files (in the Organizer \ADMIN directory) for additional information on how Organizer 2.1 works with LMEF Release 3.1 to schedule meetings between Notes users with distinguished names and cc:Mail users and vice versa.

[Agent] section

ContainerPath=*user-defined*
Path to the cc:Mail post office (cc:Mail only).

UserName=*user-defined*
Name of the scheduling agent to log in as (cc:Mail only).

Password=*user-defined*
Password to gain access to mail system (needed for cc:Mail if post office has a password; needed for Notes if Notes ID file used by the scheduling agent has a password).

AgentName=*user-defined*
Name of the scheduling agent within the Notes Name & Address Book (Notes only). When not specified for cc:Mail, ORG2.INI uses the UserName entry.

GatewaySession=1
Tells the scheduling agent where to look for Notes public Name & Address Book(s). If set to 0, the scheduling agent will look on its home server. If set to 1, the scheduling agent will look in its local Notes directory. If you install the scheduling agent as a stand-alone task and not as an add-in server task, set GatewaySession to 0.

PollFrequency=60
Number of seconds to delay before looking for new meeting notices. PollFrequency must be a value of at least 1 (for one second).

RetryFrequency=1800
Number of seconds to delay between retries of failed attempts to process meeting notices.

MaxLogFiles=2
Number of scheduling agent log files to use with the stand-alone scheduling agent. (The add-in server task scheduling agent doesn't use this entry. It only outputs messages to the Notes log file.) 0=Don't use log file.

LogFilesDir=C:
Default directory to place scheduling agent log files (stand-alone scheduling agent only). (The add-in server task scheduling agent doesn't use this entry. It only outputs messages to the Notes log file.)

StatsFrequency=3600
How often (in seconds) Organizer outputs statistics about the scheduling agent's processing of meeting notices to the monitor and the scheduling agent log file. (You can output statistics by choosing File - Statistics in Lotus Organizer Scheduling Agent 2.1 window. Statistics are output automatically when you exit the scheduling agent.)

OutputDetail=2
Controls types of messages displayed or logged: 1-Errors only (Minimal); 2-Errors and warnings (Normal); 3-Errors, warnings, and status (Verbose).

RestartFrequency=3600
How often (in seconds) Lotus Organizer Scheduling Agent 2.1 tries to restart if a network connection is lost (for example, when the network goes down, or the cc:Mail post office is shut down).

ccDownFrequency=3600
How often (in seconds) Lotus Organizer Scheduling Agent 2.1 checks to see if the NPODOWN file is present in the cc:Mail post office directory. Depending on your cc:Mail post office environment and how you configure Lotus Organizer Scheduling Agent 2.1, you may choose to decrease the value for the ccDownFrequency entry.

Mailfile=*user-defined*
Path for Lotus Organizer Scheduling Agent 2.1 for Notes mail file (for example, \MAIL\ORGAGNT.NSF).

[Org Admin] section

Interactive error reporting=TRUE
Tells Lotus Organizer Administration 2.1 whether to display messages on the screen. When set to FALSE, Lotus Organizer Administration 2.1 only writes messages to the log file.

Log error reporting=Orgadmin.log
When the administrator selects Log file in the Preferences dialog box, Lotus Organizer Administration 2.1 writes messages to the named log file.

LastContainerPath=*user-defined*
Path to the last cc:Mail post office used for login.

LastUserName=*user-defined*
Name of the last cc:Mail post office used for login.

LastAddressBook=*user-defined*
Name of the last Notes Name & Address Book used for login.

LogOutputDetail=Normal
Controls types of messages to be logged: Normal (errors and warnings); Verbose (errors, warnings, and status).

DisplayOutputDetail=Verbose
Controls types of messages to be displayed: Normal (errors and warnings); Verbose (errors, warnings, and status).

CommentsFieldFormat=0
Tells Lotus Organizer Administration 2.1 how to write Organizer scheduling information in the Comments field of the cc:Mail directory entry: 0=Right justify Organizer data in the Comments field; 1=Append Organizer data to the existing Comments field.

AdminGroup=*user-defined*
The AdminGroup entry lets an administrator who has Editor access to a Notes Name & Address Book or whose name is not explicitly listed in the ACL for the Notes Name & Address Book use Lotus Organizer Administration 2.1 to edit Organizer information. The administrator must be a member of the group specified by the AdminGroup entry. This group must be listed in the ACL for the Notes Name & Address Book. You must use a text editor to add the AdminGroup entry manually.

Note There may be more entries in the ORG2.INI file if it was opened or changed.

Changing ORG2.INI file initialization entries

You can change the ORG2.INI initialization entries in the following ways:

- Use the Agent Preferences dialog box (modifies scheduling agent initialization entries only)
- Use the Preferences dialog box (modifies Lotus Organizer Administration 2.1 initialization entries only)
- Edit them manually

The ORG2.INI file in the file server's ORG2\WIN directory is for installation purposes only. It is the master ORG2.INI copied to users' local Windows directory when they complete a Node Install. Users should *not* change this file.

Using the Agent Preferences dialog box

You change the scheduling agent's initialization entries by using the Agent Preferences dialog box. The Agent Preferences dialog box is not active while the scheduling agent program is processing or waiting to poll meeting notices because the scheduling agent program and the dialog box both need to access the ORG2.INI file. To change the scheduling agent's initialization entries, you must first pause the scheduling agent program.

1. Switch to the Organizer Scheduling Agent window.
2. Choose File - Pause to pause the scheduling agent.
3. Choose File - Preferences.
4. Make necessary changes to initialization entries in the Agent Preferences dialog box.
5. Click OK.
6. Choose File - Resume to resume a paused scheduling agent.

If you make changes to the initialization entries while the scheduling agent is running, the changes won't take effect until you end or start the scheduling agent again.

Using the Preferences dialog box

You change the initialization entries for Lotus Organizer Administration 2.1 by using the Preferences dialog box. See "Setting preferences," earlier in this chapter, for more information.

Editing ORG2.INI file initialization entries

If you're running Organizer group scheduling using the scheduling agent for Windows, ORG2.INI is a text file. You can use Ami Pro® or a text editor, such as Windows Notepad, to edit it. If you're running Organizer group scheduling using the scheduling agent for OS/2, ORG2.INI is a binary file. You must use a binary editor, such as the INIEDIT utility included on the Scheduling Agent for OS/2 Install Disk, to edit it.

To edit ORG2.INI file initialization entries

1. Log in to the network and connect to the file server on which you installed Organizer.
2. Back up the current ORG2.INI file to another name (for example, ORG2.BAK).
3. Open the ORG2.INI file and make necessary changes to the initialization entries.
4. Save the new ORG2.INI file.

If you're running Organizer, you must exit and restart it for changes to the ORG2.INI initialization entries to take effect.

Guidelines for editing the scheduling agent's initialization entries

If you edit the scheduling agent's initialization entries, keep these points in mind.

- Don't use a thousands separator in initialization entries (for example, use 1800 not 1,800).
- The scheduling agent creates as many log files as specified in the MaxLogFiles entry. The name of the scheduling agent log file is AGENT00n.LOG, where *n* is a number starting with 0. *n* increases in increments of 1 if the AGENT00n.LOG file already exists.
- When the scheduling agent is started, it creates a log file AGENT000.LOG. For that day, the scheduling agent opens AGENT000.LOG and appends text to this file (even if the scheduling agent is exited and restarted). At midnight, the scheduling agent closes AGENT000.LOG and, if the MaxLogFiles entry is set to 2, creates a new file, AGENT001.LOG. This file runs for the day, until midnight when a new AGENT000.LOG file is created, deleting any information saved in this log file one day before. (Setting MaxLogFiles to 1 deletes the scheduling agent log file every night.)

- By default, the scheduling agent for Windows Install configures the scheduling agent log file directory to C:\; the scheduling agent for OS/2 Install configures the scheduling agent log file directory to the drive and directory where the administrator chooses to install the scheduling agent for OS/2 program files.
- The scheduling agent for Windows and scheduling agent for OS/2 add-in server tasks output messages to the Notes log file using the value in the OutputDetail entry.

VIM compatibility

Organizer 2.1 scheduling agents and Organizer 2.1 use Vendor Independent Messaging (VIM) Dynamic Link Libraries (DLLs) to access Notes Name & Address Books or cc:Mail directories. Lotus Organizer Scheduling Agent 2.1 requires different sets of VIM DLLs for OS/2 and Windows. See "System requirements", in Chapter 1 for more information. Users must use the VIM DLLs included with their VIM-enabled applications (for example, Lotus Notes Release 3.1 or later, Notes Express, cc:Mail for Windows Release 2.1, or cc:Mail Mobile for Windows Release 2.1).

Tip You can obtain the cc:Mail VIM DLLs from the cc:Mail Bulletin Board System, CompuServe, or cc:Mail Technical Support.

Organizer looks for VIM in the following order:

- In the current directory
- In the Windows directory
- In the Windows \SYSTEM directory
- In the Organizer program directory
- In directories specified in the PATH statement
- In directories mapped in a network

If users receive VIM or mail engine errors, verify that the latest VIM DLLs are loaded. To avoid problems, make the mail system program directory the first entry in the PATH statement in the AUTOEXEC.BAT file. This ensures that the correct VIM DLLs are always loaded.

The AUTOEXEC.BAT file is a text file. You can use Ami Pro or a text editor, such as Windows Notepad, to edit it. To change the PATH statement in the AUTOEXEC.BAT file

1. Log in to the network and connect to the file server on which you installed Organizer.
2. Change to the root directory (usually C:\).

3. Back up the current AUTOEXEC.BAT file to another name (for example, AUTOEXEC.BAK).
4. Open the AUTOEXEC.BAT file and make sure the mail system program directory (cc:Mail or Notes) appears first in the PATH statement.

   For example, part of the PATH statement might look like this.

   PATH=M:\LOTUS\CCMAIL
5. Save the AUTOEXEC.BAT file.
6. Reboot your system to make the changes to the AUTOEXEC.BAT file take effect.

Note If you receive a newer version of the VIM DLLs, add the directory where they're stored as the first entry in the PATH statement.

Tip VIM is memory-resident. This means if you use a Notes VIM-enabled application and then want to use cc:Mail for routing Organizer scheduling information, you need to exit the Notes VIM-enabled application prior to starting Organizer.

Chapter 5
Using Organizer Single-Server Scheduling

This chapter includes procedures for installing, setting up, and maintaining Organizer group scheduling on a single file server without Notes or cc:Mail.

What is single-server scheduling?

Single-server scheduling uses an existing LAN, a shared message file (MESSAGE.BOX), and a directory services file (ORGNAMES.BOX) to deliver meeting notices. (With mail-based scheduling, a separate scheduling agent processes meeting notices.) Any user on the LAN can schedule meetings with any other user on the network, regardless of location. Meeting notices travel across the LAN. Organizer users who are invited to a meeting receive the notice in their Organizer files.

Components of a single-server Organizer installation

When you use Organizer for single-server scheduling, your Organizer installation consists of the following components on a LAN:

- Organizer program files
- Organizer (.OR2) files
- Organizer initialization (.INI) files
- ORGNAMES.BOX
- Lotus Organizer Administration 2.1
- MESSAGE.BOX

Organizer program files

Users run Organizer on their workstations. As the administrator, you install the Organizer program files on a file server and instruct users how to run the Install program. Users can run Organizer from a file server or from their workstations. Running Organizer from the file server saves space on each user's hard disk and lets you, the administrator, control the Organizer program files on the file server.

Organizer (.OR2) files

Each Organizer user, room, and resource has an Organizer file stored on a file server. Storing users' Organizer files on a file server lets users view and find other people's free and busy times when scheduling a meeting.

Organizer initialization (.INI) files

Organizer stores preference information in two initialization (.INI) files—ORG2.INI and ORG2NET.INI. The Install program creates these text files during installation. The ORG2.INI file can contain sections and initialization entries for group scheduling and user setup. It resides in the Windows program directory on a local drive. See "Maintaining the ORG2.INI file," later in this chapter, for information on changing the initialization entries in this file. ORG2NET.INI is shared among Organizer users and resides in the Organizer program directory on the file server. When Organizer requires an initialization entry, it looks first in ORG2.INI and then, if the initalization entry is not found, it looks in ORG2NET.INI.

The ORGNAMES.BOX file

For single-server scheduling, Organizer maintains directory services information in an Organizer database named ORGNAMES.BOX. By default, this file resides in the shared message box directory (MSGBOX) on the file server. The location of this directory is specified by the MessageBox entry in the [Scheduling] section in the ORG2.INI file. This entry should be the same for all users since this is where the ORGNAMES.BOX file will be placed. If the MessageBox entry points to different directories, shared calendaring and group scheduling won't work.

The Install program creates the ORGNAMES.BOX file. Organizer adds new user entries to the ORGNAMES.BOX file when network users open their Organizer files for the first time. You use the Lotus Organizer Administration 2.1 program to manage Organizer files on the network.

Lotus Organizer Administration 2.1

Lotus Organizer Administration 2.1 is a Microsoft Windows application for maintaining Organizer group scheduling files. See "Managing Organizer single-server scheduling files," later in this chapter, for information on using Lotus Organizer Administration 2.1.

The MESSAGE.BOX file

MESSAGE.BOX is a shared message file used in single-server scheduling that routes meeting notices among Organizer users. The shared message file contains a separate table of inbound and outbound meeting notices for each user. The MESSAGE.BOX file must be located in the same directory as the ORGNAMES.BOX file for shared calendaring and group scheduling to work.

Organizer keeps the MESSAGE.BOX file open for each Organizer user in order to route meeting notices. As a result, the Network Operating System (NOS) limits the number of concurrent Organizer users based on the license version (50, 100, 200, 250, and so on) of the NOS and the ability to support users with the required hardware.

What happens when users schedule meetings?

Organizer lets users choose how they want to process meeting notices, either manually or automatically. With manual processing, the hands in the group scheduling icon shake when the user has a meeting notice. With automatic processing, Organizer processes meeting notices and updates the user's Calendar section automatically.

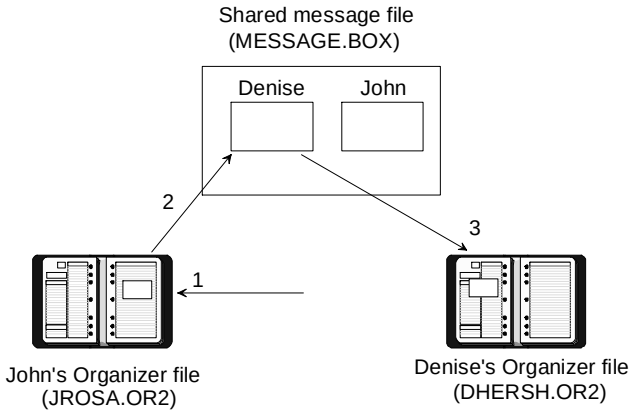
The typical sequence of events when scheduling a meeting with both types of processing is depicted in the following examples. Refer users to the Organizer Help file for information on responding to meeting notices.

Scheduling a meeting with manual processing

In this example, John wants to schedule a meeting with Denise. John, Denise, and the shared message file (MESSAGE.BOX) are on the same network file server. Denise uses manual processing for her meeting notices and accepts the meeting. John uses automatic processing for his meeting notices.

After John chooses Create - Appointment and selects the date, time, and duration for the meeting, he clicks Invite to select attendees. John clicks Names and selects Denise from the Names list box. (The Names list box displays all names in the ORGNAMES.BOX file.)

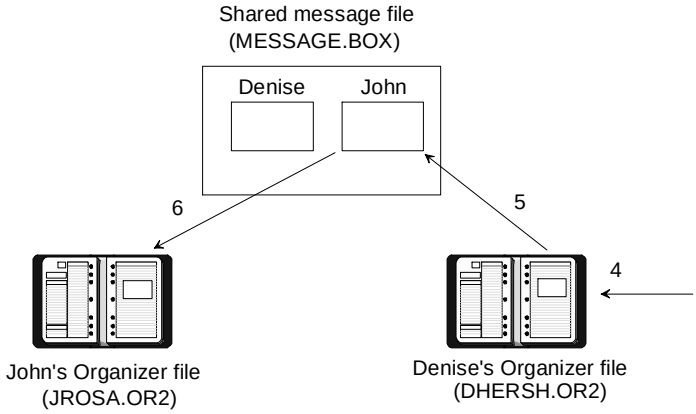
Organizer displays Denise's free and busy times in a graphical format on John's screen. John checks to see when Denise is available, and clicks OK to accept the date and time for the meeting.



John clicks OK to enter the meeting in his Calendar, and Organizer creates a meeting invitation to send to the outbound section of his Organizer file (1).

John's Organizer processes the invitation in the outbound section of John's Organizer file, and copies a separate invitation into the shared message file (2).

Denise's Organizer accepts the invitation from the shared message file into the inbound section of her Organizer file. The hands in the group-scheduling icon shake when Denise receives the meeting invitation (3).



Denise responds to the meeting invitation, and Organizer copies the meeting reply from the inbound section of her Organizer file to the outbound section (4).

Denise's Organizer processes the meeting reply in the outbound section of her Organizer file, and Organizer copies a separate reply into the shared message file (5).

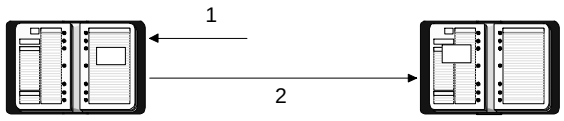
John's Organizer accepts the reply from the shared message file into the inbound section of his Organizer file, processes the reply, and updates his Calendar section automatically (6).

Scheduling a meeting with automatic processing

In this example, John wants to schedule a meeting in a conference room. John and the conference room are on the same network file server. The conference room accepts the meeting and uses automatic processing for its meeting notices.

After John chooses Create - Appointment and selects the date, time, and duration for the meeting, he clicks Invite to select attendees. John selects the conference room from the list of rooms.

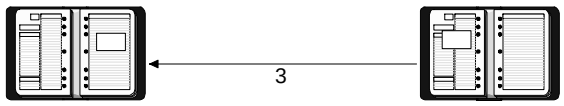
Organizer displays the free and busy times for the conference room in a graphical format on John's screen. John checks to see when the conference room is available, and clicks OK to accept the date and time for the meeting.



John's Organizer file

John clicks OK to enter the meeting in Calendar, and Organizer writes a meeting invitation into the outbound section of his Organizer file (1).

Organizer then accepts the invitation in the outbound section of his Organizer file, and copies a separate invitation directly into the inbound section of the conference room's Organizer file. Organizer processes the invitation, and updates the conference room's Calendar section automatically (2).



John's Organizer file

Organizer reads the conference room's meeting reply in the outbound section of its Organizer file, and Organizer copies a separate reply directly into the inbound section of John's Organizer file, processes the reply, and updates his Calendar section automatically (3).

Installing Organizer single-server scheduling on a network

The following general steps describe how to install Organizer single-server scheduling on a network. The steps relate directly to sections in this chapter.

- Complete the installation checklist, below.
- (Optional) Review the directory structure for Organizer single-server scheduling.
- Install Organizer program files on the file server with the Install program.
- Install Organizer on users' workstations.

Organizer single-server scheduling installation checklist

Fill out this checklist before you begin so that you can easily find and use the information necessary for installing and setting up Organizer.

Item	*Your information*
☐ Type of network (example: NetWare)	_____
☐ Server name where Organizer files are stored (example: ORGSCHED)	_____
☐ Volume where Organizer files are stored (example: SYS)	_____
☐ Drive letter for Organizer program directory (example: M)	_____
☐ Name of Organizer program directory (example: \LOTUS\ORG2)	_____
☐ Name of directory for Organizer files (example: \LOTUS\ORG2\ORGFILES)	_____

Continued

	Item	*Your information*
☐	Name of directory for shared message file and directory services file (example: \LOTUS\ORG2\MSGBOX)	_____
☐	Name of directory for Lotus shared tools (example: \LOTUS\LOTUSAPP)	_____

Organizer single-server scheduling directory structure

To use Organizer single-server scheduling, you must complete a server installation. A file server installation copies all the Organizer single-scheduling files to the file server. Then, each user runs a node installation from the network to copy files necessary to run Organizer from their workstations without copying all the files to their hard disks.

The program directory contains Organizer program files. The default name for this directory is \LOTUS\ORG2. You can name the directory anything you want, though Lotus recommends \LOTUS\ORG2.

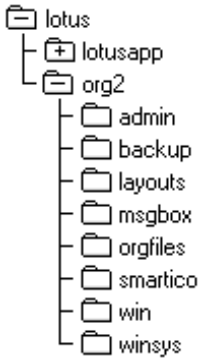
Install creates the following directories in \LOTUS\ORG2. You *shouldn't* change the directory names.

Directory name	*Description*
\ADMIN	Contains files for Lotus Organizer Administration 2.1. (This directory is optional.)
\BACKUP	Stores backup copies of .OR2 files.
\LAYOUTS	Contains report formats and print layouts.
\MSGBOX	Contains shared message file (MESSAGE.BOX) and directory services file (ORGNAMES.BOX).
\ORGFILES	Contains Organizer (.OR2) files stored on the file server and sample .OR2 files. Each Organizer file *must* reside on the file server to use Organizer single-server scheduling.
\SMARTICO	Contains a bitmap file used by Organizer.
\WIN	Contains the ORG2.INI file and the .INI files for the network you select in the Organizer Scheduling Configuration dialog box during Install. These files are copied to the user's Windows program directory when the user runs a Node Install from the network.
\WINSYS	Contains .DLL files that are copied to the user's Windows system directory when the user runs a Node Install from the network.

Install also creates the Lotus shared tools directory (\LOTUSAPP) in the \LOTUS directory. This directory contains subdirectories and files shared by other Lotus applications. You can name this directory anything you want, though Lotus recommends \LOTUS\LOTUSAPP. If you have other Lotus applications installed on the file server, Lotus recommends that you select the same shared tools directory used by the other Lotus applications.

Note The Common Directory entry in the [Lotus Applications] section of the LOTUS.INI file points to the location of the Lotus shared tools directory (for example, M:\LOTUS\LOTUSAPP).

The following illustration shows how Install arranges file server directories for Organizer when you complete a file server installation and select Single-server for group scheduling:



Using Install for single-server scheduling

Use Install to do the following:

- Record your company name on your copy of Organizer.
- Select Server install to copy Organizer files to the file server.
- Select the Organizer features to install.
- Create the necessary directories for Organizer files.
- Enable group scheduling and choose your scheduling configuration method for Organizer.
- Copy the Organizer program files to the file server.
- Add icons to the Windows program group you select.

Before you run Install

Be sure you have the following:

- The Organizer Release 2.1 disks that came in your package.
- A minimum of 10MB of free disk space on the network file server to store Organizer program files. In addition, you need 2MB of disk space for the additional temporary files that Install requires to perform its installation operation. (Install deletes these temporary files automatically when installation is completed.) Install shows you the amount of space you need for the program files, as well as the amount of space you currently have available on each drive.
- The installation checklist you completed earlier in this chapter.

Using Install Help

Install consists of a series of dialog boxes that are generally self-explanatory. If you need more information about the installation instructions, use Install Help. You get Help by clicking the Help button in the current dialog box or pressing **ALT+H**.

Running Install

You must run Install using Windows 3.1 or later, running with MS-DOS 5.0 or later.

Note This procedure assumes you are running Install from a high-density A drive. If you start Install from a different drive, substitute the letter of that drive in this procedure.

1. Log in to the network with full access rights and connect to the file server on which you want to install Organizer.
2. Insert the Install Disk in drive A and close the drive door.
3. Open the Windows Program Manager and choose File - Run.
4. Type a:install in the Command Line text box and click OK.
5. Enter your company name, select the Install on a file server checkbox, and click Next.

   If you leave your name blank, users enter their names during a node installation, but the company name remains the same for all users.

   Note If you're installing Organizer on a stand-alone workstation, make sure the Install on a file server checkbox is *not* checked.
6. Click Yes to confirm the name you entered in step 5.

7. Select Server install and click Next.
   - Click Open to open the network administrator's guide file (READNET.TXT) or click Next to turn to the next screen without opening the file.
   - Select All features - Automatic install to install Organizer and Lotus Organizer Administration 2.1 program files, and click Next. (If you click Customize features - Manual install and then click Next, you can decide which Organizer features to install.)
8. Select the drive where you want to copy the program files from the Drive list box, and specify the name of the Organizer program directory.

   (The default drive and directory is C:\LOTUS\ORG2.)
9. Select the drive where you want to copy files in the Lotus shared tools directory, specify the name of the Lotus shared tools directory, and click Next.

   The default drive and directory is C:\LOTUS\LOTUSAPP. If you have other Lotus applications installed on the file server, Lotus recommends that you select the same shared tools directory used by the other Lotus applications.
10. Select the Enable group scheduling features checkbox if it is not selected.
11. Select the type of network you are running from the Network list box, select Single-server from the Scheduling list box, and click Next.

    Note From the Network list box, select MS-Net Compatible for Banyan VINES and DEC PATHWORKS version 4.1 networks. Select LAN Manager for DEC PATHWORKS version 5.0.
12. Follow the remaining instructions that appear on the screen.

Installing Organizer single-server scheduling on users' workstations

Users install Organizer single-server scheduling by running Node Install. The following list contains the information you should supply to your users when they install with Node Install:

- The drive letter and name of the program directory where you installed Organizer (for example, M:\LOTUS\ORG2)
- Directions for starting Organizer

Refer users to Chapter 1 in *Exploring Organizer* for instructions on starting Organizer.

Running Node Install

1. Log in to the network and connect to the file server on which your administrator installed Organizer.
2. Start Windows.
3. Choose File - Run.
4. Enter the drive letter and name of the network directory where your administrator installed Organizer, followed by the name of the Install program (for example, M:\LOTUS\ORG2\INSTALL.EXE), and click OK.
5. Enter your name and click Next.
6. Click Yes to confirm the name entered in step 5.
7. Select the drive where you want to copy the Organizer files, specify the name of the Organizer program directory, and click Next.
8. Select the Organizer files you want to install on your hard disk.
9. Follow the remaining instructions that appear on the screen.

Managing Organizer single-server scheduling files

Lotus Organizer Administration 2.1 is a Microsoft Windows application for managing Organizer group scheduling files. It lets you do the following:

- Display entries for Organizer users, rooms, and resources.
- Create, configure, and maintain entries for users, rooms, and resources.
- Select a single entry or multiple entries.
- Select entries that match specific criteria.
- Edit and delete entries for users, rooms, and resources.
- Reset a password on a user's Organizer file.
- Display errors and informational messages on the screen, in a log file, or both.
- Display Help based on the task you're doing.
- Assign access levels to Organizer files.
- Compact Organizer files.

Starting and ending Lotus Organizer Administration 2.1

Use the following procedures to start and end Lotus Organizer Administration 2.1.

Note You *must* complete a file server installation followed by a node installation on the *same* system before starting Lotus Organizer Administration 2.1.

Starting Lotus Organizer Administration 2.1

1. Start Windows and display the Program Manager window.
2. If necessary, open the group window that contains the Lotus Organizer Administration 2.1 program icon.

3. Double-click the Lotus Organizer Administration 2.1 program icon.

Ending Lotus Organizer Administration 2.1

Choose File - Exit or press **ALT+F4**.

Using Help

Lotus Organizer Administration 2.1 provides Help based on the task you're doing. For example, if you're using the Edit Selected dialog box, you can display a Help topic about editing entries.

To get Help on any dialog box, click the Help button in the dialog box.

To get Help at any time, press **F1**.

To print the current Help topic, click the Print icon at the top of the topic's Help window.

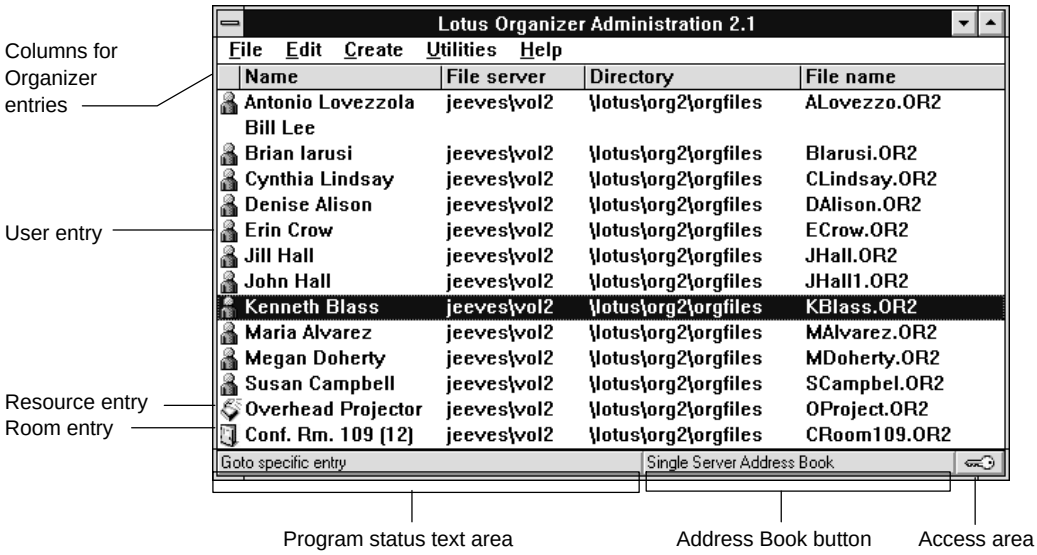
To display a list of topics related to the current topic, click the Related Topics icon at the top of the topic's Help window. You can display a topic in the list by selecting it, or you can return to the Help Contents window.

You can also display Help topics that relate to a keyword or phrase you enter. Choose Help - Search and click Help for instructions.

The Lotus Organizer Administration 2.1 window

After you start Lotus Organizer Administration 2.1, it displays the window below. The window displays Organizer entries it receives from the ORGNAMES.BOX file, along with any Organizer scheduling information currently associated with the entries. The file's directory is pointed to by the MessageBox entry in the [Scheduling] section of the ORG2.INI file.

The following illustration displays an example of the Lotus Organizer Administration 2.1 window after you start Lotus Organizer Administration 2.1 with an existing ORGNAMES.BOX file and go to a user entry:



Note In the above illustration, the entry for Bill Lee has no scheduling information because he has not yet created his .OR2 file.

Columns for Organizer entries

Lotus Organizer Administration 2.1 presents data for Organizer entries in the following columns:

Column	*Displays*
Name	Name of the entry (user, room, or resource)
File server	The file server name and volume name associated with the Organizer file
Directory	The directory within which the entry's Organizer file is stored
File name	The entry's Organizer file name

Resizing columns

When a column is too narrow to display an entire field, Lotus Organizer Administration 2.1 displays only the part of the field that fits in the column where it is displayed. To increase your column width for more data, you can widen the column.

Note All columns but the icon column are resizable.

1. Move the mouse pointer to the right border of the column name.

   The mouse pointer changes to a black two-headed horizontal arrow.

2. Drag the pointer to the right until the column is the width you want.

Icons

Each Organizer entry type in the Lotus Organizer Administration 2.1 window has an icon associated with it (except any Organizer users who have not created their Organizer files). The following table summarizes the icons:

Icon	*Description*
	A user with an Organizer file for group scheduling
	An Organizer file set up as a room
	An Organizer file set up as a resource
	A volume alias (Lotus Organizer Scheduling for the Macintosh Release 1.1 entries only)

Status bar

Consists of the following areas that display information about the Lotus Organizer Administration 2.1 window:

- Program status text area that displays prompts for using menus and commands
- Address Book button that lists Single Server Address Book
- Access area that displays either  to indicate read-write access to the ORGNAMES.BOX file; or to indicate read-only access

Selecting and deselecting entries

Before you can work with an entry, you must select it. When you select an entry in the Lotus Organizer Administration 2.1 window, the entry is highlighted. You can perform the following tasks:

- Select a single entry.
- Select multiple entries.
- Deselect a single entry or multiple entries.
- Select entries that match criteria you specify.
- Go to a single entry.

Selecting a single entry

In the Lotus Organizer Administration 2.1 window, you can select a single entry and then use Lotus Organizer Administration 2.1 commands to work with it.

With the left mouse button, click the entry you want to select.

In addition, you can use the following keys to select an entry:

Press	*To select*
↑ or ↓	An entry above or below the current selection
END	The last entry in the list of entries
HOME	The first entry in the list of entries
PG UP	The entry at the top of the current window
PG DN	The entry at the bottom of the current window

Selecting multiple entries

You can select more than one entry at a time in order to perform a task with multiple entries at one time. You can select entries that appear in sequence or out of sequence.

To select multiple entries in sequence

1. Click the first entry you want to select.
2. Drag to the last entry you want to select.

Tip You can also click the first entry and press and hold **SHIFT** while you click the last entry you want to select.

To select multiple entries out of sequence, press and hold **CTRL** while you click each entry.

Deselecting a single entry or multiple entries

When you deselect an entry in the Lotus Organizer Administration 2.1 window, Lotus Organizer Administration 2.1 removes the highlight from the entry.

To deselect a single entry, select another entry.

To deselect multiple entries, press and hold **CTRL** while you click each entry.

To deselect all entries, choose Edit - Deselect All.

Selecting entries that match specific criteria

Selecting entries that match criteria you specify is useful when you want to perform one task on multiple entries at a time. For example, you may want to select several Organizer users on a file server and change the name of their directory.

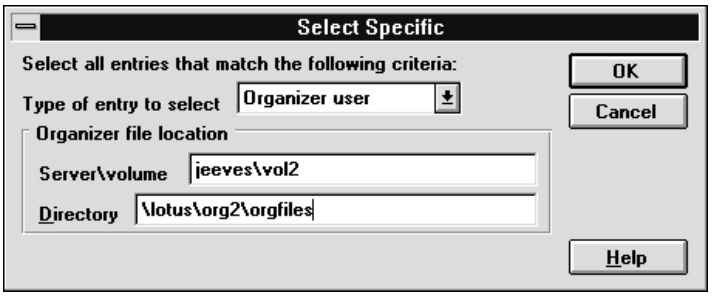
1. Choose Edit - Select Specific.
2. Select the type of entry.
3. Enter the desired information in the Select Specific dialog box.

   For example, you could select all entries that have a specific directory by entering its name in the Directory text box.

   Note If you leave a text box blank, Lotus Organizer Administration 2.1 will not use it in the search.
4. Click OK.

   When you click OK, Lotus Organizer Administration 2.1 deselects all current selections in the Lotus Organizer Administration 2.1 window and selects all entries that meet the desired criteria.

The following illustration shows a completed dialog box for selecting all Organizer users with a specific directory:



The following table describes the options in the Select Specific dialog box:

Option	*Result*
Type of entry to select	Lets you limit the search to a specific type of Organizer entry.
Server\volume	Restricts the search to entries whose Organizer files are on the specified file server and volume.
Directory	Restricts the search to entries whose Organizer files have the specified directory.

Note Lotus Organizer Administration 2.1 displays "Server\volume" for Novell NetWare and "Server\resource" for LAN Manager and MS-Net compatible networks in the Organizer file location list box.

You can use the Select Specific dialog box to select all users that match specific criteria, deselect the entries you don't want to work with, and then edit the information for the remaining entries. For more information, see "Editing entries," later in this chapter.

Going to a single entry

1. Choose Edit - Go To.
2. Enter the first letter or few letters of the entry you want to go to (for example, if you enter lind and click OK, Lotus Organizer Administration 2.1 goes to the first Organizer entry that begins with these four letters).
3. Click OK.

Tip You can also go to an entry by entering the sequence of characters quickly in the Lotus Organizer Administration 2.1 window.

Naming Organizer files

When you create an Organizer entry for a user, room, or resource, Lotus Organizer Administration 2.1 provides these methods for naming the Organizer (.OR2) file.

- First initial and last name
- First name and last name
- Specific name you enter

Lotus Organizer Administration 2.1 uses an algorithm to guarantee unique Organizer file names in each ORGNAMES.BOX file. By default, Lotus Organizer Administration 2.1 uses first initial and last name when it first creates the .OR2 file name. For example, Daniel Rosa's Organizer file would be DRosa.OR2 by default.

If you later add an Organizer user whose first initial and last name already exist in the ORGNAMES.BOX file, Lotus Organizer Administration 2.1 appends *n* to the existing file name, where *n* is a number starting with 1. (*n* increases in increments of 1.) For example, after Daniel Rosa's file (DRosa.OR2) is created, Dorothy Rosa's .OR2 file name would be DRosa1.OR2, David Rosa's .OR2 file name would be DRosa2.OR2, and so on.

When generating unique file names, Lotus Organizer Administration 2.1 may convert certain characters that are not valid MS-DOS file name characters (for the current code page in use) to similar characters or to the _ (underscore). If you don't like the name Lotus Organizer Administration 2.1 generates, use the Specific option in the Edit Selected dialog box to rename the .OR2 file. Remember, .OR2 file names must be unique in the specified directory.

When you select first name and last name, Lotus Organizer Administration 2.1 uses as many characters in the first name as it can, followed by as many characters in the last name until it reaches the DOS eight-character limit for file names. With this naming scheme, Judy Hersh's .OR2 file name would be JudyHers.OR2, Timothy Wood's .OR2 file name would be TimothyW.OR2, and Caroline Rosa's .OR2 file name would be Caroline.OR2.

If the .OR2 file name can't fit within the DOS, eight-character file name limit, Lotus Organizer Administration 2.1 truncates characters from the name when it creates the .OR2 file name. For example, Mike Greenwood's .OR2 file name would be MGreenwo.OR2. If necessary, the .OR2 name is further truncated to guarantee unique .OR2 file names. For example, Marcia Greenwood's .OR2 file name would be MGreenw1.OR2, Martin Greenwood's .OR2 file name would be MGreenw2.OR2, and so on.

When you enter a specific name for the .OR2 file, you are restricted only by DOS file-naming conventions and the current .OR2 names.

Creating an entry

Lotus Organizer Administration 2.1 lets you create entries for new Organizer users, rooms, and resources in the ORGNAMES.BOX file. Lotus Organizer Administration 2.1 also creates the Organizer (.OR2) file for the entry. When you create a new entry, Organizer uses this information for single-server calendaring and scheduling.

When you enter data for your Organizer network to create entries for Organizer users, rooms, and resources, keep these points in mind:

- For static connections, the Server\volume text box is blank and you *must* include a drive letter in the Directory text box.
- For dynamic connections, enter data in *both* the Server\volume and Directory text boxes. *Don't* include a drive letter in the Directory text box unless your users work across different network operating systems.

Creating an entry for an Organizer user

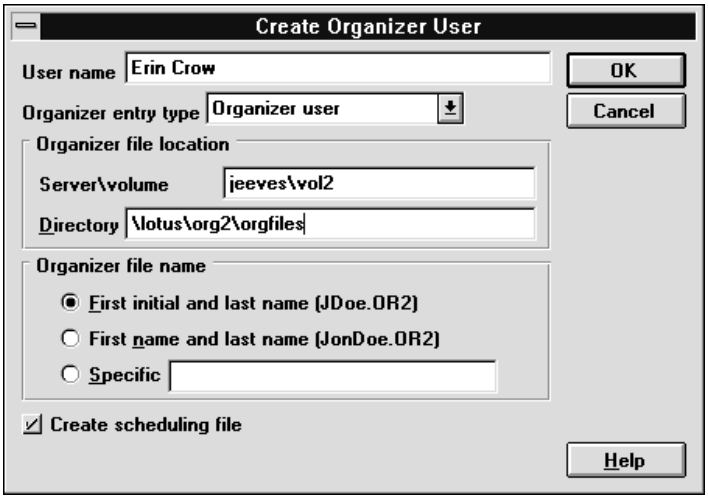
1. Choose Create - Organizer User.

   Lotus Organizer Administration 2.1 displays Organizer User in the Organizer entry type drop-down box.
2. Enter the name of the user in the User name text box (for example, Erin Crow).
3. Enter the required data for your Organizer network in the Server\volume text box and the Directory text box for this user.
4. Select a method for naming the user's Organizer file or enter a specific Organizer file name (for example, ERINC.OR2).

   Lotus Organizer Administration 2.1 uses the default (first initial and last name) when naming Organizer files.
5. Select Create scheduling file if it is not selected.

   Tip If you are upgrading an Organizer Release 1.1 or Release 2 PIM user to single-server scheduling, deselect Create scheduling file to guarantee that Lotus Organizer Administration 2.1 reserves a unique file name for the user. When the user tries to open Organizer PIM files, Organizer displays a dialog box asking whether or not to convert the file to an .OR2 file.
6. Click OK.

The following illustration shows a completed entry for a new Organizer user:



Creating an entry for an Organizer room

Organizer 2.x has different entry types for rooms and resources. Rooms in Organizer 2.x are meeting or conference rooms. In Organizer 1.1, there was only one entry type for rooms and resources.

1. Choose Create - Room.

   Lotus Organizer Administration 2.1 displays Room in the Organizer entry type drop-down box.

2. Enter the name of the new room in the User name text box.

   Tip When naming rooms, enter the conference room number, followed by its capacity in parentheses: for example, Conf. Rm. 109 (12).

3. Enter the data for your Organizer network in the Server\volume text box and the Directory text box for this room.

4. Select a method for naming the room's Organizer file or enter a specific Organizer file name (for example, CRoom109.OR2).

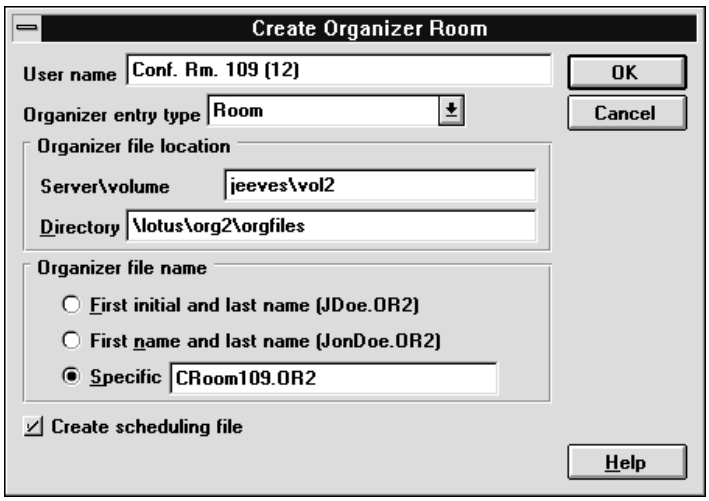
   In this example, the default .OR2 file name is C(12).OR2.

5. Select Create scheduling file if it is not selected.

   Tip If you are upgrading an Organizer Release 1.1 resource for a conference room to an Organizer Release 2.x room, deselect Create scheduling file to guarantee that Lotus Organizer Administration 2.1 reserves a unique file name for this room. Then you need to start the Organizer client and convert the .ORG file for this room to an .OR2 file.

6. Click OK.

The following illustration shows a completed entry for a new room:



Tip After creating a room entry, you may wish to edit its User Access List to give the room administrator special access to the Organizer file. See "Assigning access levels to an Organizer file," later in this chapter.

Creating an entry for an Organizer resource

Organizer 2.x has different entry types for rooms and resources. Resources in Organizer 2.x are items like company vehicles, computers, and audio visual equipment. In Organizer 1.1, there was only one entry type for rooms and resources.

1. Choose Create - Resource.

   Lotus Organizer Administration 2.1 displays Resource in the Organizer entry type drop-down box.

2. Enter the name of the new resource in the User name text box (for example, Overhead Projector).

   Tip Users, rooms, and resources are grouped together and sorted separately in the ORGNAMES.BOX file.

3. Enter the data for your Organizer network in the Server\volume text box and the Directory text box for this resource.

4. Select a method for naming the resource's Organizer file or enter a specific Organizer file name.

   In this example, the default .OR2 file name is OProject.OR2.

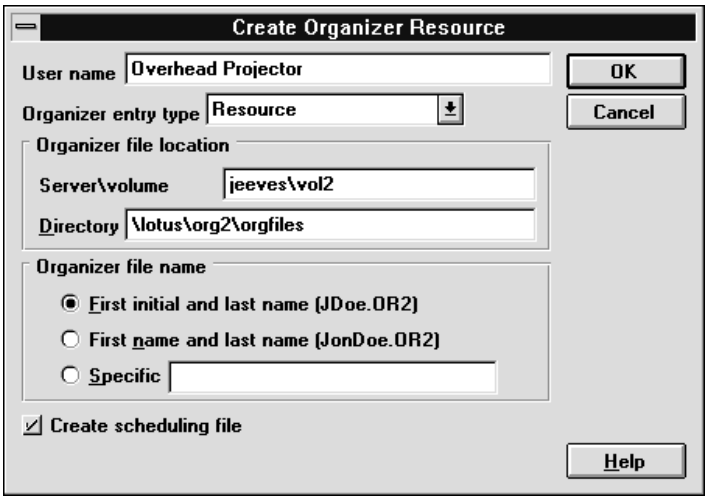
5. Select Create scheduling file if it is not selected.

   Tip If you are upgrading an Organizer Release 1.1 resource to an Organizer Release 2.x resource, deselect Create scheduling file to

guarantee that Lotus Organizer Administration 2.1 reserves a unique file name for this room. Then you need to start the Organizer client and convert the .ORG file for this room to an .OR2 file.

6. Click OK.

The following illustration shows a completed entry for a new resource:



Tip After creating a resource entry, you may wish to edit its User Access List to give the resource administrator special access to the Organizer file. See "Assigning access levels to an Organizer file," later in this chapter.

Editing entries

Before you edit an entry, you must select it. (See "Selecting and deselecting entries," earlier in this chapter, for more information.) You can edit a single entry or multiple entries.

The following section demonstrates how to edit an entry for an Organizer user. Use a similar procedure for editing an entry for an Organizer room or resource.

Editing a single entry

1. Double-click the entry you want to edit.

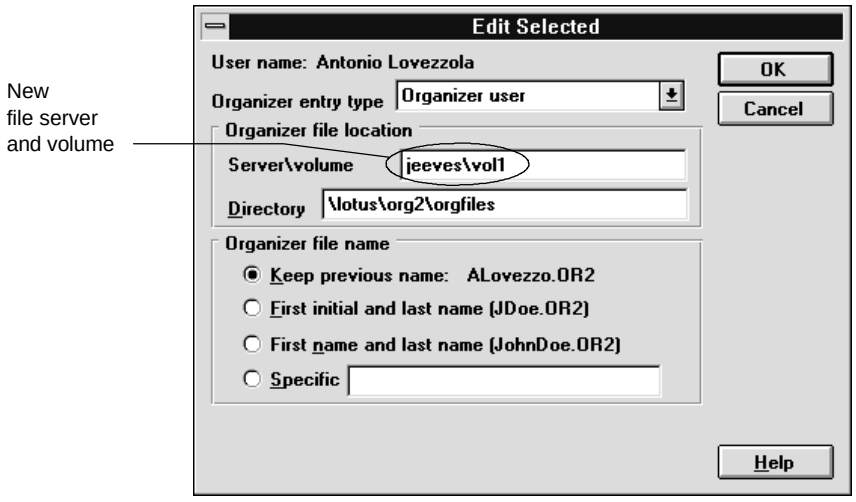
   Tip You can also edit an entry by selecting it and then pressing **ENTER**.

2. Make necessary changes to the Organizer file location and Organizer file name in the appropriate text boxes.

   Note When you edit an entry, Lotus Organizer Administration 2.1 uses the Keep previous name option, which is the default, for the Organizer file name.

3. Click OK.

   The following illustration shows an edited entry for an Organizer user. The file server and volume were changed from jeeves\vol2 to jeeves\vol1.



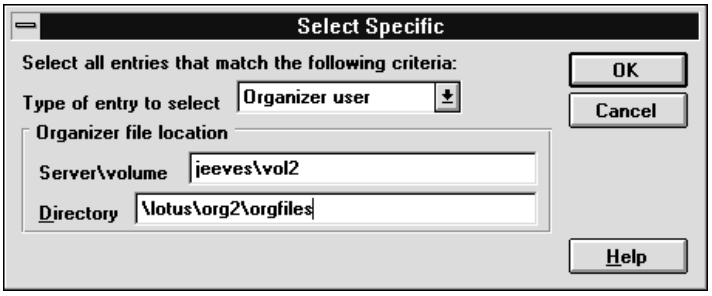
Editing multiple entries

Lotus Organizer Administration 2.1 lets you edit multiple entries at one time that you selected by entering data in the Select Specific dialog box. This feature is useful for tasks that involve a large number of entries. For example, you might want to move only 25 out of 50 users on a file server and volume named jeeves\vol2 to jeeves\vol1.

The next procedure shows how to edit the directory name for multiple Organizer user entries.

1. Choose Edit - Select Specific.
2. Use the Select Specific dialog box to select the entries you want to edit.

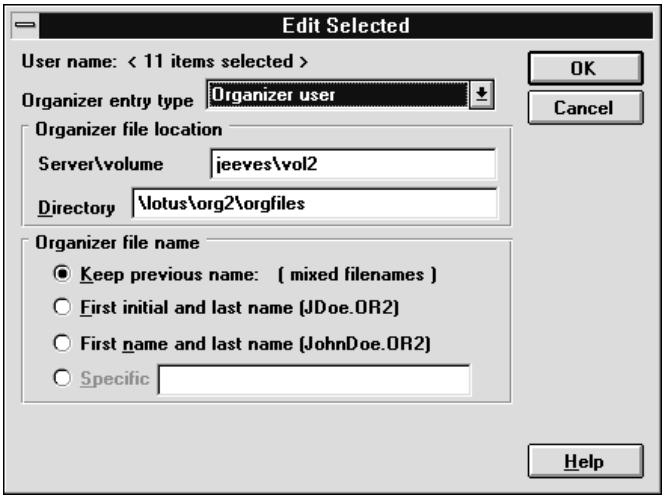
For example, the following illustration shows a completed dialog box for selecting Organizer users with a specific directory:



3. Click OK.
4. (Optional) Deselect entries in the Lotus Organizer Administration 2.1 window that you don't want to change.
5. Choose Edit - Edit Selected.

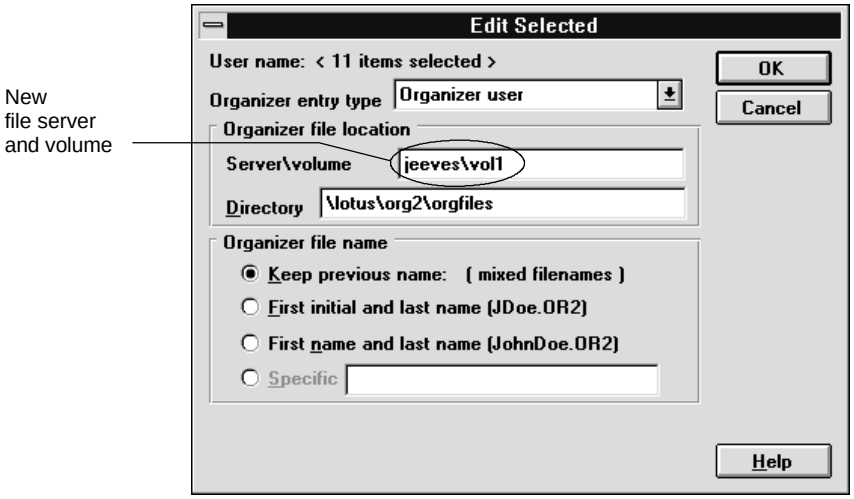
   Lotus Organizer Administration 2.1 displays the number of selected Organizer entries, the entry type (if all the entries are the same Organizer type), and the scheduling information that the entries have in common (Server\volume and Directory).

   The following illustration shows the Edit Selected dialog box for the Organizer user entries selected in step 2:



6. Make necessary changes to the file server and volume name.
7. Click OK.

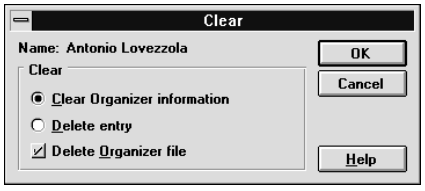
The following illustration shows how to edit the file server and volume from jeeves\vol2 to jeeves\vol1 for the Organizer user entries selected in step 5:



Clearing Organizer information from an entry

When you clear an Organizer entry, Lotus Organizer Administration 2.1 removes the entry's Organizer scheduling information from the ORGNAMES.BOX file. Clearing an entry does, however, physically retain it. You can also clear multiple entries.

1. Select the entry you want to clear.
2. Choose Edit - Clear.
3. (Optional) The Delete Organizer file option is only available when at least one selected entry has an Organizer file associated with it. If you select this option, the Organizer file for this user is erased from the file server.

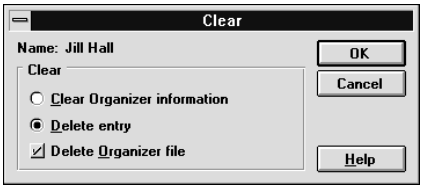


4. Click OK.

Deleting an entry in the ORGNAMES.BOX file

Caution When you delete an Organizer entry, Lotus Organizer Administration 2.1 removes the entry from the ORGNAMES.BOX file and you cannot retrieve it. You can also delete multiple entries.

1. Select the entry you want to delete.
2. Choose Edit - Clear.
3. Select Delete entry.
4. (Optional) The Delete Organizer file option is only available when at least one selected entry has an Organizer file associated with it. If you select this option, the Organizer file for this user is erased from the file server.

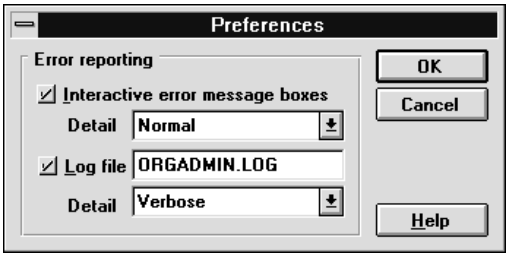


5. Click OK.
6. Click Yes.

Setting preferences

You use the Preferences dialog box to tell Lotus Organizer Administration 2.1 how you want it to display errors and informational messages: on the screen, in a log file, or both. Lotus Organizer Administration 2.1 creates the default log file, named ORGADMIN.LOG, and places it in the directory from which you're running Lotus Organizer Administration 2.1. You can use a text editor to open the log file and view it.

1. Choose File - Preferences.



2. To display errors and informational messages on the screen, under Interactive error message boxes, click the Detail drop-down box, and select the type of messages you want to display: Normal (errors and warnings); Verbose (errors, warnings, and status).
3. To display errors and informational messages in a log file, under Log file, click the Detail drop-down box, and select the type of messages you want to log: Normal (errors and warnings); Verbose (errors, warnings, and status).
4. If you select Log file, enter a new file name in the text box.
5. Click OK.

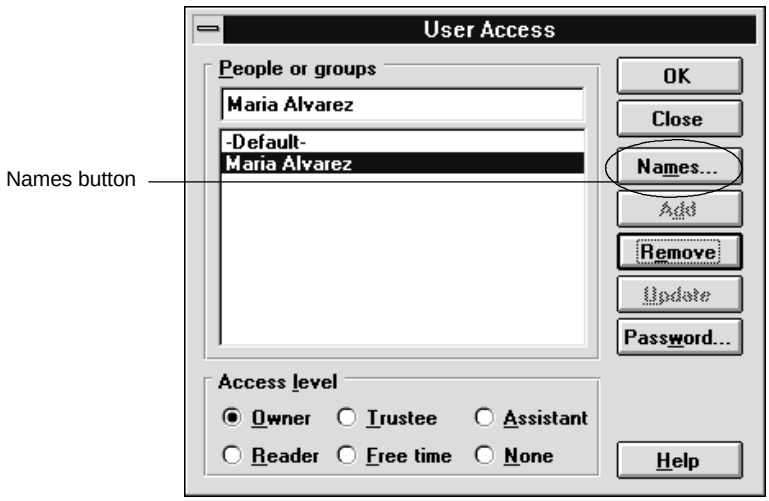
Lotus Organizer Administration 2.1 creates initialization entries for the choices you make in the Preferences dialog box in the [Org Admin] section of the ORG2.INI file. See "Maintaining the ORG2.INI file," later in this chapter, for more information.

Assigning access levels to an Organizer file

You can assign access levels to Organizer files for anyone on your network. When you use Lotus Organizer Administration 2.1 to create Organizer files for users, the default access level is Free time, which lets other users see only the available time in a user's Calendar section while using group scheduling. When users open their own files, the files have Owner access.

When you use Lotus Organizer Administration 2.1 to create Organizer files for rooms or resources, the default access level is Assistant. You can assign different access levels to rooms and resources.

1. From the Lotus Organizer Administration 2.1 window, select the user entry whose Organizer file access you want to change.
2. Choose Utilities - User Access.
3. Click Names to see a list of the names of other users to whom you can give access rights.



4. Select a name from the list and click Add.

   You can add more than one name.

5. Click Close.
6. Under People or groups, select the name of a person you added.
7. Under Access level, select the level of access rights you want to give this user.

   A table of access rights is included after this procedure.

8. Click Update.
9. Repeat steps 6 - 8 for any other user whose name you added.
10. Click OK.
11. Click OK.

Any changes you make to access rights will take effect the next time the Organizer file is opened.

Tip To change the default access for all users, select Default at the top of the list box, select an access level, and click Update.

The following table summarizes Organizer access rights:

Access level	*Access privileges*
Owner	Full access rights, including read, write, customize and free-time access. Owners can access confidential entries, set or change passwords, and set the user access level for other users.
Trustee	In addition to assistant rights, trustees can also customize the file. Trustees can't view or change confidential entries or set the user-access level for other users.
Assistant	Read, write, and free-time access. Assistants can schedule and respond to meetings in your file and change preferences. Assistants can't view or change entries that are confidential or set the user-access level for other users.
Reader	Read only access and free-time access.
Free time	Free-time and busy-time view of a Calendar for group-scheduling purposes; individual appointment details can't be viewed by others.
None	No access to the file.

Resetting a password for a user's Organizer file

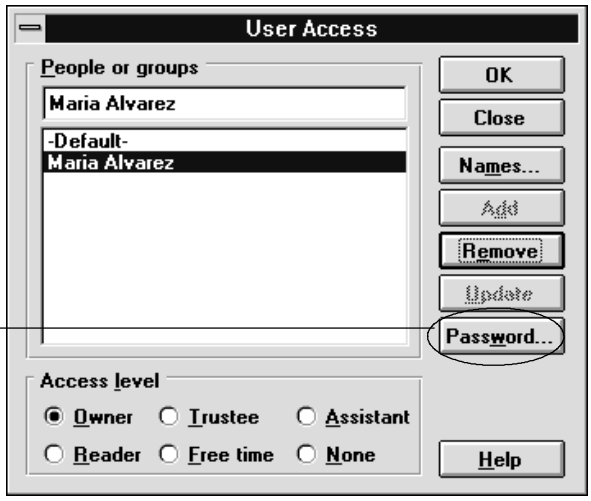
Passwords are only checked when there is no network login to validate the user and permit access to a user's named scheduling file. When users create a password for a file, they must type that password to access the file when they are disconnected from the LAN.

Also, when disconnected from the LAN, any other user to whom they granted access rights must also enter the password to open the file. Refer users to the Organizer client Help file for information on protecting their work with a password.

Note If users take an .OR2 file off the LAN, they may want a password because they don't have a network login to provide security. Organizer 2.1 provides a courtesy dialog as a reminder to users to create and maintain a password on their file.

If a user forgets the password to his or her Organizer file, Lotus Organizer Administration 2.1 lets the administrator reset the password.

1. From the Lotus Organizer Administration 2.1 window, select the user entry whose password you want to reset.
2. Choose Utilities- User Access.
3. Click Password.



4. Enter a password.
5. Click OK.
6. Confirm the password by entering it again.
7. Click OK to confirm the password.
8. Click OK.
9. Inform the user of the new password.

The user must enter the password to open the file. The user can change the password you created by choosing File - Organizer Preferences - User Access in Organizer. The user should also tell the password to any other user to whom they granted access rights.

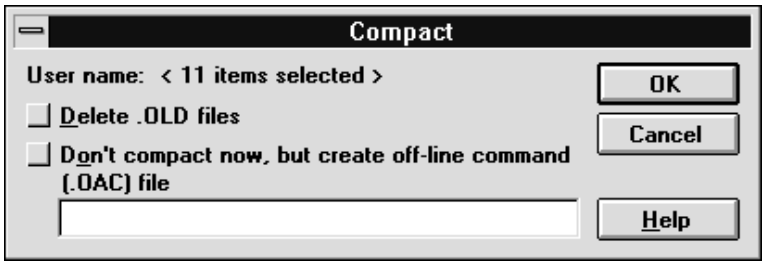
Compacting Organizer files

You should compact Organizer files periodically to reduce their file size. Depending on your users and the size of their .OR2 files, you can choose to compact .OR2 files on a weekly or monthly basis.

You can compact files while you are using Lotus Organizer Administration 2.1, or, in Batch mode. The following procedures describe both methods for compacting files.

Using Lotus Organizer Compact 2.1

1. From the Lotus Organizer Administration 2.1 window, select the entries whose Organizer files you want to compact.
2. Choose Utilities - Compact.



3. To save the original .OR2 files that Lotus Organizer Administration 2.1 will rename with the extension .OLD, make sure Delete .OLD files isn't selected. To delete .OLD files after compacting for the files is completed, select Delete .OLD files.
4. To compact the selected entries, make sure Don't compact now, but create off-line command (.OAC) file is not selected.
5. Click OK.

As Lotus Organizer Administration 2.1 rebuilds the .OR2 file for each entry, it displays a progress indicator with the compact status for each file.

Using Lotus Organizer Compact 2.1 in Batch mode

Lotus Organizer Administration 2.1 lets you compact Organizer files in Batch mode. You must first create the Organizer command (.OAC) file before you can run it in Batch mode.

1. From the Lotus Organizer Administration 2.1 window, select the entries whose Organizer files you want to compact.
2. Choose Utilities - Compact.
3. To save the original .OR2 files that Lotus Organizer Administration 2.1 will rename with the extension .OLD, make sure Delete .OLD files is not selected. To delete .OLD files after compacting for the files is completed, select Delete .OLD files.
4. To compact the selected entries in Batch mode, select Don't compact now, but create off-line command (.OAC) file.

   By default, Lotus Organizer Administration 2.1 creates the file named COMPACT.OAC and places it in the Organizer \ADMIN directory. You can enter another name for the file in the text box.
5. Click OK.

After you create the .OAC file, you can run it from Program Manager.

6. From Program Manager, create a copy of the Lotus Organizer Administration 2.1 program icon: press and hold **CTRL** while you drag this program icon from its current location to another location in the Lotus Applications group window.
7. Select the copied Lotus Organizer Administration 2.1 program icon and choose File - Properties.
8. Type Batch Compact for the Description
9. Edit the path to Lotus Organizer Administration 2.1 in the Command Line field by typing a space and the name of the Lotus Organizer Compact 2.1 command file (for example, C:\LOTUS\ORG2\ADMIN\ORGADMIN.EXE COMPACT.OAC)
10. Click OK.
11. Double-click the Batch Compact program icon to compact the specified Lotus Organizer Compact 2.1 command file.

Lotus Organizer Administration 2.1 compacts the entries according to the options you selected in the Lotus Organizer Compact 2.1 dialog box.

Lotus Organizer Compact 2.1 command file

The Lotus Organizer Compact 2.1 command file is a text file. It may contain the following sections and entries based on login information and options you selected in the Compact dialog box. The sections and entries in the Lotus Organizer Compact 2.1 command file are included below with a brief description of each one.

[Session] section

Commands=1

The number and sequence of commands to execute. Commands must remain set to 1 for Lotus Organizer Administration 2.1. Each command number has a section associated with it. For an example, see "[Command1] section," below.

[Command1] section

AddressBook=c:\lotus\org2\msgbox\orgnames.box

The Address Book that contains names of Organizer users whose Organizer files Lotus Organizer Administration 2.1 will rebuild. For single-server scheduling, the Address Book is the ORGNAMES.BOX file.

SelectionList=[Names]
The name of the section in the command file that lists the names of the users whose Organizer files Lotus Organizer Administration 2.1 will compact.

Command=0
The number for a command you want Lotus Organizer Administration 2.1 to execute. Command *must* remain set to 0 for Lotus Organizer Administration 2.1.

DeleteOldFiles=0
Tells Lotus Organizer Administration 2.1 to delete or not to delete all .OLD files after compacting is complete: 0=do not delete all .OLD files; 1=delete all .OLD files.

[Names] section

Individual names of the Organizer users whose Organizer files Lotus Organizer Administration 2.1 will compact. You insert the list of names by selecting their entries in the Lotus Organizer Administration 2.1 window or by entering them in this section yourself with a text editor.

Maintaining the ORG2.INI file

When you complete an Organizer installation, Install copies the ORG2.INI file from the \ORG2\WIN directory on the file server to the Windows program directory on a local drive. The ORG2.INI file contains the default settings for Organizer initialization entries. You can change these initialization entries to settings that are specific to your site so that users will use them when they complete a node installation. Users can override any of the site-specific settings by changing initialization entries in the ORG2.INI file on their local drive.

If an initialization entry isn't in the ORG2.INI file, Organizer looks for it in the ORG2NET.INI file. If an initialization entry isn't set in either .INI file, then Organizer uses the default value for the initialization entry.

Note See TECHNOTE.OR2 (in the LOTUS\ORG2\ORGFILES directory) for any additions or changes to the .INI entries that were made after this guide was printed.

[Scheduling] section

TransportTimer=60
How often Organizer checks for new outbound meeting notices (in seconds).

TransportProcess=5
Number of meeting notices to read at one time.

CheckNotices=300
How often Organizer checks the local message box for inbound meeting notices (in seconds).

MessageBox=c:\lotus\org2\msgbox
Drive and path for directory services file (ORGNAMES.BOX) and shared message file (MESSAGE.BOX).

[Org Admin] section

Interactive error reporting=TRUE
Tells Lotus Organizer Administration 2.1 whether to display messages on the screen. When set to FALSE, Lotus Organizer Administration 2.1 only writes messages to the log file.

Log error reporting=orgadmin.log
When the administrator selects Log file in the Preferences dialog box, Lotus Organizer Administration 2.1 writes messages to the named log file.

LogOutputDetail=Normal
Controls types of messages to be logged: Normal (errors and warnings); Verbose (errors, warnings, and status).

DisplayOutputDetail=Verbose
Controls types of messages to be displayed: Normal (errors and warnings); Verbose (errors, warnings, and status).

Note There may be more entries in the ORG2.INI file if it was opened or changed.

Changing ORG2.INI file initialization entries

You can change the ORG2.INI initialization entries in the following ways:

- Use the Preferences dialog box (modifies Lotus Organizer Administration 2.1 initialization entries only)
- Edit them manually

The ORG2.INI file in the file server's ORG2\WIN directory is for installation purposes only. It is the master ORG2.INI copied to users' local Windows directory when they complete a node installation. Users should *not* change this file.

Using the Preferences dialog box

You change the initialization entries for Lotus Organizer Administration 2.1 by using the Preferences dialog box. See "Setting preferences," earlier in this chapter, for more information.

Editing ORG2.INI file initialization entries

ORG2.INI is a text file. You can use Ami Pro or a text editor, such as Windows Notepad, to edit it.

1. Log in to the network and connect to the file server on which you installed Organizer.
2. Back up the current ORG2.INI file to another name (for example, ORG2.BAK).
3. Open the ORG2.INI file and make necessary changes to the initialization entries.
4. Save the new ORG2.INI file.

If you're running Organizer, you must exit and restart it for changes to the ORG2.INI initialization entries to take effect.

Index

Special Characters

A

B

C

D

E

F

G

H

I

L

M

N

O

P

R

S

T

U

V

W

X