

LOTUS® APPROACH 97® EDITION README FILE

For this document to print properly, set the top, bottom, right, and left margins to 1 inch in your word processing application.

This file contains important information that is not included in the printed documentation or online Help. This file is divided into the following sections:

1. Installation and networks
2. Previous versions of Approach
3. User Assistance updates
4. Windows NT and Lotus Notes
5. Client Server issues
6. OLE Automation issues
7. ZIP code database
8. The Approach Web Browser
9. For Informix customers
10. Miscellaneous notes

1. INSTALLATION AND NETWORKS

A. Installing to directories other than the default

If you install Lotus Approach 97 to a directory that contains a hyphen (-) in its name, you cannot use the Uninstall program to remove the product.

B. Installing Approach 97 when running Windows from a server

You can install Approach 97 on a Windows node computer (client) that is operating from a copy of Windows on a server.

- If you have read/write privileges to the Windows server and you install Approach 97 as a stand-alone application on the node computer, Install copies the ODBC-related .DLL files to the WINDOWS\SYSTEM directory on the server.
- If you have read-only privileges to the Windows server and you install Approach 97 as a stand-alone application on the node computer, Install copies the ODBC-related .DLL files to the Windows directory on the node computer.
- If you install Approach 97 in a server/node configuration, Lotus recommends the following method:
 1. Be sure the person who does the Approach 97 File Server installation has temporary read/write privileges to the Windows server.
 2. Using any Windows node computer, install Approach 97 as a file server to any shareable location on the network.

3. After installing the Approach 97 File Server, you can reset server privileges to read-only.
4. Using any Windows node computer, start INSTALL.EXE from the Approach 97 File Server's location.
5. Install Approach 97 to that Windows node computer. Install will automatically install only the node portions of Approach 97.

For information about installing a served-based setup of Windows, see the Microsoft Windows 95 Resource Kit, available from Microsoft Press.

2. PREVIOUS VERSIONS OF APPROACH

When you open and save Approach 2.x .VEW files, Approach 3.x .APR files, or Approach 96 .APR files in Lotus Approach 97, Approach 97 converts these application files to Lotus Approach 97 format. If you want to use the .APR file in earlier versions of Approach, make a copy of the original .APR file before opening that file in Approach 97.

Approach 97 does not convert the actual data itself, so you can open a database created in Approach 3.x or Approach 96 without any problems. To open a database created in Approach 2.x, you must delete or rename the .ADX files associated with the database. To ensure that information in your databases, .APR, and .ADX files is not lost, make backup copies of all files before opening them in Approach 97.

3. USER ASSISTANCE UPDATES

A. Online documentation

The Approach 97 documentation is available in .PDF format. These files are read by Acrobat Reader, which is included on the CD with Approach 97. You can read the documentation online using Acrobat, or you can print the documentation. Acrobat Reader is a 16-bit program.

B. High Contrast screen display

If you set your screen display to any of the High Contrast Black color schemes using the Control Panel (Display icon, Appearance Tab), you are not able to see the text of the online Help. This is because the High Contrast Black color schemes set the window background to black, and the text of the online Help is also black.

C. Demos

Lotus recommends that you let a demo play until it ends. If you must stop the demo, press ESC.

4. WINDOWS NT AND LOTUS NOTES

Windows NT version 3.51 and 4.0 do not have a translation layer that allows 32-bit applications to communicate with 16-bit applications. Therefore, Approach 97 installed on a Windows NT system cannot read information from a Lotus Notes® 3.x or Notes 4.x (16-bit) client. You need to upgrade your Notes client to Notes 4.x (32-bit). Approach 97 running on Windows 95, however, can access Notes™ 16-bit data sources.

5. CLIENT SERVER ISSUES

A. Oracle7 server access

Approach 97 requires the Oracle 32-bit client to access Oracle. This client software can only access Oracle7 databases.

B. SQL Backends read-only

Approach 97 will open any IBM DB2®, SQL Server, Sybase, Informix, or any other ODBC data source connecting to SQL backend in read-only mode if you do not have privileges to update the table, or if the table does not have a unique index. If the table has a unique index, and the user has read/write privileges, yet you do not want the user to change the data using Approach, do one of the following:

- Select "Open as read-only" in the Open dialog box
- Change the value of iReadOnly in the registry under HKEY_CURRENT_USER\Software\Lotus\Approach\97.0\SQL from 0 to 1. Note that the iReadOnly = 1 option also prevents the creation of SQL Server, Oracle, and ODBC files.

6. OLE AUTOMATION ISSUES

A. Removing the Welcome dialog box

When Approach starts, the user is presented with the Welcome dialog box. This can be turned off manually by doing the following:

1. Choose File-User Setup-Approach Preferences.
2. On the Display tab, deselect Welcome dialog.
3. Click Save Default.
4. Click OK.

B. LotusScript public constants

Several LotusScript® methods take a constant as a parameter. These constants are longs that are defined in the file Approach/CNSTNTS.INC. To use these constants in a Visual Basic application, do one of the following:

- Use a text editor to search for the constant, and then copy it into your Visual Basic application.
- Use APILOD32.EXE. With APILOD32.EXE set the API type to Constants, and then load CNSTNTS.INC. Be sure to include the extension because APILOD32.EXE adds TXT by default.

C. Switching views from within an OLE Automation client

To switch views in an Approach application from an OLE Automation client, insert a global sub into your script that switches within the Document object (.APR file). For example:

Insert the following sub into the .APR file that is called from the OLE Automation client:

```
Sub SwitchViews(strViewName as String)
Dim i as Integer
For i = 0 to CurrentDocument.Views.Count
    If CurrentDocument.Views(i).Name = strViewName Then
        Set CurrentWindow.ActiveView = CurrentDocument.Views(i)
        Exit Sub
    End If
Next
End Sub
```

This sub can then be called using the RunProcedure method of the Application class.

Insert the following statement into the OLE Automation client script:

```
Call <applicationobject>.runprocedure("SwitchViews", "Form 1")
```

D. Quit Approach application

When you run Approach in a client application (such as Visual Basic), you need to include the Quit method before exiting the client application. If Quit is not included in your code, Approach will continue to run. For example:

```
Dim myapp as Object
Set myapp = CreateObject("Approach.Application")
myapp.OpenDocument "test.apr", "c:\lotus\work\approach"
myapp.Visible = true
myapp.Quit 'make sure to include this line
```

7. ZIP CODE DATABASE

You can access a ZIP code database from the CD-ROM English version of Lotus Approach 97 and Lotus SmartSuite® 97.

To use ZIP.APR as part of a database, do the following:

1. Start Approach and click Browse for more files.
2. Select the Approach 97 or the SmartSuite 97 CD-ROM.
3. Change to the EXTRA/APPROACH/DBASES directory.
4. Open ZIP.APR.
5. To copy the file to your hard disk, choose File-Save As.

The ZIP code database supplies the appropriate ZIP code when you enter a city, county, or state. You can also enter the ZIP code to find the corresponding city, county, or state. When you join this database to a database listing customers, contacts, or orders, you have a powerful tool for creating mass mailings, tracking product sales by ZIP code, and more.

This SmartMaster™ application includes one report organized by city and another report organized by ZIP code.

8. THE APPROACH WEB BROWSER

If you install Approach 97 from a CD-ROM, you can access a World Wide Web browser in the form of an OLE Automation Custom Control (OCX). You can embed the Approach Webtrek OCX into an Approach form or use it with another application.

The Webtrek OCX is included in the Surf the Net SmartMaster (SURFNET.MPR) as an alternative to your current browser. This SmartMaster, installed as part of the default Approach installation, helps you find specific Web sites on the World Wide Web by providing views by category, keyword, and location. You can connect to a Web site using any browser, including the Webtrek OCX browser. This allows you to browse the Web without leaving Approach 97.

You can install this OCX directly from the Approach SmartMaster Setup screen, or by running SETUP.EXE from the CD. When you select the Surf the Net SmartMaster from the New Database dialog box, the SURFNET.APR file is created in the \WORK\APPROACH\ directory on your system. To create the SmartMaster and install the Webtrek OCX, follow these steps:

1. Start Approach.
2. Click the "Create a new file using a SmartMaster" tab on the Welcome dialog box.
3. Select the "Internet World Wide Web Sites" SmartMaster application.
4. Click OK.
5. Choose Setup on the Surf the Net main menu.
6. Click the button to install the Webtrek OCX and follow the instructions.

To install this OCX from the CD-ROM, follow these steps:

1. Double-click the My Computer icon on your Windows desktop.
2. Find \EXTRA\APPROACH\WEBTREK on the CD-ROM.
3. Double-click WEBTREK.EXE to begin installing the Webtrek OCX.

Once the installation is complete, see "Overview: OLE Custom Controls" in Approach Help for more information on how to use OCX controls within Approach.

The Surf the Net SmartMaster includes SURFNET.DBF, a database that contains all the information for approximately 500 World Wide Web sites. Because some Web sites may have changed or may no longer work, you should update the URLs in SURFNET.DBF accordingly.

9. FOR INFORMIX CUSTOMERS

The following configurations have been tested. All the connectivity software needed on the client machine can be obtained from Informix.

A. For Informix 5.01 clients

To connect to Informix5 or Informix7 database servers, do the following:

1. Install I-NET 5.01.TE1 for Windows NT or Windows 95.
2. Use SETNET utility (setnet.exe), which comes with I-NET, to set up Hostname, Username, Servicename, Protocolname, and Password. You can choose any password option from Ask Password at run-time, No Password, or Password options.
3. Install Approach 97 using the Customize features option.
4. On the PowerKey tab, select Informix5 ODBC driver.
5. Use ODBC Administration tool to set up ODBC Data Source for Informix5 or Informix7 database servers connection.
6. Start Approach 97, and then select Informix5 file type to connect to either Informix5 or Informix7 database servers.

B. For Informix 7.10 clients

To connect to Informix5 or Informix7 database servers, do the following:

1. Install ESQL 7.10.TC1 for Windows NT. ESQL 7.10.TC1 is supported for Windows NT 3.51 only, not Windows 95 or Windows NT 4.0.
2. Use SETNET utility (setnet.exe), which comes with ESQL, and then click Edit Server Information.
3. Enter the name of InformixServer, InformixDir, and Hostname, Username, Servicename, Protocolname, and Password. Select No Password option or Password option. (Ask Password at run-time option causes connection problems.)
4. Click Done, and then click Save Reg.
5. Install Approach 97 using the Customize features option.
6. On the PowerKey tab, select Informix7 ODBC driver.
7. Use ODBC Administration tool to set up ODBC Data Source for Informix5 or Informix7 database servers connection.
8. Start Approach 97, and then select Informix7 file type to connect to either Informix5 or Informix7 database servers.

You still need to enter password when accessing Informix5 or Informix7 database servers in Approach 97 if the database security requires it. It does not matter whether the password option you chose was No Password or Password.

C. For Informix 7.20 clients

To connect to Informix5 or Informix7 database servers, do the following:

1. Install Informix-CLI 2.50.TC2 for Windows NT 3.51 or NT 4.0 or Windows 95.
2. Use SETNET utility (setnet32.exe), which comes with CLI. Use the Server Information tab and Host Information tabs to enter the name of Informix Server, Hostname, Protocolname, Servicename, User Name, and Password. (You can choose any password option.)
3. Click Apply and then OK.
4. Install Approach 97 using the Customize features option.
5. On the PowerKey tab, select Informix7 ODBC driver.
6. Contact Lotus Approach Tech Support to receive the following files:

LOINF709.DLL
LOBAS09.DLL
LOUTL09.DLL
LOFLT09.DLL

7. Copy these files to your Windows system directory.

For Windows NT: <WindowsHomeDir>\System32
For Windows 95: <WindowsHomeDir>\System

8. Use ODBC Administration tool to set up ODBC Data Source for Informix5 or Informix7 database servers connection.

D. Informix and TCP/IP

For all versions of the Informix 5 and or Informix 7 customers, if you are using TCP/IP protocol, you need to update INETWSOK.DLL with a version dated 7/3/96 or after. You also must add the following entry to the [ENVIRONMENT] section of the INFORMIX.INI located under Windows home directory.

```
mcblocokmode=2
```

10. MISCELLANEOUS NOTES

A. Dialer settings in the APPROACH.INI file

There are two settings in the [AutoDialer] section of the APPROACH.INI file.

- LDThresh=8

This sets the threshold for the number of digits that are needed to use the 'Do Not Dial' option and the 'Access Code' option.

- LongDist=1

This is the actual number that is dialed when a long distance 'Access Code' is needed.

B. Paradox sort order

sParadoxSortOption, the parameter for the sort order of Paradox files, is in the Windows Registry under HKEY_CURRENT_USER\Software\Lotus\Approach\97.0\General. When using Approach 97 with Paradox files, set this parameter to the same sort order as Paradox.

If you do not use Paradox files, the defaults are:

US settings: sParadoxSortOption=ASCII

Swedish or Finnish: sParadoxSortOption=SWEDFIN

Norwegian or Danish: sParadoxSortOption=NORDAN

All other settings: sParadoxSortOption=INTL

C. Open DataBase Connectivity (ODBC)

Lotus Approach 97 supports drivers that meet the Microsoft Open Database Connectivity (ODBC) specification. ODBC drivers must be installed using the ODBC Driver Manager. The ODBC Driver Manager can be obtained from Microsoft or ODBC driver vendors. The ODBC drivers themselves can be obtained from various sources including database vendors and ODBC driver vendors.

Note: Many ODBC drivers have not been certified with Approach 97. Lotus does not provide technical support for these drivers. Approach 97 cannot use ODBC drivers that Approach 3.x used. You need new 32-bit versions of any drivers you wish to use with Approach 97.

D. International Characters

There are two supported types of characters, ANSI (Windows) and OEM (DOS). National characters (like the German ü, or the French accented characters like é) are stored differently in these two character types. A German ü stored in an OEM file does not appear as ü when the same file is opened as an ANSI file.

Most DOS applications (like dBASE and Paradox) store files in OEM. Most Windows applications store files in ANSI.

sDefaultDataType is an Approach parameter in the Windows Registry under HKEY_CURRENT_USER\Software\Lotus\Approach\97.0\General

Set sDefaultDataType=OEM

- To create Paradox and dBASE databases in the OEM character set (during Export, Save As, and New).
- To use Approach 97 files with a DOS application like dBASE or Paradox.

Set sDefaultDataType=ANSI

- When you are using only Approach 97 and not dBASE or Paradox.
- To create Paradox and dBASE databases in ANSI.

If unusual characters appear in Approach after opening a database created by dBASE or Paradox, change the ANSI/OEM setting in the Database tab of the Approach Preferences dialog box, and reopen the table

If unusual characters appear when using dBASE or Paradox to open a database created by Lotus Approach, do the following:

1. Set sDefaultDataType=OEM.
2. Open the file in Lotus Approach.
3. Choose File-Export Data and export the data to another file.

Note: Do not use the sDefaultDataType parameter when creating Oracle, SQL Server, Sybase, Informix, or Lotus 1-2-3 files.

E. List separator

When using Approach 97 with a country setting other than United States, note the character identified as the list separator in the Windows 95 Control Panel (Regional Settings icon, Number tab). This character, usually a ',' (comma) or a ';' (semicolon), should be used in place of the United States list separator, the comma. Use the list separator in formulas, dates, and anywhere else they are required.

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