Microsoft Memo

To: Pete Higgins
cc: IBU Managers
From: Chris Graham
Date: July 20, 1992
Sub: Status Report - June /Year-end 1992

I.   Major Achievements

OLE - June achievements

- OLE2.0 Milestone 1 was accomplished on 6/5/92.
- Patent work started for both OLE 1.0 and 2.0
- OLE1.0 developers Toolkit was released
- Usability test Phase completed for OLE2.0
- NT OLE1 Beta shipped with NT CD-RO

OLE - FY '92 achievements

- Filed first OLE patent application
- Shipped OLE1.0 for Windows
- OLE1.0 for the Mac is on Compuserve and in major customers' hands
- OLE1.0 for NT was released with the PDK version
- OLE2.0 is fully spec'd and designed
- The OLE Team is 85% staffed.
- OLE2.0 for Windows hit the first Milestone.
- Work on MacOLE2.0 is approaching the first milestone.

VISUAL INTERFACE DESIGN - June Achievements

- Visual Design Guide released to ISV's and MS Press (including work for Toolbar button DLL and Interactive Style Guide)

VISUAL INTERFACE DESIGN - FY '92 Achievements

Summary of major projects completed last year:

Systems

- Windows 3.1
- Notebook for Pen
- Networking Windows (Sparta)
- NT
- Cairo

Applications

- Design of 3-D appearance for apps
- MS Mail (Bullet)
- Schedule Plus (Bandit)
- Excel

- Composer
- WinWord
- Win Project 2.0
- Boris
- Cirrus

Multimedia:

- Gryphon and Haiku (Player)
- Miss Kitty (Sony Bookman)

Other achievements:

- Visual Design Guidelines completed
- Developed "Art of Visual Interface Design" talk for MS Developer's Conference and local SIG CHI and MS University course
- Unprecedented amount of work on standards for UITF and feature teams
- We also completed 44 other design projects.

USABILITY - June Achievements

- Completed 7 Usability tests.
- VisNews filmed the lab and various members of the group for a Video News Release on Usability.
- Mary Dieli completed a Usability Press tour which included 13 television interviews and made a presentation on Usability to the Latin American subsidiaries here for a conference.

USABILITY - FY '92 Achievements

- Conducted nine usability tests that contributed to the usability of Excel 4.0. These tests included Drag & Drop, toolbar, cross tabs, and a number of formatting features.
- Conducted seven usability tests that made a direct contribution to the release of Word for Windows 2.0.
- We completed five tests for MS Money and five tests for Publisher as part of an ongoing Consumer Division testing plan.
- We also completed 107 additional usability tests for a total of 128 tests.
- We conducted 31 lab tours, completed a usability videotape, and completed 3 press tours

INTEROP DESIGN - June Achievements

- Published Microsoft Interoperability Feature Set with Chris Graham as a minimum interoperability guideline for non Excel/Word applications
- Launched IDIS (Interoperability Design Information Service) as a company wide central information warehouse for interoperability information. This will give program managers easy access to specs, contact names of designers, schedules and cross-app design documents through an easy to use on-line system
- Completed WinOffice test plan and test cases. Opened 43 bugs against WinOffice

INTEROP DESIGN.- FY '92 Achievements

- Created the Interoperability Design Group to coordinate consistency and integration between applications and with systems.

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- Developed interoperability vision statement and proposed core feature set.
- Organized interoperability design process including Word and Excel shared design of core features participation by other product groups.

II.   Strategy Changes

OLE - June Strategy Changes

- It is very hard at this point to understand the strategy behind Chicago. Moreover, no resources are allocated at this point to work on a true 32bit version. According to the existing plan we will ship a 32 bit version 6 month after the WinOLE2.0 is shipped.
- Following a Apple-Microsoft meeting, we proposed to Apple cross-licensing OLE and ODBC for Apple Script and True Type 2.0.

OLE - FY '92 Strategy Changes

- The company has identified 32 bit systems and application as major piece in its products strategy. The OLE team is not fully prepared to address the 32bit OLE2.0 in the time frame for *Chicago* as it stands right now.
- Following a Apple-Microsoft meeting, we have prepared a proposal for a cooperation framework between the two companies with respect to OLE2.0. The discussion (between PeteH and Apple - Management) is on-going.

IV.   Project Status

OLE - June

- OLE2 Spec - The architects made very good progress on the spec and we have met the target date of July 10 to finish it. There may be some areas still incomplete such as overlapping object support and search/spell, but these should not impact our development schedule for WinOLE2 since we plan to defer these features to 2.01. **We plan to waive NDA and widely distribute the spec to ISVs and our own apps by the end of July.**
- WinOLE2 - MM1 was completed within a few days of our original target date. Basic OLE 1.0-type functionality for embedding objects can be demonstrated using Docfiles. Testing, however, has just begun. Following this, the development team re-evaluated the tasks required to complete MM2. It now appears a realistic MM2 target date is 9/5 (including two weeks for integration testing). MM2 should be code complete. A full WinOLE2.0 schedule will be published by the end of July.
- WinOLE1 - We got some early feedback from PSS saying that our WinOLE1 Developer's Toolkit has been well received by those dialing into access it on Compuserve.
- MacOLE2 - MM1 is about 25% complete. Our target date is 8/31 which is within the 3 month delta from the Win version we set for ourselves. The build process is well under control and core-code is compiling validating our development strategy. Docfiles are being compiled and Mac-specific memory and file management should be done this month. We have started the low level remoting implementation. Testing issues remain and need to be dealt with. JohnLef and BenW attended MacHack and got our first real press exposure for MacOLE2. The Mac user community response was quite positive.
- MacOLE1 - The schedule has been delayed due to several bugs identified in DLL's and sample code. The product is complete and ready for release. However, actual shipment will await the completion of the documentation scheduled for 7/31. The work on finishing MacOLE1 has consumed some of the resources planned for MacOLE2.

- NT OLE1 - We shipped the Beta on NT CD-ROM being distributed at PDC.

- MS Press WinOLE1 book - This is about 70% complete and should be done this month.

- Programmability and OLE - The OB Team agreed to provide us an update and expansion on the programmability section for the OLE2 spec. We have just received a draft and it covers both IDispatch and Type Libraries. We plan to ship this document out with the spec as an addendum.

- We are being called upon more frequently to give presentations on OLE. We gave talks at the FoxPro Users Conference, MacHack and for the Reuters corporate briefing in June and the Win32 PDC in July.

- Patents - We filed our first OLE patent on WinOLE1, "A Method and System for Registering Data Formats and Objects". Two more on Monikers and Docfiles should be submitted this week.•

VISUAL INTERFACE DESIGN - June

- Cairo - Continued work on Cairo interface demo. Updated Cairo Graphic Design Doc. Handed off 6 icons. Worked on designs for: back (in Explorer), preview cursor, thumbnail inspector, clipboard in context menu, tray as toolbar for visible clipboard (in various orientations), marked objects, flat controls, Cardfile

- Dali (Mobile pen shell) - Refined design on desk metaphor, bitmaps being integrated into prototype. Designed document file system metaphor and images. Currently redesigning desk for 320x200 displays, and providing animation's to suggest functionality

- Mouse UI - Created UI screens for setup process and put these in a Director prototype (to be presented 7/1 to team). Created Ergonomics icon. Consultant to freelancer on Windows/Setup standards.

- Gunsmith (Viewer Authoring Environment) - BillFl, ChrisT, and RobinLu met to discuss design work. BillFl began work and presented a fist pass at Text Markers, OLE Server dialogs, Application Icons, Toolbar buttons.

- IFAX - Continued working with Renee on IFAX project. We developed ideas for Setup, Options, Poll, and Broadcast screens. Designed three controls for Setup Dialogs (one for touch and two for keyboard). Documenting the UI specifications for IFAX-type Apps. Design 4 screens for Edit PhoneBook

- WinWord - More panel-switcher dialog designs (approx. 12) presented to team. Numerous ruler designs presented - narrowing on final solution.

- Works - Passed off first round of bitmaps for calendar screen.

- Golf - Completion of product icon, 4 dialog buttons and general UI touch up on dialogs.

- VB Pro 2.0 & VB 2.0 - Completed EGA/Mono resolutions for 14 toolbar buttons. Reviewed properties Window and Bill Boards (setup) and gave recommendations. Created and handed off the setup screen. Updated button files in current VB Pro to match new 6 visual states. Created approx. 10+ more buttons (from the Excel button library) and handed these off to PM.

- Equation Editor - Completed and passed off first pass of redesign of toolbar buttons

- Imager - Created and passed off first pass of floating tool palette. Created new toolbox images for scan, soften, sharpen, and move. Cursor files were created for zoom, move, and crop

- Visual Design Guidelines and ISV work - Updated external version for ISV release. Created three icons (VDG, BtmApp, Interactive). Reviewed BtmApp and made numerous corrections (flying email). Consulted Sherryr's freelance tester. Corrected and negotiate changes to Toolbar Button DLL and Button Demonstration App.

USABILITY - June

Desktop Applications Division

- Word 2.0. Tables test. Analysis, report and presentation complete
- Project 3.0. Still waiting for team to get him data from instrumented version for analysis
- Word 2.0. Print Dialog/List Box test. Proposal approved and developing test materials
- WordPerfect Tables test. Developing proposal.
- OLE 2.0 phase 2. Designed prototype, surveyed users, proposal approved, began running subjects

Systems Division

- SQL Server Proposal Complete
- Cairo. Object Oriented test on hold due to higher priority request from client
- Cairo. Began planning Cairo transfer model test.
- Windows for Workgroups (Winball). Completed proposal, ran subjects.

Database and Development Tools Division

- Excel 4.0 Index Terms Collecting Data
- Excel 5.0 Workbooks and Sort

Consumer Division

- Gandalf (MM Encyclopedia) Phase III Collection data
- Money 3.0. Began planning Money field test (originally conceived as focus group) & handed off to marksim
- SPLAT 1.0 (kid's art program). Completed proposal, began designing test materials
- Boris #4 (accounting). Completed proposal and testing. Began data analysis

Workgroup Division

- No tests now.

Software Strategy Division

- Transfer Model test. Proposal sent to client

INTEROP DESIGN - June

- Microsoft Interoperability Feature Set
- Published Microsoft Interoperability Feature Set with Chris Graham as a minimum interoperability guideline for non Excel/Word applications. This will help define the minimum interop requirements for all MS products.

Interoperability Design Information Service (IDIS)

- Launched IDIS (Interoperability Design Information Service) as a company wide central information warehouse for interoperability information. This will give program managers easy access to specs, contact names of designers, schedules and cross-app design documents through an easy to use on-line system

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- Prepared & scored survey which was designed to assess needs and expectations of Program Managers who will use IDIS. Initial results suggest that most PM's prefer a relatively simple (but robust) system which provides accurate, up-to-date information about specs and other cross-app design documents. This data will guide the development of IDIS Ver 2.0.

- Completed investigation of alternate technologies for implementing IDIS, including SQL Server + VB front end, Cirrus, XL EIS Builder, Windows Help, MultiMedia Viewer, and many others. Prepared initial recommendations, which resulted in the development and release of IDIS Version 1.0 (see above), and which contributed to ongoing discussions with Excel regarding joint development of Version 2.0.

Integration

- Entered 16 new RAID issues.

- Worked on some specific issues. Got tentative commitment from XL5 to mostly solve the busy servers problem, and from TC3 to solve the problem of embedding large objects into Word.

- Worked with OLE group on Paste Special dialog. Four alternatives are being usability-tested in July

User Interface Design Guide (UIDG)

- Monitored status of the UIDG-compliant Online Demo, which was released to ISV's in June.

- Primary responsibility for UIDG transferred to DarleneB, the Systems representative for UI design.

- Coordinated with DarleneB so that final copies of UIDG document (per new MS Press book) and companion software were placed on \\toolsvr\info. This will be the primary, internal distribution point for this material

WinOffice Testing.

- Completed WinOffice test plan and test cases. Opened 43 bugs against WinOffice

Prototyping: OLE 2.0 UI demo

- Replaced Paste As... by Paste Special..., added drag scrolling cursors, added variable drag scrolling hit areas, added variable drag scrolling delay, changed File menus to include Save Copy As, and Return to Microsoft Word

- Re-enabled all File menu items, enabled Undo, enabled all menu items, added "Save File?" dialog and reviewed "Paste Special" proposal

Prototyping: Popups

- Added non-default drag and drop to a private version of the OLE 2.0 prototype

- Activated non-default drag and drop in WinWord

Integration: PSS Feedback

- Initiated project designed at obtaining most frequently reported integration problems from PSS. Results expected in mid-August

Testing Standards Document

- Published initial draft of document that sets minimal testing standards when testing for integration between multiple MS products

V. Staffing

OLE - June

- With the emphasis on accelerating 32bit OLE2, We should consider finding a program manager to

    devote to this platform. JohnLef can not give adequate attention to both MacOLE and NT OLE if the timetable is accelerated.

- We identified a definite need for an editor: we intend to publish two books this year and MS-Press will not dedicate any resources for it. We would also like to recruit a co-op (after our 3 interns are gone).

OLE - FY '92

- The group has grown from 6 people in the beginning of FY '92 to 36 at the end of it.
- OLE2.0 is in the final stages of getting fully spec'd and the tactics of delivering the OLE2.0 product is being finalized. We see the need for more program management, user ed and development staff. The changes are not substantial though.

VISUAL INTERFACE DESIGN - FY '92

- Group grew doubled in size from 5 - 10 designers.

USABILITY - June

- Open Headcount: 1 Usability Specialist, 1 intern. Interviewed 3 intern candidates, 2 usability specialist candidates. Will make an offer to one intern

INTEROP DESIGN - June

- Keoki was reclassified as a program manager.

VI. Two-Month Objectives

OLE - June

- Complete the design of parts that were originally deferred (in situ editing, drag drop) by 5/31 - deferred to 6/15
- Plan OLE 2.0 Alpha/Beta program that will not burden on development but will reflect the fact that we adhere to the open process.
- Meet OLE 2.0 milestone 2 objectives by 9/9.
- Expose OLE2.0 to the ISV community (PR activity, press release, evangelizing)
- Finish Mac OLE 2.0 development plan and update Win OLE 2.0 development plan.
- Finish NT OLE 2.0 development plan and address strategic issues: WOW, Unicode, C2 security.
- Release NT OLE 1.0.
- Resolve MM2 spec issues
- Distribute OLE 2.0 spec by July 31
- Finish Mac OLE 2.0 and NT OLE 2.0 development plan
- Recruit technical, UI program managers and possible product manager
- File patents on OLE 1.0/2.0 technology - one filed so far, two more this week
- Plan OLE 2.0 Alpha/Beta program.
- Resolve AFX/OLE programming model and Cairo/OLE convergence issues
- Develop OLE marketing rollout plan by July 31

VISUAL INTERFACE DESIGN - **June**

- Complete work on Gunsmith, next version of Cairo demo, MacWord toolbar buttons, redesign of 4 MS Money icons, Advisor button for Boris, Colorpicking document, Mac OLE icons, 6 toolbox buttons for VB Pro 2.0..

- Continue work on ODBC icons, Mac Project toolbar buttons/startup screen, Winword panel-switcher dialog and ruler designs, Mac Word buttons.

- Begin work on Cairo Control Panel and sound interface, prototyping Blue Sky, product icon for Hermes.

- Chris Tobey will consult Newsweek in New York on the design of a CD-ROM title that will be bundled with the Bookman when it ships this fall.

USABILITY- **June**

- Begin testing Splat 1.0.

- Complete testing Word 2.0 Print Dialog/List Box, Word 2.0 WordPerfect Tables, Word 2.0 Panel Switching, Dali, Transfer Model test.

- Deliver test results OLE 2.0 phase 2, Windows for Workgroups and Money 3.0 field test.

INTEROP DESIGN - **June**

- Have status tracking system in place

- Have IDIS up and running

- Fully staff department and organize accordingly

- Develop strategic direction presentation for IDG

IV. FY 1993 Objectives

OLE

- Ship OLE2.0 Beta by 1/11

- Ship OLE2.0 for Windows (golden) by the end of Q1 '1993 (calendar year)

- Ship OLE2.0 for Mac (golden) by the end of Q2 '1993 (calendar year)

- Ship OLE2.0 for NT (golden) by the end of Q3 '1993 (calendar year)

- Research and define OLE3.0 mission by the end of Q3'1992 (calendar year)

- Evangelize OLE2.0 in and outside MS to make sure that the implementation of OLE2.0 clients and servers is feasible.

- File patents on OLE 2.0 technology.

- Release NT OLE 1.0.

USABILITY

- Continue our long term relationships with the product teams and increase the number and quality of the tests we complete.

- Making the results of usability tests more easily available to the entire Microsoft community by:

- Making usability results available through a usability results database linked to IDIS.

- Circulating usability test highlights tapes through the library.

- Improve our access to management information by completing usability management information

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system. that tracks project status and produces up-to-date information about our efficiency and effectiveness.

INTEROPERABILITY DESIGN GROUP

- Work with product groups to ensure that key Microsoft applications released in 1993 will ship with support for the complete interoperability feature set.
- Work with Apps Marketing and Product Groups to develop a marketing strategy that will leverage interoperability features to strengthen the Microsoft product family.
- Work with Systems and apps product groups to ensure that interoperability features result in convergence of apps with future Systems releases, and the system can leverage key apps features.