

## Notes 4.6: Managing documents with the MS Office Library template

Interview by Betsy Kosheff

*[Editor's note: This article resides in "Iris Today", the technical Webzine located on the <http://www.notes.net> Web site produced by Iris Associates, the developers of Domino/Notes.]*

With Release 4.6, Notes is an Active Document Container in the purest sense. Ryan Jansen uses this technology to make it easier to navigate between Notes and Microsoft Office 97 applications simply by updating the MS Office document Library Template. In his spare time, he added a couple of cool new mail features.

### What does the Microsoft Office Template do?

It brings in-place editing to Microsoft Office 97 applications. This means a couple of things. One: just as with Active Document support that you get with Notes 4.6's Internet Explorer component and Word and Wordpro as alternate mail editors, you can use these entire applications and their features from within Notes. So you could be using the IE 3 component to browse for research stuff on the Web; then use Word or Wordpro to edit documents or Excel to fill in an expense report and all the applications are borderless. You don't need to load and re-load, and you get all the services that come as part of Notes like replication and security, full text search and database sharing.

### How does in-place editing with Active Documents differ from the way Notes supported using other applications previously?

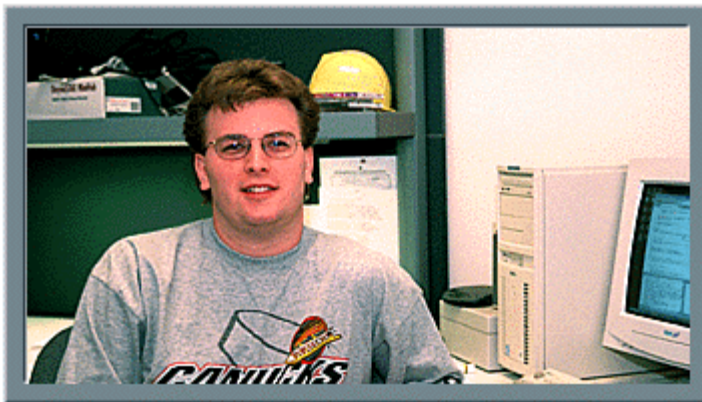
With Notes Release 4 we supported OLE 2.0 "edit in place" functionality so you could use non-Notes applications like a word processor, for example, in place of the Notes editor. But it wasn't a full-screen, completely functional application as you get with Active Documents today.

### Was it hard to implement?

Not really. The cool thing was that once I got the code for the interface for in-place activation to work, I pretty much duplicated the code for the Microsoft Office template. It uses the same set of fields and values; you're just changing the application that gets launched. And since Office supports in-place editing, you can have Excel or Powerpoint load and use Notes as the management environment.

### Can other people re-use the template?

Well, parts of it. Anyone who looks at the template can use it as a model to create their own application and mimic the way we did it on the Office template. There's no need to re-create all of the fields and values or things, like the way the application is launched -- you can just copy the way we did it. None of this functionality is embedded in the application because Active Doc relies on the application you choose to tell it what to do.



**Is Notes a good fit with Active Documents?**

Definitely -- Notes is just a platform for running and disseminating applications, plus, it's very template-oriented, so it's a great combination.

**How much time did this take you?**

It wasn't at all a full-time thing. I started it in January and worked on it part-time, going through a couple of iterations to determine how we wanted the OLE interface to work, and then working out a few bugs.

**So, you had lots of time to do other things?**

Yeah, right.

**But you did some new mail features?**

Well, these were actions we wanted to get into 4.5 but didn't. Specifically, I worked on some tools for better organizing different types of messages and something we're calling automated personal group creation.

**What kind of organization tools?**

Originally, your Notes mail file just contained mail, but then with Notes 4.5, we introduced calendaring and scheduling, and back with Release 4.0, we had added tasks. So the result was that the user might get a mail message, or a to-do item, or a calendar entry from someone and perhaps the format it was sent in was the wrong one. Maybe you got a memo which should have been a calendar entry, for example. So I just created some little actions that make it easier to convert from one type of message to another just by selecting something from the action menu. So, for example, maybe you got a meeting invite that actually had a to-do item in there, so you could select that calendar entry and from it create a brand new task that inherits some information from the calendar entry.

So, this is a way to make sure things get into the right buckets and it's about better re-use of existing information.

**What is automated personal group creation?**

It's a really easy tool that makes it simple to create things like mail lists. Maybe you're working on a project and you're getting a lot of mail from people and you want to create a list from all the messages they've sent you. It takes the information from the different fields in the message collection and lets you create the list with just a few strokes, rather than a lot of hunting, cutting and pasting.

**ABOUT RYAN JANSEN**

Ryan Jansen came to Iris from Lotus in June of 1996. For Notes Release 4.6, he enhanced the document library templates to provide Active Doc support for Microsoft Office, as well as the alternate mail editor templates for Microsoft Word and Lotus Wordpro. In addition, he implemented a number of new mail features like automated personal group creation, and is now working on a new Notes 4.6 server install program.

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