Lotus

English

Lotus Organizer

An Overview

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To install the Organizer:

1. Start Microsoft® Windows™.
2. Put Disk 1 in Drive A (or the drive you want to use).
3. Choose File/Run from the Program Manager.
4. Type **a: install** (or whatever drive letter you used) and press ENTER.
5. Follow the instructions on the screen.

To use the Organizer on a monochrome system:

1. Install the Organizer.
2. Start the Organizer.
3. Choose Options/Preferences.
4. Select **Monochrome** and choose **OK.**

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55 Cambridge Parkway
Cambridge, MA 02142

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What is Lotus Organizer?

Lotus Organizer™ is a lot like the paper-based organiser you may already use to manage your time and work - only it's much more powerful, and a lot more fun to use.

It's a diary, to-do list, planner, address book, notepad, and anniversary reminder - all in an on-screen notebook with a tab for each section and pages you can turn.

About this Booklet

This booklet will serve as a guide as you explore Lotus Organizer. Use it to

- Understand the purpose of each of the Organizer components and try out each one.
- Get ideas about how the Organizer can help you in your own work.
- Learn a number of ways to use the extensive on-line Help.

This booklet is designed to encourage you to try various features of the Organizer. The Help system is a comprehensive resource that can provide detailed instructions.

Getting Started

1. From your Windows Program Manager, double-click the Organizer icon to start the Organizer.
2. Click one of the six tabs in the notebook. The next few pages of this booklet show you the six sections of the Organizer.
3. Follow the steps in this booklet for the section you've turned to. Then try some of the suggested activities beneath each picture. Don't be discouraged if you can't do all of them; just look for the information you need in the Help system. (Detailed instructions on using Help appear on pages 10 to 11.)

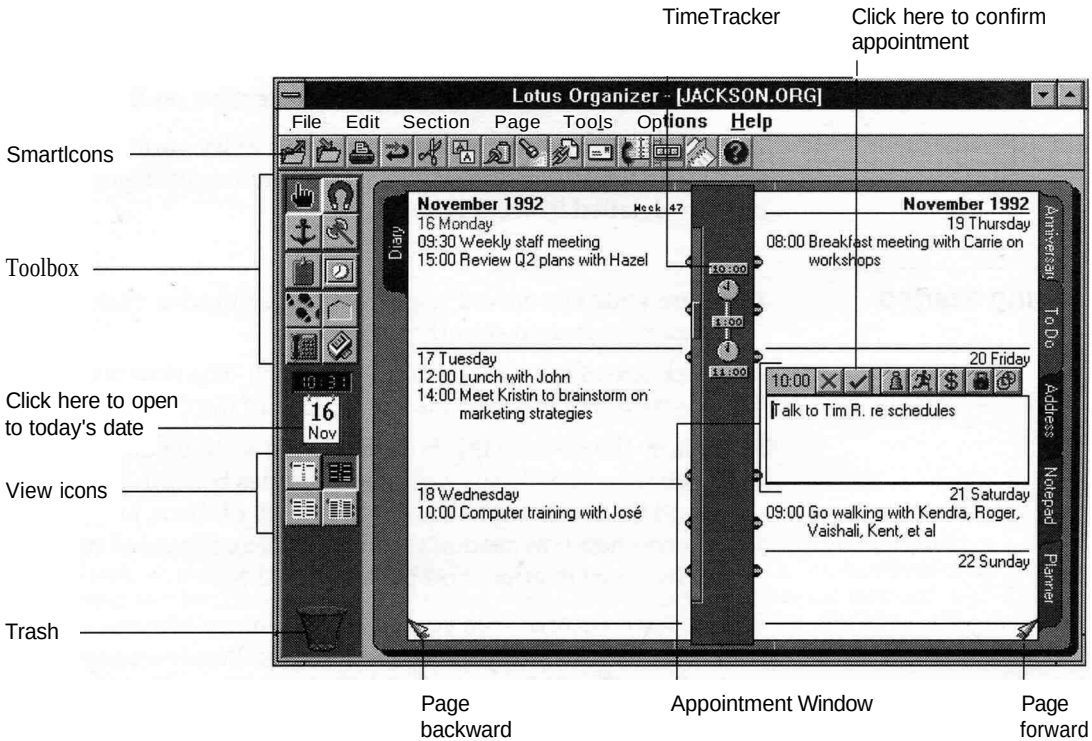
This booklet assumes that you are using a mouse; however, if you do not have a mouse, you can use the standard Windows keyboard equivalents. The Help system includes a section called "Keyboard Shortcuts" to help you out.

> **Note** As you build a notebook with information you want to keep, you should save it by choosing File/Save. To leave the Organizer, choose File/Exit.

Diary

Turn to the Diary section and follow these steps. The first page is a calendar of the current year.

1. Click today's date in the calendar (or the icon at the left of the screen) to see the page that includes today's appointments.
2. Click anywhere in the block with today's date to insert an appointment for today.
3. Click on a time and type the details of an appointment. Click when you finish.
4. Enter a few more appointments. Delete one by dragging it and dropping it in the Trash (wastebasket).



Experiment with some of these additional tasks.

- Move an appointment by dragging it and dropping it on another day.
- Set an alarm for an appointment using in the appointment window.
- Display your diary in different formats using the View icons.

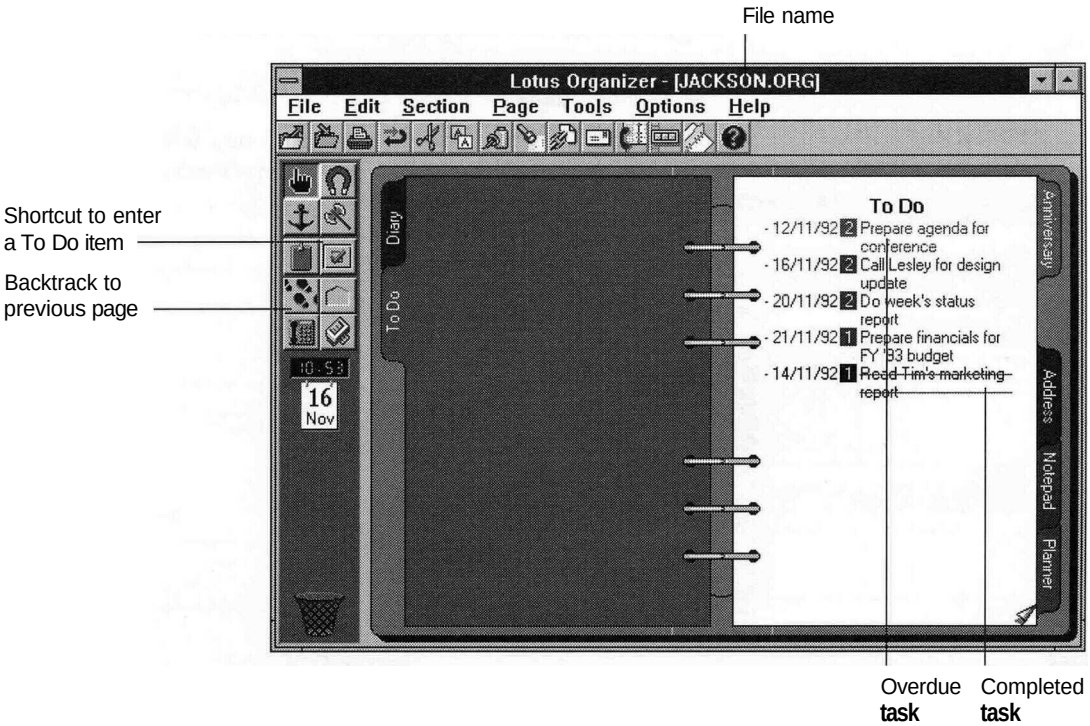
  Move an appointment to another page (select , click on the appointment, turn the page, and click the new date). When you finish, select the Toolbox.

  Change the start and end of your work day (choose Options/ Calendar and drag the clocks in the TimeTracker).

To Do

Turn to the To Do section and follow these steps.

1. Click anywhere on the To Do page to display the To Do dialogue box.
2. Type a task, and give it a start date, due date, and priority. Click the down arrow beside the date boxes to choose the appropriate date(s) from the pop-up calendar.
3. Choose OK to enter the task.



Experiment with some of these additional tasks. Be sure is selected in the Toolbox.

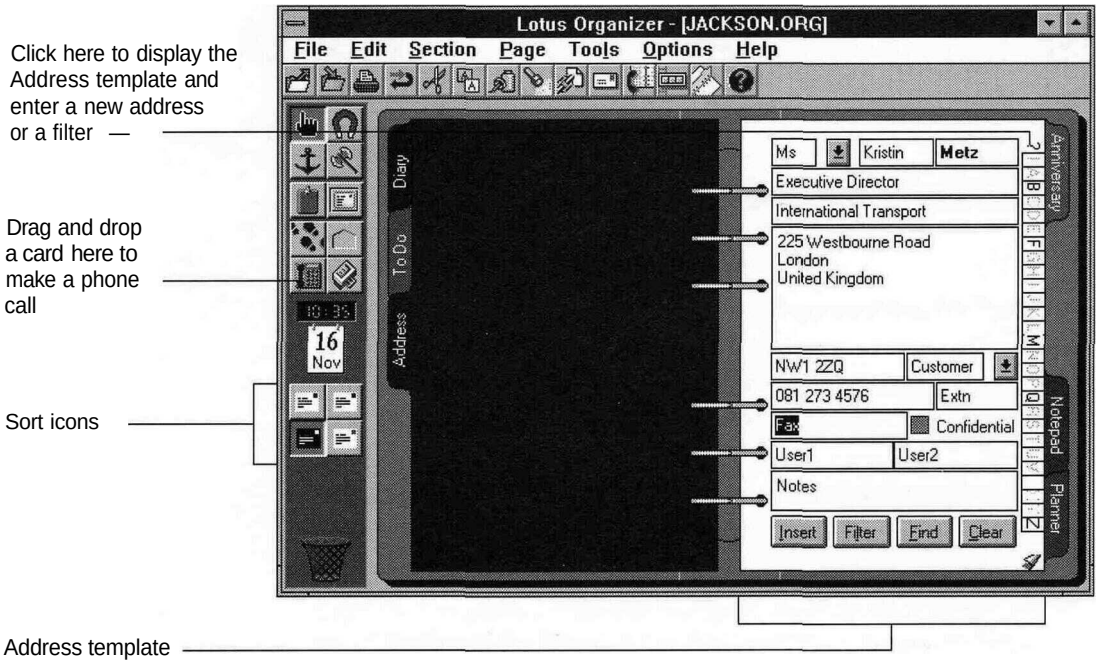
- Delete a task by dragging it to the Trash and dropping it in.
- Indicate that you have completed a task by choosing **Completed** in the To Do dialogue box.
- Enter an item with a due date that's in the past, and notice how the Organizer colour codes overdue tasks.

- Display your To Do items in the Diary by using Options/Diary, choosing Show, and selecting To Do.
- Create additional To Do sections (for example, for multiple projects) by using Options/Customise, selecting To Do, and choosing Add.

Address

Turn to the Address section and follow these steps. When you start, the Title field should be highlighted.

1. Type a title (e. g., Mr. or Ms.) for someone you want to enter.
2. Press TAB to move to the First Name field and type a first name. Continue entering information about the person, using TAB to move forward, and SHIFT-TAB to move backward.
3. When you finish entering information, choose Insert. The Organizer turns to the page with the new entry.
4. Click the ? index tab to display the address template. Enter information for a few more people. To delete an address record, drag and drop it in the Trash.



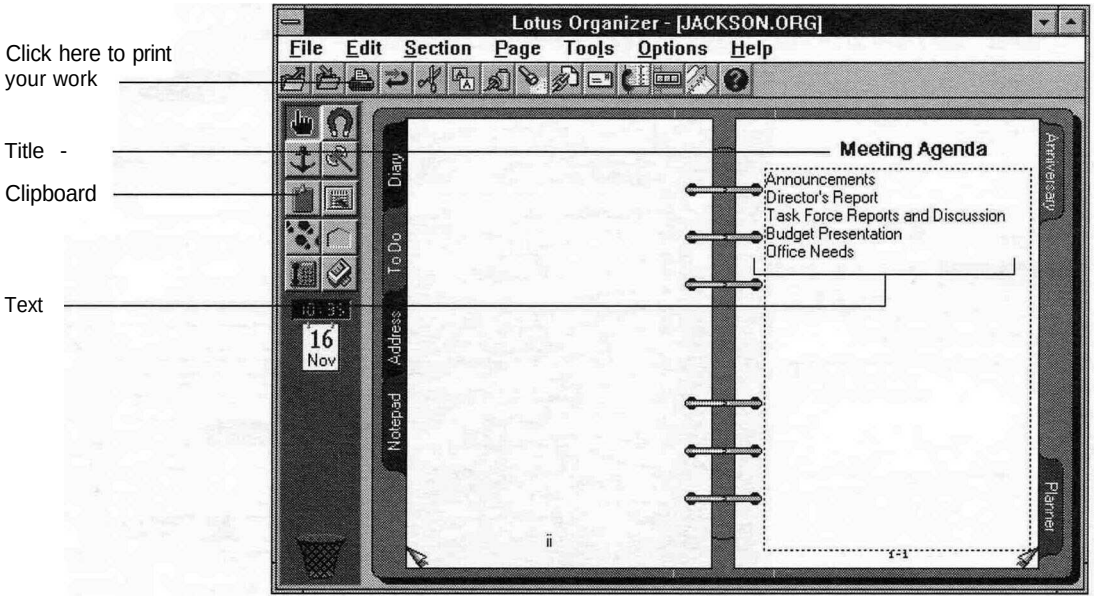
Experiment with some of these additional tasks.

- Edit one of the records you entered by clicking on the record you want to change, editing the text, and choosing Update.
- Display different information for each record using the View icons.
- See how you can make a telephone call if you have a Hayes®-compatible or autodial modem. (Drag and drop a card on in the Toolbox.)
- Filter the Address section by typing the information you want to match in the Address template (for example, only records with the postal code NW1 2ZQ) and choosing **Filter.** To clear the filter, choose Clear.
- Sort your address section by postal code using Options/ Address.

Notepad

Turn to the Notepad section and follow these steps.

1. Click anywhere on the Contents page of the Notepad to display the Notepad Page Insert dialogue box.
2. Give the page a title and choose OK.
3. Click the title on the Contents page to turn to the page with that title. Click anywhere on the page and type the text.
4. To save your text, click the page title.



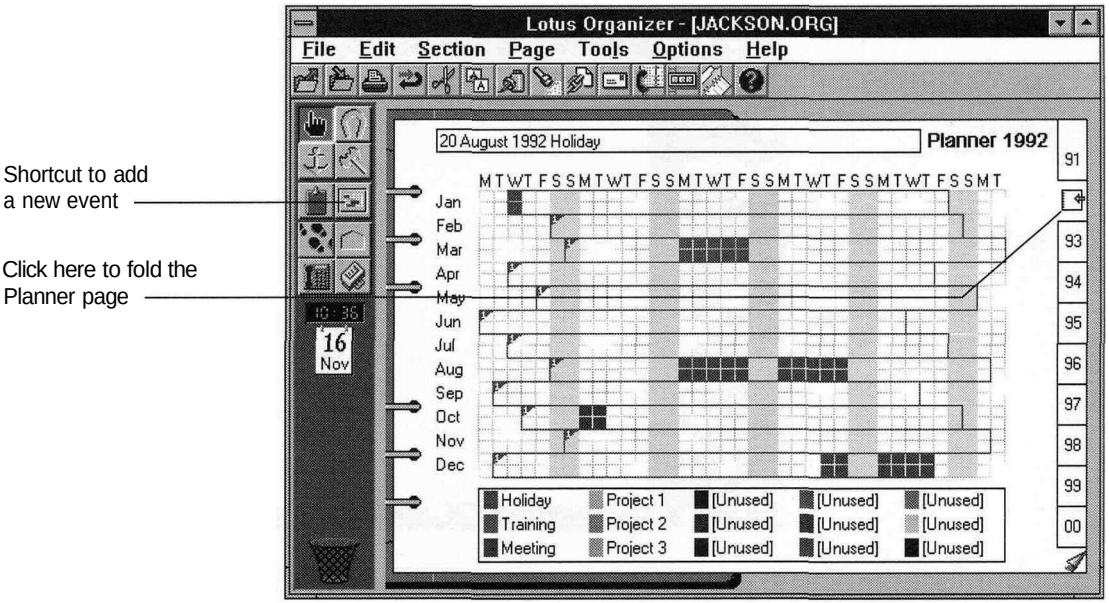
Experiment with some of these additional tasks.

- Insert several pages at once by specifying a number for Insert in the Page Insert dialogue box.
- Create chapters within a Notepad section by choosing Chapter as a page attribute when you insert a new page.
- Use in the Toolbox to pick up a page and move it to another place in the Notepad section.
- Copy a picture from another application and use the Windows clipboard to paste it into the Notepad. Specify Bitmap for Type and Clipboard for From in the Notepad Page Insert dialogue box.

Planner

Turn to the Planner section and follow these steps. When you start, you see a folded Planner page for the current year.

1. Click near the top right of the page to unfold the Planner.
2. Click the colour or pattern beside Holiday to schedule your holiday (the pointer changes to a block). Notice that the box in the top left corner displays the date as you move the pointer across the Planner.
3. Move the block to the first day of your holiday, and click and drag the block to the last day of your holiday.



Experiment with some of these additional tasks.

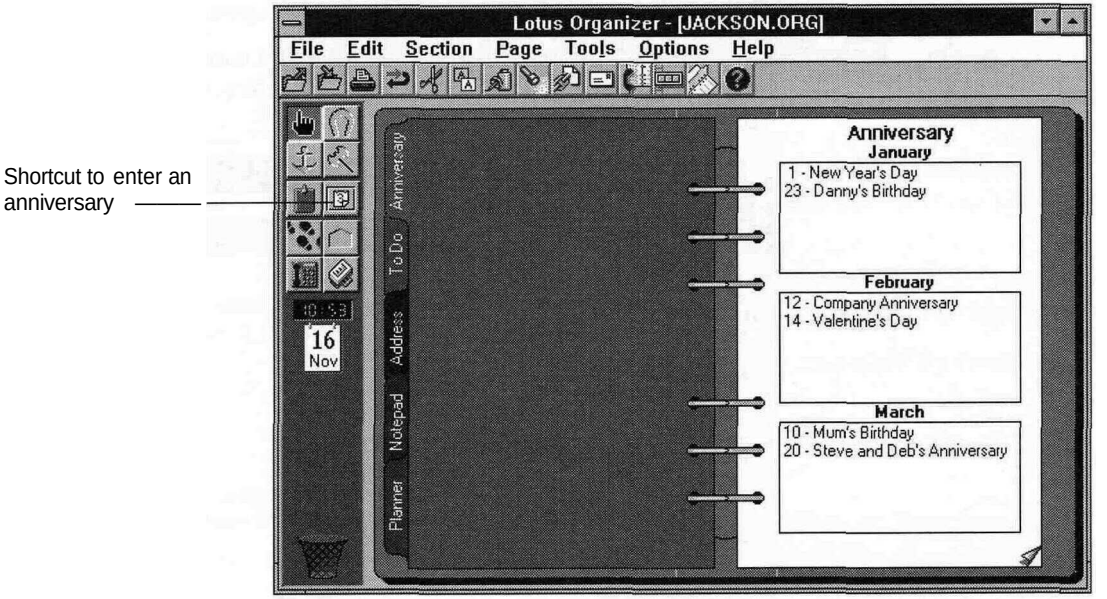
- Schedule a Training session or a Meeting.
- Schedule an event in a different year.
- Shorten or delete an event by dragging some or all of the blocks into the Trash.
- Display your Planner events in your Diary using Options/Diary and choosing **Show.**

- Customise some of the Unused blocks to represent other events you want to keep track of, such as sick days or conference days, by clicking the text and changing the name.
- Allow appointments scheduled in your Diary to appear as single lines in your Planner using Options/Planner. (Select Diary for Book time in and then select View Diary appointments.)

Anniversary

Turn to the Anniversary section, which allows you to keep track of yearly events such as birthdays, holidays, and once-a-year tasks.

1. Click on the month for which you want to enter an anniversary.
2. Enter the date for the anniversary, and then type the description.
3. Choose OK to enter the anniversary.



Experiment with these additional tasks.

- Edit an anniversary.
- Turn to the page in your Diary that corresponds to an anniversary by holding down SHIFT and clicking anywhere in the anniversary text.

Getting Help

As you've seen, the Organizer is a very powerful application, and so intuitive that you can learn to use most of it with this booklet. Some features may require a little more explanation than you have here. You can find all the details in the Organizer Help system.

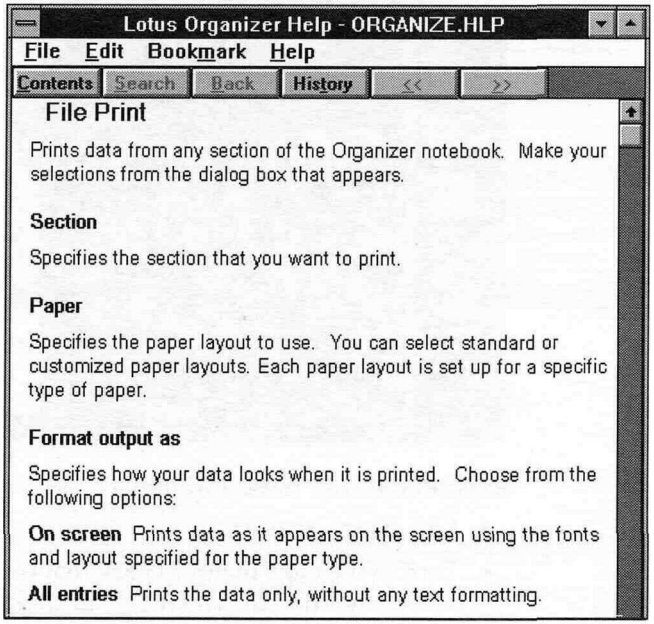
There are three ways to gain access to the Help system:

- Click
- Press F1/HELP.
- Choose the Help menu command.

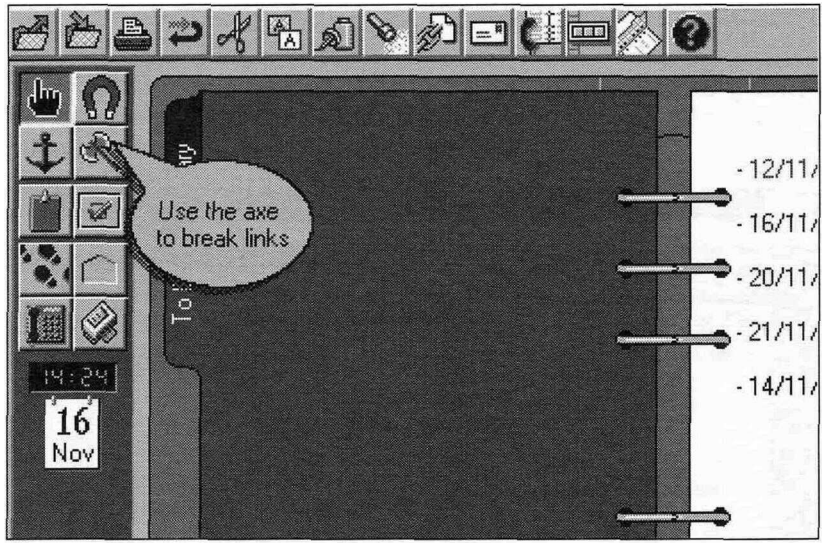
Help with What You're Doing

If you're in the middle of a task and you don't know how to continue, a good place to start is to click or press F1/HELP. This provides context-sensitive help for the task you are performing.

For example, if you are using the File/Print command and you want an explanation of the choices in the dialogue box, press FI/HELP and you will see the following Help screen.



If you see an icon that you don't understand, you can point to it and click the right mouse button to see an explanation.



Reference Information

If you have some time available and you want to learn more about the product by reading some of the documentation, you can browse the "How Do I?" help.

For example, if you want to learn about links, choose Help/How Do I? and then select "Cross-reference Information in the Organizer."

You can find complete information on each command by choosing Help/Commands from the Help menu.

You can see a list of keyboard and mouse shortcuts by choosing Help/Shortcuts.

You can search for specific information by choosing Search on the Help screen.

Further Exploration

This section teaches you how to use a few of the more sophisticated features of the Organizer.

Linking Information

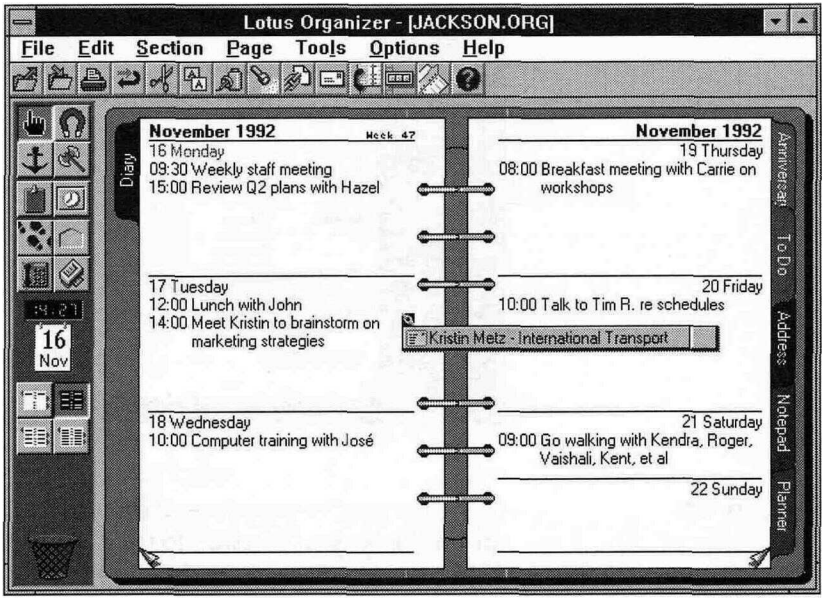
During the course of a day, you work with all kinds of interrelated information. You can use the power of the Organizer to cross- reference, or link, discrete pieces of information. When you use a link, you can turn directly to any page in the Organizer that contains related information.

To see how a link works, enter someone's name and phone number in your Address section, and then enter an appointment with that person in your Diary. Follow the steps below to link the person's phone number to the appointment.

1. Click in the Toolbox.
2. Move the mouse pointer over the text of the appointment so it changes to an anchor pointer.
3. Click the anchor pointer over the text of the appointment, so it changes to an anchor and chain.
4. Go to the Address section and turn to the person with whom you have the appointment.
5. Click on the entry to complete the link. The appears in the right corner to indicate the link.
6. When you have finished creating links, click in the Toolbox to remove the anchor pointer.

To use the information in the link, go back to the appointment and point to . Hold the mouse button and highlight the name that appears.

The Organizer automatically turns to that person in the Address section. You can create multiple links to cross-reference all of your important information.



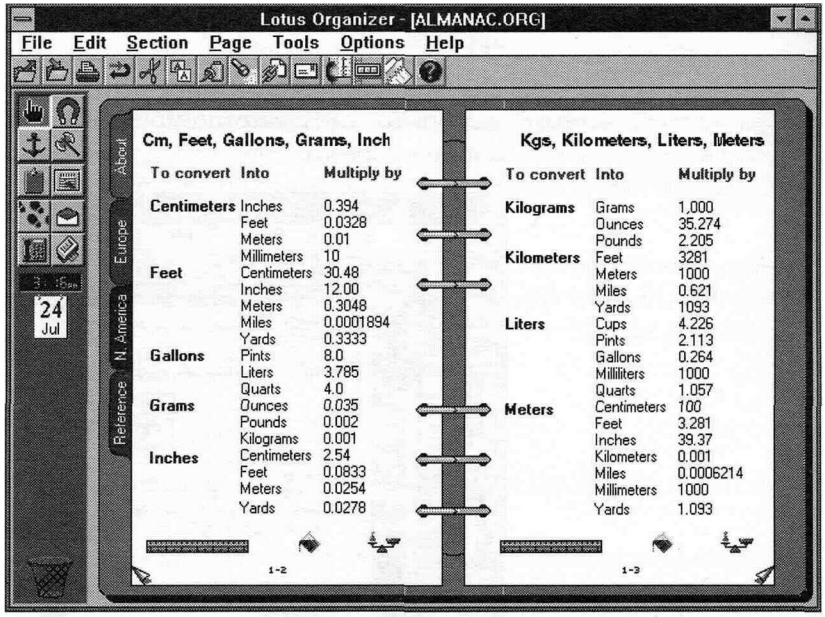
Customising Your Notebook

The Organizer lets you change the appearance and structure of your notebook. You can modify such things as the order of the sections in the notebook, the colour of section tabs, and the section names. You can delete, add. and rename sections.

Suppose you want to add a separate section where you keep only addresses and phone numbers for personal friends.

1. Choose Options/Customise, and choose Add.
2. Choose Address for Based on and give the new section a name (for example, Personal Addresses). Click OK.
3. If you want to change the colour for the tab, click the arrow at the bottom of the Customise Organizer dialogue box and choose a new colour.
4. Click OK to add the new section.

For example, a creative use of Notepad sections lets you design an almanac.



Moving On

Now that you've experimented with the Organizer and explored on-line Help, you're ready to use the Organizer to transform your paper system into a powerful, on-screen personal information manager.