Lotus Organizer 2.1 Deployment Questions and Answers

for Group Scheduling with Lotus Notes

This document provides answers to commonly asked deployment questions for administrators who use Lotus Organizer® Release 2.1 for group scheduling with Lotus Notes™. 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:

- 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.

Planning and deploying Organizer scheduling agents

Q. What are the similarities between the stand-alone and add-in server-task scheduling agents for Notes?

A. The stand-alone and add-in server-task scheduling agents for Notes both perform the same task. The stand-alone task runs all the time, while the add-in server task only runs on a schedule from a Notes server.

See "What does Lotus Organizer Scheduling Agent 2.1 do?", in Chapter 2 and "Starting and ending the stand-alone scheduling agent for Windows," "Starting and ending the add-in server-task scheduling agent for Windows," "Starting and ending the stand-alone scheduling agent for OS/2," or "Starting and ending the add-in server-task scheduling agent for OS/2," all in Chapter 3 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

Q. What are the differences between the stand-alone and add-in server-task scheduling agents for Notes?

A. The stand-alone and add-in server-task scheduling agents for Notes have the following differences:

- If you run your Notes UNIX® servers 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 stand-alone scheduling agent for Windows 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.

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

Q. How do you decide whether to use the stand-alone or add-in server-task scheduling agent for

Notes?

A. For heavily scheduled users, rooms, or resources, you should use a fast (for example, 486/33 PC or better) and dedicated PC for the scheduling agent with specific scheduling-agent mail databases. Using separate scheduling-agent mail databases can shorten the time a user, room, or resource is booked after an Organizer user schedules it.

Some sites will use a dedicated PC for all Notes add-in server tasks (for example, Lotus Organizer Scheduling Agent 2.x, Lotus Mail Exchange Facility (LMEF), and the Lotus Notes Pager Gateway for SkyTel®). This strategy, however, requires additional hardware and software.

You can consider the following factors in deciding which scheduling agent is best for your needs:

- You may want to off-load the processing of meeting notices from your Notes server to maximize the performance of Notes applications.
- If you have your Notes servers configured exactly the way you want them and you don't want to disrupt your Notes configuration by adding another add-in server task, use the stand-alone scheduling agent.
- If the scheduling agent stops, you are less likely to lose the Notes server process.

See "Guidelines for configuring a scheduling agent" or "Mail-based scheduling examples with Notes," in Chapter 2 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

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 Notes environment.

You can use corporate e-mail statistics and the Notes Statistics Reporter database 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 mail databases should you have?

A. The number of scheduling-agent mail databases 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 mail databases?

A. The location of scheduling-agent mail databases makes no difference to Organizer. The only restriction is that the PC, or Notes server that the scheduling-agent process runs on, must be able to log into its mailbox to receive and process meeting notices.

The mail databases can be put on any Notes server. 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 Notes," in Chapter 2 of Lotus Organizer 2.1 *Administrator's Guide*, for more information.

As a benchmark, start with one scheduling agent mail database for each Notes mail server. Then, make it a standard part of setting up each additional Notes server. You may need to adjust this benchmark up or down as you evaluate Organizer performance.

Q. How should you name scheduling-agent mail databases?

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 Notes Name & Address Book 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 a stand-alone or add-in server-task scheduling agent for Notes?

A. Run Lotus Organizer Scheduling Agent 2.1 Install for Windows or Lotus Organizer Scheduling Agent 2.1 Install for OS/2 . See "Installing Lotus Organizer Scheduling Agent 2.1 for Windows" or "Installing Lotus Organizer Scheduling Agent 2.1 for OS/2," 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 "Configuring the Notes scheduling agent entry," in Chapter 3 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 Notes Name & Address Books. 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 Notes, users must use the VIM DLLs included with

their VIM-enabled applications (for example, Lotus Notes Release 3.2 or later, or Lotus Notes Express).

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 Notes Windows client 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 Notes users with distinguished names use LMEF Release 3.1 to schedule meetings with cc:Mail users?

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

In order for Notes users with distinguished names to schedule meetings successfully with cc:Mail users 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 Notes, a reasonable starting point is 50-60 Organizer users on a Notes OS/2 server running the OS/2 scheduling agent as an add-in server task on the same Notes server. In this case, it may make sense to assign all Notes mail users to the one scheduling agent running on that server. However, if you dedicate an OS/2 system to run the scheduling agent (as an agent hub), it is possible that you could have one scheduling agent service hundreds of users spread across many Notes mail servers. 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. 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.

Q. What are the variables that affect network performance?

A. Because Organizer uses your existing Notes 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.)
- Notes server 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. What can mobile users do with their Organizer files when they are 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 using Organizer when 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.