

# Lotus Organizer 2.1 Deployment Questions and Answers for Group Scheduling with Lotus cc:Mail

This document provides answers to commonly asked deployment questions for administrators who use Lotus Organizer® Release 2.1 for group scheduling with Lotus cc:Mail™. It is not intended for administrators who use Organizer™ for Windows™ for single-server scheduling, shared calendaring with no group scheduling, or Lotus SmartSuite® administrators.

This document arranges deployment questions for Organizer 2.1 in the following categories:

- Upgrading from Organizer Release 1.1 group scheduling for cc:Mail to Organizer 2.1
- Planning and deploying Organizer scheduling agents
- Configuring Organizer 2.1 for your network
- Determining where to store .OR2 files
- Optimizing performance for Organizer 2.1 on your network
- Managing Organizer 2.1 files
- Using Organizer 2.1 when disconnected from the LAN

This document also includes detailed steps to follow and cross-references to Lotus Organizer 2.1 *Administrator's Guide* for more information.

## Upgrading from Organizer 1.1 group scheduling for cc:Mail to Organizer 2.1

### **Q. What can users expect when scheduling between Organizer 1.1 and 2.x users?**

- A.** Organizer 2.x users can perform a real-time search of free-time and busy-time information for Organizer 1.1 for Windows and Lotus Organizer Scheduling for the Macintosh™ Release 1.1 users. Organizer 2.x users can schedule meetings with Organizer 1.1 for Windows and Lotus Organizer Scheduling for the Macintosh Release 1.1 users.

Organizer 1.1 for Windows and Lotus Organizer Scheduling for the Macintosh Release 1.1 users can't perform a real-time search of free-time and busy-time information for Organizer 2.x users. Organizer 1.1 for Windows and Lotus Organizer Scheduling for the Macintosh Release 1.1 users can schedule meetings with Organizer 2.x users.

Organizer 1.1 for Windows and Lotus Organizer Scheduling for the Macintosh Release 1.1 users don't receive attachments sent with meeting notices by Organizer 2.x users.

### **Q. How do you upgrade from Organizer 1.1 group scheduling for cc:Mail to Organizer 2.1?**

- A.** Upgrading from Organizer 1.1 group scheduling for cc:Mail to Organizer 2.1 consists of the following phases:
- Planning the upgrade
  - Installing Organizer 2.1, Lotus Organizer Administration 2.1, and Lotus Organizer Scheduling Agent 2.1 for cc:Mail
  - Completing tasks in Organizer 1.1 before upgrading users to Organizer 2.1
  - Using Lotus Organizer Administration 2.1 to add Organizer 2.1 scheduling information

- Converting the Organizer 1.1 group-scheduling user file with Organizer 2.1 client
- Upgrading Organizer 1.1 rooms and resources
- Converting Organizer 1.1 rooms and resources with Organizer 2.1 client

You (the administrator) **must** complete all these phases **except** converting the Organizer 1.1 user file. You **don't** need to upgrade Organizer 1.1 file server entries. They are identical for Organizer 2.1.

### Planning the upgrade

Before you upgrade from Organizer 1.1 to 2.1, keep the following points in mind:

- Plan how you will upgrade. Inform users of your plan, what will occur and what they need to do.
- Upgrade users in groups (for example, by post office or by file server), unless your organization is ready for a concurrent upgrade. Concurrent upgrades are usually possible only in small organizations (or very controlled ones). Upgrading concurrently however, removes the need to separately maintain DOS scheduling agents for Organizer 1.1, and Windows or OS/2 scheduling agents for Organizer 2.1.
  - If you have Organizer 2.x and 1.1 users who will use group scheduling, Organizer 2.x users use .OR2 files and the 1.1 users use .ORG files. If an Organizer 1.1 user upgrades to Organizer 2.1 and converts the .ORG file to an .OR2 file, the resulting .OR2 file can no longer be used with Organizer 1.1.
  - When naming a room or resource that will be used by both Organizer 1.1 and Organizer 2.x users, set up the room or resource in Organizer 1.1 (with the DIRADMIN utility) so that an Organizer 1.1 (.ORG) file is created. Creating an .ORG file lets both Organizer 1.1 and 2.1 users display the free and busy times of the room or resource.
    - A file server can store .OR2 and .ORG files. To facilitate Organizer and network administration, it is recommended that you keep the Organizer files for the different versions in separate directories.
    - One scheduling agent **cannot** process meeting notices for both Organizer 1.1 and 2.x users. A **separate** scheduling agent is required for Organizer 1.1 users and resources, and Organizer 2.x users, rooms, and resources. In a mixed environment with Organizer 1.1 and 2.x users, you must maintain **both** Organizer 1.1 and 2.x\_ scheduling agents.

### Installing Organizer 2.1, Lotus Organizer Administration 2.1, and Lotus Organizer Scheduling Agent 2.1 for cc:Mail

1. Make sure you have the required hardware and software for all Organizer components.

See "System requirements," in Chapter 1 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

2. Complete the Organizer mail-based scheduling installation checklist.

See "Organizer mail-based scheduling installation checklist," in Chapter 3 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

3. Install Organizer 2.1 and the Lotus Organizer Administration 2.1 program files to a shareable file-server drive in a new directory.

See "Using Install" and "Specifying file server information," both in Chapter 3 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

After installation is complete, two icons appear on your desktop: Lotus Organizer Node Install 2.1

and Lotus Organizer Administration 2.1.

4. Install Lotus Organizer Scheduling Agent 2.1 to the file server or a dedicated PC and set up scheduling-agent mailboxes.

See "What does Lotus Organizer Scheduling Agent 2.1 do?", in Chapter 2, and "Installing Lotus Organizer Scheduling Agent 2.1 for OS/2" or "Installing Lotus Organizer Scheduling Agent 2.1 for Windows," in Chapter 3 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

5. (Optional) Add Lotus Organizer Scheduling Agent 2.1 icon to a Program Manager group on your (administrator's) computer.

This step is for troubleshooting purposes and isn't required.

### **Completing tasks in Organizer 1.1 before upgrading users to Organizer 2.1**

- Inform all Organizer 1.1 users you will upgrade.
  - Instruct all Organizer 1.1 users that you will upgrade to process all meeting notices in their cc:Mail inbox. (It's not possible to process meeting notices in cc:Mail inboxes after Organizer 1.1 users upgrade because Organizer 2.x installation removes the .ORS association within File Manager and, unlike Organizer 1.1, users can't start Organizer 2.x with an .ORS file.)
  - Run Organizer 1.1 Utilities to check and compact all the .ORG files you plan to upgrade *before* you convert them to .OR2 files. (See "Using ORGUTILS in Batch Mode," in Chapter 4 of the *cc:Mail Administrator's Guide* for Lotus Organizer Release 1.1, for more information.)
  - Back up all Organizer (.ORG) files.

### **Using Lotus Organizer Administration 2.1 to add Organizer 2.1 scheduling information**

You use Lotus Organizer Administration 2.1 to add Organizer 2.1 scheduling information to the Comments field in cc:Mail directory entries.

1. Log in to Lotus Organizer Administration 2.1 as the cc:Mail post office with the post office password.

If you don't log in as the post office, the appropriate rights -- to modify or create entries -- won't be granted. The access area in the status bar of the Lotus Organizer Administration 2.1 window displays a key for read-write access to the cc:Mail directory; if a pair of glasses appears, you (the administrator) have read-only access to the post office.

2. Create an entry for each Lotus Organizer Scheduling Agent 2.1 for cc:Mail.

See "Creating an entry for Lotus Organizer Scheduling Agent 2.1 for cc:Mail," in Chapter 4 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

**Note** If you have both Organizer 1.x and 2.x users on your network, you need to maintain both the Organizer 1.x and 2.x scheduling agents and they must have unique names. You can run the Organizer 1.1 scheduling agent for DOS and Lotus Organizer Scheduling Agent 2.1 for OS/2 on the same OS/2 system to eliminate the need for additional hardware.

3. Select the user entries whose scheduling information you want to upgrade.

To select multiple user entries in sequence, click the first entry and press and hold SHIFT while you click the last entry you want to select. To select multiple user entries out of sequence, press and hold CTRL while you click each entry.

To select user entries that share the same file server and volume, or directory information, use the Select Specific dialog box. (See "Selecting entries that match specific criteria," in Chapter 4 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.)

All entries with icons next to the entry names are Organizer 2.x users, rooms, and resources that are configured correctly. (See "The Lotus Organizer Administration 2.1 window," in Chapter 4 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.)

4. Choose Edit - Edit Selected.
5. Select Organizer user from the Organizer entry type drop-down box.
6. Enter your updated file server and volume, and directory information in the appropriate text boxes.

If the network is peer-to-peer (such as IBM® LAN Server), don't enter text in the Server\volume text box.

**Note** The Keep previous name (mixed filenames) option uses the existing names of the .ORG files with the new .OR2 files. It is the only Organizer file name option for multiple users during an upgrade from Organizer 1.1.

7. Enter the name for the scheduling agent in the appropriate text box.
8. Click OK.

Lotus Organizer Administration 2.1 changes the extension for the former Organizer 1.1 users to .OR2 and adds user icons next to these entries. The .ORG file isn't converted, just renamed so that you can open it from Organizer 2.1 client.

### **(Instructions for users) Converting the Organizer 1.1 group-scheduling user file with Organizer 2.1 client**

*Each user must* convert the Organizer group-scheduling 1.1 file with the Organizer 2.1 client.

1. Run Node Install to install Organizer mail-based scheduling on your PC.

See "Installing Organizer," in Chapter 1 of Lotus Organizer 2.1 *Exploring Organizer*, for more information.

2. Start Organizer 2.1 and enter your cc:Mail password.
3. Choose File - Open.
4. Click the Name tab to open a file associated with your user name.
5. Select the file to open.
6. Click OK.
7. If the file you selected has a password, enter the password and click OK.
8. Click Continue to convert the Organizer 1.1 file to an .OR2 file.

9. Click OK.
10. Click Yes to always open the new .OR2 file when Organizer starts.

Organizer saves the .OR2 file as well as the original .ORG file.

### **Upgrading Organizer 1.1 rooms and resources**

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

In order for Organizer 1.1 users to continue to do free-time searches for rooms and resources, you should upgrade them after users. The following procedure demonstrates how to upgrade an Organizer 1.1 room entry configured as an Organizer 1.1 resource. Use a similar procedure for upgrading an entry for an Organizer 1.1 resource.

1. In the cc:Mail ADMIN program, change the location status of Organizer 1.1 rooms and resources from "R" to "L."

Users can't log in to cc:Mail from a room or resource as long as it has a location status of "R."  
(See the cc:Mail administrator's guide for information on changing location status.)

2. Log in to Lotus Organizer Administration 2.1 as the cc:Mail post office with the post office password.
3. Select the Organizer 1.1 room or resource entry whose scheduling information you want to upgrade.

To select all rooms, select Room as the Organizer file type in the Select Specific dialog box.

To select all resources, select Resource as the Organizer file type in the Select Specific dialog box.

(See "Selecting entries that match specific criteria," in Chapter 4 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.)

4. Choose Edit - Edit Selected.
5. Select the Organizer entry type from the drop-down box.

Select Room or Resource.

6. Enter your updated file server and volume, and directory information in the appropriate text boxes.
7. Enter the name for the scheduling agent for the room or resource.
8. Click OK.

Lotus Organizer Administration 2.1 changes the extension for the former Organizer 1.1 room from .ORG to .OR2, and adds the room or resource icon next to the entry. The .ORG file is not converted, just renamed so that the user can open it from Organizer 2.1.

9. (Room entries only) In order for the room entries to be displayed, you must use cc:Mail ADMIN to create a public mailing list named "#\*ROOMS" that contains these entries.

For more information on creating public mailing lists, see cc:Mail administrator's guide.

### **Converting Organizer 1.1 rooms and resources with Organizer 2.1 client**

You **must** convert the Organizer 1.1 rooms and resources with Organizer 2.1 client.

1. Start Organizer 2.1 and enter the cc:Mail password for the room or resource.
2. Choose File - Open.
3. Click the Name tab to open a file associated with the room or resource.
4. Select the file to open.
5. Click OK.
6. If the file you selected has a password, enter the password and click OK.
7. Click Continue to convert the Organizer 1.1 file to an .OR2 file.
8. Click OK.
9. Click No to not open the new .OR2 file when Organizer starts.

Organizer saves the .OR2 file as well as the original .ORG file.

## **Planning and deploying Organizer scheduling agents**

### **Q. Can you use Lotus Organizer Scheduling Agent 2.x for Organizer 1.1 group-scheduling users?**

**A.** No. Organizer 2.x scheduling agents can **only** process meeting notices for Organizer 2.x (.OR2) files, and Organizer 1.1 scheduling agents can **only** process meeting notices for Organizer 1.1 (.ORG) files. In a mixed environment with Organizer 1.1 and 2.x, you must maintain **separate** scheduling agents for 1.1 users and resources, and 2.x users, rooms, and resources.

### **Q. What are the similarities between Lotus Organizer Scheduling Agent 2.x and Organizer 1.1 Scheduling Agent?**

**A.** Lotus Organizer Scheduling Agent 2.x and Organizer 1.1 scheduling agent have the following similarities:

- Both scheduling agents process all "automatically applied" updates, such as an unmonitored conference room.
- Both scheduling agents maintain a log file with various levels of verbosity for errors and informational messages.

### **Q. What are the differences between Organizer 2.x scheduling agents and Organizer 1.1 scheduling agent?**

**A.** Lotus Organizer 2.x scheduling agents and Organizer 1.1 scheduling agent have the following differences:

- Organizer 2.x scheduling agents run in Windows and OS/2; Organizer 1.1 scheduling agent runs in DOS **only**.
- Organizer 2.x scheduling agents for cc:Mail can run on a separate OS/2 system connected to the network or as an OS/2 task on the cc:Mail Router PC. You can run multiple scheduling agents for OS/2 as multiple tasks on a single OS/2 system.
- You **can't** run Organizer 2.x scheduling agents for cc:Mail as a task on the cc:Mail Router program, but you **can** run Organizer 1.1 scheduling agent for cc:Mail as a task on the cc:Mail Router program.
- Organizer 2.x scheduling agents for cc:Mail poll only **one** scheduling-agent mailbox at a time, and each scheduling agent is controlled by a separate ORG2.INI file. With Organizer 1.1 scheduling agent, you could create a DOS batch file that runs on the cc:Mail DOS Router PC. The batch file controls **multiple** scheduling-agent processes and polls multiple scheduling-agent mailboxes.

**Note** Because the Lotus Organizer Scheduling Agent 2.x can be run in a multi-tasking environment (OS/2), multiple scheduling-agent processes can poll multiple mailboxes, often more efficiently than a batch file used to control the Organizer 1.1 scheduling agent for DOS.

- Organizer 2.x scheduling agents for cc:Mail write meeting information directly into the destination .OR2 file, rather than sending cc:Mail messages with .ORS file attachments. (A user can still elect to receive e-mail notifications, in addition to receiving messages in the .OR2 file.)
- Organizer 2.x scheduling agents for cc:Mail gather real-time statistics and write them to a log file (AGENT000.LOG).
- You can run Organizer 2.x scheduling agents for OS/2 on a multi-session Router PC.
- Organizer scheduling agents 2.1 for OS/2 are 32-bit applications.
- Organizer 2.x scheduling agents for OS/2 can run up to eight scheduling agents at a time; however, each scheduling agent requires a separate ORG2.INI file.

**Q. How many Organizer users should you have for each scheduling agent?**

**A.** Because usage patterns and network configurations vary from company to company, there is no standard rule for the number of users for each scheduling agent. Determining the number of Organizer users for each scheduling agent is based on how your users will use Organizer, your network architecture, performance goals, and administrative considerations.

To estimate this number, consider the following objectives in a scheduling-agent deployment strategy:

- Minimize hardware investment.
- Achieve required service levels.
- Make effective use of LAN/WAN hardware and software.
- Minimize administrative costs.
- Minimize the impact on your existing cc:Mail environment.

You can use corporate e-mail statistics and the cc:Mail Router log to help you determine usage patterns and peak usage periods for your network. Also, if you already have a scheduling system, such as IBM PROFS®, you have some data on scheduling use.

In addition, you can contact a variety of different types of users in your company to understand how they will use Organizer. Ask users the following questions:

- What types of meetings will you schedule with Organizer 2.1 (all meetings or just meetings in conference rooms)?
- How many meetings will you schedule daily?
- What are your expectations about the delivery time for meeting notices?

After reviewing the answers to these questions and your company's usage patterns, you can estimate the number of meeting notices each day and assign Organizer users to scheduling agents. You may need to adjust this estimate up or down as you evaluate Organizer performance and your users gain experience using Organizer.

**Q. How many scheduling-agent mailboxes should you have?**

- A.** The number of scheduling-agent mailboxes makes no difference to Organizer. This decision is based on the number of invitees for meetings, how you configure the scheduling agent, and what's best for Organizer and LAN administrators. See "Guidelines for configuring a scheduling agent," in Chapter 2 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

**Q. Where should you install scheduling-agent mailboxes?**

- A.** The location of scheduling-agent mailboxes makes no difference to Organizer. The only restriction is that the PC, or cc:Mail post office that the scheduling-agent process runs on, must be able to log into its mailbox to receive and process meeting notices.

The mailboxes can be assigned to any cc:Mail post office. This decision should be made based on how you configure the scheduling agent and what's best for Organizer and LAN administrators. See "Mail-based scheduling examples for cc:Mail," in Chapter 2 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

As a benchmark, start with one scheduling agent mailbox for each cc:Mail post office. Then, make it a standard part of setting up each additional cc:Mail post office. You may need to adjust this benchmark up or down as you evaluate Organizer performance.

**Q. How should you name scheduling-agent mailboxes?**

- A.** When you configure new scheduling agents, use standard naming conventions and a sequential numbering scheme. Standard naming conventions will help to facilitate locating and administering scheduling agents. For example, if you enter \_ (underscore) as the first character in the scheduling-agent name and increment the number for each new scheduling agent by one, Organizer sorts the scheduling agents to the bottom of the cc:Mail post office when they are displayed in the Lotus Organizer Administration 2.1 window and the Name tab of the File Open dialog box in Organizer 2.1.

For example, you can name scheduling agents with the following names:

\_Org2Agent1  
\_Org2Agent2  
\_Org2Agent3

**Q. How do you install the stand-alone scheduling agent for cc:Mail?**

- A.** Run the scheduling agent for Windows Install program or the scheduling agent for OS/2 Install program. See "Installing Lotus Organizer Scheduling Agent 2.1 for OS/2" or "Installing Lotus Organizer Scheduling Agent 2.1 for Windows," in Chapter 3 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

**Q. What do you do if the scheduling agent doesn't process meeting notices?**

- A.** If the scheduling agent doesn't process meeting notices, try these troubleshooting techniques:
- If the scheduling agent won't run at all, it's likely that you've configured it incorrectly. This is the **most common** source of scheduling-agent problems. Follow the steps in "Creating an entry for Lotus Organizer Scheduling Agent 2.1 for cc:Mail," in Chapter 4 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.
  - Be sure that you installed the Vendor Independent Messaging (VIM) runtime toolkit. Organizer



2.x scheduling agents and Organizer 2.x use VIM Dynamic Link Libraries (DLLs) to access cc:Mail directories. There are different sets of VIM DLLs required for OS/2 and Windows. See "System requirements," in Chapter 1 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

- For Organizer 2.1 group scheduling with cc:Mail, users must use the VIM DLLs included with their VIM-enabled applications (for example, cc:Mail Mobile for Windows Release 2.1).

If problems occur after the scheduling agent is running, ask yourself the following questions:

- Can the user invite someone?
- Does the message get to the appropriate scheduling agent?
- Does the scheduling agent process the meeting notices?
- Are the meeting notices routed to the appropriate users?
- Do the meeting notices arrive in the users' Organizer files?
- Is the correct version of the cc:Mail VIM DLL files loaded on the scheduling agent's PC?

See "What does Lotus Organizer Scheduling Agent 2.1 do?," in Chapter 2 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

## Configuring Organizer 2.1 for your network

### Q. Can cc:Mail users use LMEF Release 3.1 to schedule meetings with Notes users with distinguished names?

- A. There are known problems with Organizer 2.01 and LMEF 3.1 when scheduling meetings between cc:Mail users and Notes users with distinguished names (Notes Release 3.2 or later). These known problems were resolved in Organizer 2.1.

In order for cc:Mail users to schedule meetings successfully with Notes users with distinguished names you must complete the following procedure:

1. Install LMEF 3.1 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 FAN field. When the LMEF entry is set to 0, Organizer doesn't read or scan the FAN field. 0 is the default.

**Tip** Because you must add the LMEF entry to the [Scheduling] section manually, you should modify the ORG2.INI file with this entry after you complete a file server install. Then, users will be set up with the proper LMEF support when they complete a node installation.

Organizer 2.01 and LMEF 3.1 known problems were resolved by having cc:Mail return abbreviated names for Notes entries so that mail is routed correctly to a Notes user from cc:Mail. For example, if John Jones is listed in the Notes Name & Address Book as John Jones/Finance/Acme, LMEF puts this full distinguished name in the cc:Mail FAN field and lists John as Jones, John in the Name field in the cc:Mail directory.

This fix required reading in the cc:Mail FAN field and looking for an @ (at sign) to signify a Notes address. If LMEF reads an @ and a . (period) is not found after the @, it abbreviates the portion of

the address including and after @. LMEF then returns the portion of the address before the @ after it has been abbreviated as the user's Organizer name in the cc:Mail directory. (LMEF eliminates CN=, OU=, and <key>=.)

If LMEF reads an @ and finds a . (period) after the @, the entry is treated as if it were not a Notes entry. The name in the Name field is used, after the name has been adjusted, if necessary. (Adjusting refers to selecting names with a comma in them and inverting them (for example, <Last>, <First> becomes <First> <Last>.)

There are some potential scenarios where interoperability between Notes users with distinguished names and user names in the cc:Mail directory is not supported:

- If LMEF is installed not to use the cc:Mail FAN field. If the cc:Mail FAN field is set to No, Organizer can't derive the abbreviated name for a Notes user with a distinguished name.
- If the common name portion of the first entry in the Full Name field for a Notes user's Person document name is not the same as the Name field in the cc:Mail directory, interoperability fails. For example, if the first entry in the Full Name field is John Jones/Finance/Acme, then the common name portion is John Jones. If the entry in the Name field in the cc:Mail directory is anything other than John Jones or Jones, John, a cc:Mail user can't display free-time and busy-time information for or send e-mail notifications to that Notes user.

**Tip** If two users have the same common name, you may choose to manually enter a slightly different name and set up the FAN to correctly route meeting notices to the correct user. For example, if a new user named John Jones/Sales/Acme was added to the company's Notes Name & Address Book, you could create a new entry in the cc:Mail directory like Jones, John (Sales) whose FAN field is NOTESPO CN=John Jones/OU=Sales/O=Acme@ACME (if John Jones belongs to the ACME domain). CN stands for Common Name; OU stands for Organizational Unit; and O stands for Organization.

- If the full name for a Notes user is more than 126 characters.
- If another application places data in the FAN field for non-Notes users that contains the @.
- If a Notes domain name contains a . (period).

## Determining where to store .OR2 files

### **Q. What are the advantages for using centralized file servers for .OR2 files?**

- A.** Using centralized file servers for .OR2 files has the following advantages:
- Locating .OR2 files on centralized file servers decreases overall network traffic.
  - If the file server crashes, only Organizer is affected.
  - When batch utilities for Organizer administration are in place, it is easier for you to maintain .OR2 files.

### **Q. What are the disadvantages for using centralized file servers for .OR2 files?**

- A.** Using centralized file servers for .OR2 files has the following disadvantages:
- Costs for additional hardware and software for file servers.
  - Single-point-of-failure for Organizer.

### **Q. What are the advantages for using distributed file servers for .OR2 files?**

- A.** Using distributed file servers for .OR2 files has the following advantages:

- You won't need new hardware and software for file servers.
- You can create Organizer directories on existing file servers (LAN infrastructure remains unchanged).
- You can more easily maintain .OR2 files when batch utilities for Organizer administration are in place.

**Q. What are the disadvantages for using distributed file servers for .OR2 files?**

- A.** Using distributed file servers for .OR2 files has the following disadvantages:
- Existing file servers may not be able to handle the additional network traffic that is created by Organizer users.
  - Existing file servers may require additional disk space (depending on the number of Organizer users and their shared calendaring and group-scheduling patterns).
  - It may be more difficult for you to securely set up Organizer users (for example, setting up directories so that users have the correct access rights to Organizer directories).
  - It may require additional administration to maintain Organizer files if users change home file servers or post offices.

If the performance of existing file servers is adversely affected by the number of Organizer users, you can reduce the number of Organizer users on that file server until network traffic is no longer an issue. This recommendation would most likely result in a higher file-server CPU use and would result in the lowest total hardware cost to your company.

## Optimizing performance for Organizer 2.1 on your network

**Q. How many Organizer users should you have on each file server?**

- A.** Because Organizer usage patterns and network architectures vary from company to company, there is no standard rule for how many Organizer users you should have on each file server.

For cc:Mail, there are no restrictions on the number of post offices for each file server and many cc:Mail organizations put multiple post offices on each file server. A reasonable starting point is one post office for each file server or 75 to 125 Organizer users for every post office. However, if you dedicate an OS/2 system to running the scheduling agent (as an agent hub), you can run up to eight Organizer 2.x scheduling agents for OS/2 on a multi-session Router PC and each scheduling agent can service hundreds of users spread across many cc:Mail post offices. You may need to adjust this starting point up or down as you evaluate Organizer performance.

**Q. How can you anticipate shared calendaring and group scheduling problems before they occur?**

- A.** Follow these general guidelines:
- Monitor the scheduling-agent statistics and log file (AGENT000.LOG) to determine the number of meeting notices the scheduling agent can process. (See "Guidelines for configuring a scheduling agent," in Chapter 2, and "Maintaining the ORG2.INI file," in Chapter 4 of *Lotus Organizer 2.1 Administrator's Guide*, for more information.)
  - Use cc:Mail View™ to monitor the number of messages in the scheduling-agent mailboxes and set appropriate service thresholds.

**Q. What are the variables that affect network performance?**

- A.** Because Organizer uses your existing cc:Mail directory and mail transport, if your current mail-routing

performance is satisfactory, Organizer should work well. If mail routing is unsatisfactory, resolve those issues **first** before attempting to optimize Organizer performance.

The following factors affect performance:

- Lotus Organizer Scheduling Agent 2.1 configuration information (ORG2.INI), especially polling parameters set by the CheckNotices entry. (See "Maintaining the ORG2.INI file," in Chapter 4 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.)
- cc:Mail post office configuration (hub-and-spoke, peer-to-peer). (See "Notes topologies and cc:Mail configurations," in Chapter 2 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.)
- File server hardware: CPU, memory, network interface card, and disk subsystem.
- Type of network operating system and its configuration on the file server.
- Network protocol.

## Managing Organizer files

### **Q. Can users compress the size of an .OR2 file and how often should they do it?**

- A.** Yes, users can use the archive feature to move older information from their .OR2 file and compact their files. In the Organizer 2.1 client, choose File - Archive and click Help to display the steps for archiving sections and compacting files.

While .OR2 file sizes vary, it is recommended that you encourage your users to archive and compact their files at least once a month to conserve disk space on the network and streamline their Organizer files.

### **Q. What are the advantages for storing entire .OR2 files on the network?**

- A.** Storing entire .OR2 files is required to support real-time view of free-time and busy-time information. Storing entire .OR2 files on the network has the following advantages:
- Backing up of .OR2 files is done according to the normal network backup schedule
  - Provides full assistant and shared calendaring support
  - Permits links between sections of one or multiple Organizer files
  - Lets other users include any sections that you desire
  - Encourages use of all Organizer features, not just Calendar

### **Q. What are the disadvantages for storing entire .OR2 files on the network?**

- A.** When you store entire .OR2 files on the network, response time is slower and show-through from other files makes Organizer run more slowly.

## Using Organizer 2.1 when disconnected from the LAN

### **Q. How can users manage their Organizer files when they are sometimes disconnected from the LAN?**

- A.** The procedure below refers you to the section in the Organizer 2.1 client Help file for complete instructions on what to tell users who need to manage their Organizer files on a notebook computer when they are disconnected from the LAN.

1. Choose Help - Contents.

2. Click How Do I?
3. Select Using Organizer on a Notebook Computer.
4. Select Help topics you are interested in.

See "Merging files," in Chapter 4 of Lotus Organizer 2.1 *Exploring Organizer*, for more information. Users can also enable the option on their .OR2 file to send an e-mail notifications for meeting notices.

**Tip** If a user edits the same entry on a notebook computer as another user on the LAN (for example, moves a meeting), the change in the .OR2 file on the notebook computer takes precedence over the .OR2 file on the LAN.

**Q. How do you set up and use cc:Mail Mobile for Windows and Organizer 2.1 to do group scheduling on a notebook computer?**

- A.** The mobile user wants to run Organizer 2.1 on a notebook computer while away from the office and keep LAN and mobile .OR2 files updated with current Organizer information. This answer assumes that the mobile user will be logging into the network on a regular basis. If the mobile user is strictly a remote user, then meeting invitations can be sent, but responses will be updated through e-mail messages. (See "How can users manage their Organizer files when they are sometimes disconnected from the LAN?" in this section for more information.)

Setting up and using cc:Mail Mobile for Windows and Organizer 2.1 to do group scheduling on a notebook computer is divided into the following phases, which are described in more detail, below:

- Installing Organizer
- Using cc:Mail Mobile to add Organizer 2.1 scheduling information
- Scheduling meetings when disconnected from the LAN
- Returning to the LAN

**Installing Organizer**

1. Install Organizer on the notebook computer. (See "Running Install," in Chapter 3 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.)

Keep these points in mind during the installation:

- Select the Install on a file server option in order to enable group scheduling.
- Select Server install in the Server Install or Network Distribution dialog box.
- Select the Enable group scheduling option and cc:Mail from the Scheduling list box in the Organizer Scheduling Configuration dialog box.

2. After the file server installation, complete a node installation.

**Using cc:Mail Mobile to add Organizer 2.1 scheduling information**

1. Add the address of Lotus Organizer Scheduling Agent 2.1 exactly as it is entered in the home post office cc:Mail directory to the cc:Mail Mobile for Windows directory as a "p" entry. In the cc:Mail Mobile directory, add the comments for Lotus Organizer Scheduling Agent 2.1: #! #>101#!#.
2. Add the OrganizerCalendarPath information (02 field) to the Comments field for the local "L" user in the cc:Mail Mobile directory. OrganizerCalendarPath points to the location of your .OR2 file on the notebook computer and lets the user open the .OR2 file by name for group scheduling. For example, #!#>102>04\_org2agent>02c:\lotus\org2\orgfiles\user.or2#!#.
3. In the cc:Mail Mobile directory, add the home post-office users and their comments for

group scheduling as "r" entries. Add the OrganizerCalendarServer for the home post office in the Comments field to specify the network server name and volume for the .OR2 files. For example, #!#>102>04\_org2agent>03server\volume>02lotus\org2\orgfiles\users\*.or2#!#.

Make sure that the cc:Mail user name is **exactly the same** in both the home post office and the mobile mail directory. The .OR2 file writes the login name into the file to specify the owner of the .OR2 file. If the mobile login name is different from the home post office name, when Organizer opens the .OR2 file in Names mode, an error occurs because the user doesn't have access rights to the file.

**Tip** You can use Automatic Directory Exchange (ADE) or import directory/propagate to update your cc:Mail Mobile directory with the correct Organizer 2.1 scheduling information in the Comments field. If users use ADE, they only need to change the local mobile user's Comments field to point to the directory where the .OR2 file is on the notebook computer.

### **Scheduling meetings when disconnected from the LAN**

1. Copy your .OR2 file to the notebook computer.

**Note** You can change the file attributes of the .OR2 file on the network to RO (read only) if you don't want responses to be written to the LAN .OR2 file. If the file is flagged "read only", the scheduling agent will process responses from other users for this .OR2 file, but the file won't be updated and the messages will be lost.

2. Open the .OR2 file in the notebook computer in Names mode, schedule a meeting, and invite users.

All other user names are dimmed because Organizer can't do a free-time search of other users' .OR2 files when the mobile user is disconnected from the network where those .OR2 files are stored. The mobile user can still send meeting notices to other users on the LAN.

3. After scheduling meetings, start cc:Mail Mobile and send the messages to the home post office.

On the LAN, the scheduling agent picks up the meeting notices from the mobile user and writes them directly to the other LAN users' .OR2 files.

When a LAN user opens Organizer in Names mode, the meeting notice will be there. If the LAN user responds to the meeting (for example, accepts the invitation), Organizer creates a meeting reply to the mobile user. When the scheduling agent polls its mailbox again, the message reply is sent to the mobile user's LAN .OR2 file, as indicated in the Comments field for that mobile user on the home post office. The responses won't be sent back to the mobile user's mobile .OR2 file.

If the user doesn't want to use the scheduling agent, the user can send scheduling information directly to individuals through mail messages. Users must reply manually to scheduling requests.

.OR2 files won't be updated and a cc:Mail message will be generated if any of the following conditions exist:

- OrganizerAgentName (04 field) in the Comments field of the local user in the cc:Mail Mobile post office directory doesn't exist
- The scheduling agent entry isn't added to the cc:Mail Mobile directory
- The Organizer scheduling information for the other users is missing from their Comments fields in cc:Mail Mobile

### Returning to the LAN

When the mobile user returns to the LAN, the user can open and check the LAN .OR2 file for responses. This is the **original** .OR2 file, **not** the mobile .OR2 file that was used to schedule the meeting. When the mobile user opens the LAN .OR2 file, none of the new meetings will be there.

1. Merge the .OR2 from the notebook computer to the .OR2 on the LAN.  
See "What can mobile users do with their Organizer files when they are disconnected from the LAN?," in this section for more information.
2. After merging the .OR2 files, click Status to check responses to meeting invitations. Responses will update the status of invited users.

If the mobile user goes into the LAN (original) .OR2 file and checks for responses to the meeting invitations sent from Organizer 2.1 on the notebook computer prior to merging the two .OR2 files, the user will get the following message:

"Organizer will change the status of \_\_\_\_ user to accept"

and then the message:

"Organizer cannot update the status of a meeting no longer on your Calendar. The meeting will be added to your Calendar"

Organizer will then add the meeting to Calendar and change the status of the attendees. If the file merge is done after this, there will be duplicate, conflicting meetings. One meeting will have an invitation status and the second meeting will have a response status. If one of these conflicting meetings is deleted, the scheduling agent creates a message that will cancel the meeting for all the attendees the next time the scheduling agent runs.