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Vision - Draft

Submission V4.d...

here you go... let me know what you think, and this is what you were looking for. i will probably be adding to it as the week goes on, so i will update you if i think of other things.

richard

Plaintiff's Exhibit

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Comes v. Microsoft

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NGO – Draft Pillars

Richard McAniff

Over the past several weeks, we've talked a lot about how we might define a set of Pillars which help articulate the Vision of NGO. A couple of very interesting observations can be made. Not surprisingly, each of scenarios we have talked about always seems to include elements of each of the NGO pillars. For example, take the case of "Meetings". If we are to be successful, we need to look at meetings in a very broad context; one in which there are no walls or boundaries; where information is accessible from anyplace, any time. Meetings are inherently collaborative, so any solution that we come up with is by definition part of "Collaborative Pillar". Making meetings much more effective also touches on the idea that we need to expand the notion of what Office Productivity software means.

In another way, "Meetings" represent the canonical example of how interconnected we are. To the PowerPoint team, meetings mean "presentations". To the Word team, meetings mean "taking notes". To the Outlook team, meetings mean "calendar and email". To the Access and Office Designer team, meetings mean "issues tracking". To the Excel team, meetings mean "business to business", and to the OWS team, meetings mean "Team Pages". To the customer, meetings mean all of the above and then some.

While the above illustration is certainly an over simplification, I think it nevertheless serves as a way to think about or "frame" the problem. I believe we should focus on a problem set that is both "discreet", but very synergistic. The Word team can work very independently from the Excel team; the Access team independent from the PowerPoint team and so on. But when we roll out a solution, we are all using the same basic infrastructure, and our users are experiencing an integrated solution.

What this means is that from an organizational perspective, we need to all work together on a small set individual scenarios, which when taken together can provide a level of synergy that would be impossible to achieve if we split the problem up too discretely or too independently. We need to all think about the same set of issues, albeit using a slightly different lens.

From a customer perspective, we can provide integrated solution that grows more complete over time. A solution (set of services) which helps our customers easily find and organize their information in a logical and straightforward manner. A solution which allows our users to collaborate and be more efficient and effective at getting their jobs done, whether that collaboration is in a meeting down the hall, or a virtual meeting across the internet. We also need to make sure that our users are equally effective at sharing PowerPoint presentations as they are in sharing a spreadsheet models. We need to foster a personal relationship with our users so that they feel comfortable at relying on us to help them be more productive. Last but not least, we need to make sure that we think clearly about ways in which we allow users of Office

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to more fully participate in this new world with the tools that they have to come use on a daily basis.

With the above in mind, I have written down a set of ideas for the teams that I manage. The list is not meant to be exhaustive, nor is it meant to be final. It is meant to stimulate additional thought, and represents both some short term deliverables, as well as longer term opportunities. I have not explicitly tried to tie any of these ideas to any scenario per se. Rather, I have taken the approach that most of the ideas should be evaluated in light of the specific scenarios that we choose to focus on as a group.

Scenario: "Always Live Documents"

For illustration purposes, I've included an example scenario that stands on its own, but is much more powerful if applied to a broader scenario, e.g., say in the context of meetings.

An "always-live" document is an Office.net document that lives solely on a Microsoft hosted server and can provide universal access to users on a wide range of devices with a variety of different views. The document is called "always-live" because it is a single document that is not only universally accessible, but can also provide functionality that may require the document to be always ready or running on the server.

As an example, let's consider Jason—a traditional Excel user. Jason should be able to create a spreadsheet model detailing his monthly budget. While he could do this with a traditional Excel worksheet and save it to his local file system, he can now use Excel.net to create the budget using an "always-live worksheet." As Jason makes changes to his always-live worksheet, those Excel edits are communicated directly to the Office.net Spreadsheet service (a Microsoft hosted service). From here, the budget is accessible on a wide variety of devices and in a number of different views, such as:

- a non-editable, thin-client HTML 3.2 view
- an editable, thin-client HTML view (communicating changes to the Office.net service (kind of like HalfBrain.com, except that the document lives solely on a hosted server))
- as a WAP view
- or, ideally, as a fully editable and customizable document appearing on a new "always-live" worksheet inside of Microsoft Excel.net

Because "always-live" documents live in a single place on a hosted server in the cloud, they can be easily viewed by multiple users simultaneously (just as a single HTML page can be easily viewed by many different people in the web browser at the same time). What's more exciting, though, is not just collaborative viewing, but the possibility of collaborative editing. Because the document lives on a server, it can respond to edit requests from multiple users transparently, just as SQL Server can

handle multiple queries, updates, and deletes simultaneously. The important step for users lies in providing a consistent, synchronized view to everyone, simultaneously.

In addition to multi-user editing or viewing, however, an Office.net user should be able to see the "presence" of other users that have viewed or edited this document either now, or in the past. Like the MSN Messenger online / offline indicator, the Office.net presence viewer would indicate which users are currently viewing this document and which are currently editing it (as well as who's online and who's not). Chat should also be made available to allow online users to talk about the changes that are being made, or should be made to this document. It should also be possible to see recent changes made by various users.

As noted earlier, this scenario becomes much more powerful if it were part of an integrated solution. Imagine if I could extend Team Pages to be the collaborative place to share "always live documents" with my extended team.

■ **Accessing My Information from Anywhere Any Time**

Part of the "Always Live Documents" is all about being able to Access My information from anywhere any time. But the concept presented is not just about storage. When it makes sense, we should think about hosting application logic as well as the data. Running a spreadsheet as a hosted service is an example of this. Another example would be hosting Data Access Pages on the hosted service. At other times, it may be enough just to provide universal access to the information (data as opposed to program logic).

- **Hosted databases (DAP's, Reports)**
We should enable Access developers to build applications and deploy them to the NGO service. In the broadest sense, this would involve allowing developers to host their applications on our site. A narrower implementation would allow them to host certain applications (for which we provided templates) on the site.
- **Hosted database schemas, tables and associated community.**
In addition to hosting applications in the service, we could make the NGO service a great Access developer repository, where we hosted great content that many Access developers would want in their applications. Examples include tables that developers would want (ZIP codes, Phone Area codes), Customer-Order-Details schema and other examples that developers wanted to share among themselves.
- **Smart Data (Automatic Smart Tags), including related tables.**
It would be very valuable to developers if schema from our site brought additional benefits for free. For example, we could automatically smart-tag all the schema in our templates so that all applications built on this would benefit from the tags.
- **Web Wizards (DatabaseIT, PivotIT, ChartIT, ReportIT, SmartTagIT, ListIT)**
We should extend the concept of a Wizard in Access to span the NGO service and even external data that's part of other web sites. One idea would be to allow an access develop to make a database table of any piece of data (probably a table that is part of that web site). Imagine being easily able to point an Access wizard at a

currency conversion table on a web and include it easily in your database. Think about "web queries for database tables".

- Hosted WebParts
We should host a significant collection of WebParts that we build, plus a catalog of third party web parts that add value to Office.
- Schema annotation tool (TagIT) – Data Model(s).
We should build a new tool that makes it easy to Smart-tag data in Office. One possible way to do this would be to allow users to configure the actions for some well-known smart tags. For example, I should be able to choose between ExpediaMaps or MapQuest as my mapping service for zip codes.
- Web calc, pivot and chart as rich views EVERYWHERE in the service.
We should take advantage of the Web components to generate rich views on data for all users of the NGO service. Charts that show usage, space available, team project participant activity etc. should all be based on the components.
- Reporting component.
We should make it easier to store static and dynamic reports as part of the NGO service.
- Hosted applications and projects.
We should host the latest version of the designer templates as part of the service. The benefits of rich/reach and online/offline appear valuable to the NGO mission
- Document-based events (notification service and subscriptions).
We should unify notification and subscriptions based on sub-document level events so that users will know when critical data, relevant to them, has changed. Examples include comments in documents, slide content changes, spreadsheet value exceed threshold plus traditional notifications, reminders etc. based on rules.

■ **Creating a Personalized Office Experience**

One of the ways to create a personalized Office experience is to own and manage the customer relationship throughout the product life cycle. We want to customize the user's experience based on their profile and history. For example, the Office Portal (this is an overloaded term... this might just be Office Update) remembers what kinds of templates I use; my usage of Office has been calibrated based on the kinds of questions I ask, and the help I get is targeted at my level of expertise (Novice FrontPage user, Professional Access Developer). We should adapt the service based on usage patterns of groups of users. Popular services should bubble to the "front page" of the portal. We should be able to respond to seasonal needs of users, such as calendaring services and so on. We should be able to provide real-time, customized product support through the best available channel: (chat, web, troubleshooters, phone, communities etc.). In a similar fashion, we should provide great error reporting, PSS, online-help, KB, SR's to help our customer rely on us to get their jobs done more effectively.

One of the areas that I also believe we should invest in is extending the concept of Digital Dashboards as being the place where people go to get their work done. In many ways I don't like to use this term because it means many different things to many different people. With that said, I believe we should have a place that unifies everything we are doing. This could be Team Pages if we think that makes sense. In fact, it's not particularly important what technology we start with, but we need a place where our end users can easily add Web Parts, etc.

- Transformation services.
One of the common uses of Excel is as a tool to analyze data from other sources. We should select a set of sources that resonate with our customers, and enable great transformation of data from those applications into Excel. Examples include statistical info, D&B, federal data, Reuters, and Investor data. We should identify a set of data providers and work with these data providers to get these transformations built.
- My spreadsheets, templates, and storage.
We should plan to host Excel content on the service. This should include documents that I create, plus templates that are made available to me. It should also include storage-related services, such as backup, virus scanning etc.
- QFE's, online help (all forms).
We should unify all the help and service-related experiences as part of NGO
- Marketplace for expertise, content, parts, applications.
We should support a marketplace model for content and applications on the NGO service. We should clearly differentiate between content that we offer and content that is part of the community contributed by other office users, but we should offer both.
- Analysis framework for the NGO service.
Excel, Web components and Access should be the internal tools of choice for analyzing the usage of the NGO service. We should generate Access reports; pivots and spreadsheet models that help us mine the data effectively.
- Help that matches my level of expertise. We should have a personal relationship with our customers (in the same way Amazon.com does). Based on our understanding of our customers, we should offer "personalized help" that matches the level of expertise of the user. We should think about how we would integrate this service-based help into the apps directly as opposed to making the user go to a web site to find information.
All help features, PSS, newsgroup, chat integrated into the office client experience
- Personalized portal to find all relevant content & services that are part of the NGO service (and is customizable). We should provide Office NGO users with a customizable home page on the service that defines the user's initial experience on NGO. This page should be user-customizable, and user-editable. We should extend the designer capability to build and edit dynamic applications such as dashboards.

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- Communities that match user patterns. We should offer Communities that help our user community to find the right information to help them get their jobs done more effectively and efficiently.
- Real-time customer survey and feedback collection tools, plus back-end analysis, usage analysis tools to customize the site and offer selections to users
- Customized NGO site experience based on dashboard

■ Building Effective Communities and Teams

Almost everything we have talked about in our planning meetings typically center around collaboration. I believe the key thing we need to do is to agree what collaboration means, and all adopt a model that we agree makes sense in the NGO hosted model.

- Napster for Office documents
We should allow Office users to easily share documents from their existing machines by registering those machines on NGO, a-la-Napster. The goal would be to allow users to access all their documents stored on all their machines from a single location (the service).
- Napster for OWS projects
We should support registering OWS servers with the NGO service so that I could share documents with a team without moving them outside my firewall. The idea is that for company-to-company data exchange, a user could create a shared teamsite as part of NGO and register the related OWS servers. Documents on those servers would appear "virtually" as part of the shared site, and could be worked on by any team member. The documents would remain their current location (lowering the disk space requirements for NGO) and preserving the existing security model.
- Share **part** of a spreadsheet. We should allow users to share just a part (or even a cell of a spreadsheet) with other users. Team members may include both internal team members as well as partners.
- Community (sandbox, chat).
We should support the sharing of ideas and content among our users by fostering a great chat and collaboration framework. This is related to community, and also extends to collaboration scenarios related to specific documents or templates.
- Hosted models, (component), Collabra (SS IM).
We should allow users to put Excel models on the service. This is different to hosting spreadsheets, since the model can be combined with other models and local data to construct a spreadsheet. We should also support collaborative model building, based on the Collabra prototype technology demo that has been built in the components team. This is very similar to the ideas that were put forth in the "Always Live Documents".
- IM integrated in the apps.
Allow NGO users to collaborate on a document (in the app environment using chat and IM features).

■ New Opportunities for Office

One of the things we want to do in NGO is to re-define what Office productivity software means. Here are a few of the ideas that we could focus on in terms of expanding the role of Office within the context of NGO. This list is not meant to be exhaustive. At the same time, it obviously contains many more ideas than we could ever expect to implement in a single release. Again, this is meant to be a list of ideas that should stimulate thought in the evolution of the process.

- New app: Sales force automation / Customer tracking.
We should consider building a tightly intergared customer tracking application as part of NGO – helps with our vision of Office-to-Office. This should be integrated into our team site strategy.
- Application sub-parts that we should build (shopping cart, chat,etc)
One way to enhance NGO application is to provide a set of easy-to-use application sub-parts that developers can add to their application. Examples include a chat UI component that connects to the NGO service and buddy list. Another is a shopping cart application that creates a database of easy-to-manage orders.
- Publishing of catalogs from QuickBooks etc.
One possible outcome of the Napster model would be that we could build features that used Office documents as a conduit to corporate data stored inside the firewall. Imagine that I have an Excel spreadsheet on my local server that generates Quickbooks reports. It would be possible to “register” those reports as part of a team site project, thus allowing others to see the data that is locked inside your firewall.
- Enable B2B for small business via Office NGO.
One rich area for investigation is using Office applications and the NGO service to hook small business up to marketplaces. The idea would be to front-end Quickbooks-like applications with Office components on the client and a registration mechanism on the service so that I could easily process orders into Quickbooks. Here’s the scenario:
 - Use Excel to extract and publish a mini-catalog to Office.Net and then automatically front-end that catalog with order forms hosted on the site (perhaps as part of bCentral).
 - Allow the Office components on NGO and inside the firewall to communicate to download/upload the orders.
 - Allow mail (orders encoded as XML) to be automatically delivered from MyCompany@Office.Net to my application.
- Office-enable bCentral.
We should actively work with a small set of key Microsoft properties to Office-10-enable their sites ASAP. Our long-term goal should be to use these sites to demonstrate the value of NGO technology on a business desktop. bCentral is a great example of a site that should be easy to analyze and report using Office.
- List service - NGO is the best place to keep your lists. We help you author , manage and share them. This is an extension of the List work that the OWC group has already started.

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- New visualization tools/component. If we agree on schema for the NGO service, we have an opportunity to build a much richer data visualization experience for the NGO user. One reason that we can't do this today is we don't have schema for most of the data that we visualize. With schema, we could choose (more easily) the correct dimension to chart on the correct axes, the best chart-type to use, the best color scheme and the best icon/legends.
- New app: Real web site apps behind FP sites (shopping cart, issues etc) customizable in Access. Blur the line between the office application by offering a new breed of application that is a composite of the apps in the box today. For example, a FP web with an Access database, access reports, pivot chart component and excel-based analysis.
- New app: Real web site analysis tools for FP sites (ASP hosted?). Use the Office analysis tools as the analysis framework for web site, both hosted on the service and in the asp world.
- New app: Issue tracking and voting as part of Note taking or Meeting application
Issue tracking and voting should be critical components of our meeting

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