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Noah Mendelsohn.
03/15/95 03:24 PM

To: John Landry@Lotus
cc: Alex Morrow@Lotus, Hene Lang@Lotus
Subject: re: Meeting with Sara Williams Regarding OCX Status and Support

Microsoft continues to informally acknowledge the OCX support problem, and to take small positive steps toward helping us. Subsequent discussions with Sara have been cordial, but no plan has been offered for substantially redressing our core concern: we still don't have and won't soon get get production quality reference implementations of OCX container and server, unencumbered by inappropriate licensing restrictions. We believe that Microsoft application and communication product development groups have had access to such samples for months, and we also believe that they have had direct access to the OCX development team; each day that goes by further limits our ability to compete with those products.

The following summary covers contacts with Microsoft since Sara's January 31st visit:

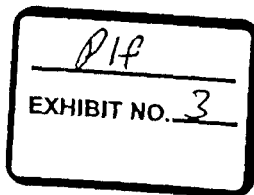
- (Feb. 3) Phone mail message from Sara Williams to me

Sara called on Feb. 3 in the evening and left a phone mail message for me: I still have it because I thought it might be important. Summary:

- Sara said that she had spoken to both Doug Heinrich and "Brad" (I'm presuming Brad Struss, not Brad Silverberg) about her meeting in Cambridge and about our concerns regarding OCX support.
- Doug acknowledges (according to Sara) that OCX support was/is inadequate and that (1) they will try to do something about it and (2) they will try to avoid similar problems in the future. No specifics.
- Sara assumed (incorrectly) that I had seen a note from Doug Heinrich in which he proposed followup activities with Alex. Alex never got the note and has since sent a followup query to Doug, who is on vacation until March 20th.
- Sara invited us to the Nile (new COM/OLE interfaces for database and property access) design review, and we sent two representatives from Lotus. It's not clear why we hadn't already been invited to the design review, but our concerns about OCX support obviously caused them to make a bit of extra effort in this area. Very helpful, but what they really did was to rectify in the last minute another failure to include us in the review process. Still, this is a promising step and I'm hoping to use it as a precedent for their including us in a broader set of betas and reviews in the future.

- (Feb. 21) Summary of phone call to Sara from me

- Sara said that the next step was Alex's, i.e. to respond to Doug. I told her that I had not seen the note, that Alex would be responding, but that the issues had been laid out clearly on several occasions and that we should not wait for yet another exchange of messages to begin resolving what we had all agreed to be a problem: i.e. the lack of effective support for OCX development and the lack of availability of sample implementations. As noted above, Alex never got the note and has sent a followup query to Doug.
- I reiterated my feelings that the support for OLE 2.0, while flawed in its own ways, had been far better than for OCX, and that we had to achieve at least the equivalent more or less immediately. The problem, as I see it, is that Microsoft has used licensed code which they are not prepared to release outside of Microsoft as their own reference implementation(s) for OCX. Sara did say that she was going to look into writing some other reference implementations for distribution outside of Microsoft, but those can't possibly be ready for several months. In the meantime, Microsoft remains at a competitive advantage, with access to reference OCX implementations that we cannot obtain.



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- We discussed other means of support. Sara suggested that we use our premier support contacts for OCX questions. I asked whether there were OCX experts in premier support, and the answer we received was essentially "no". I told her that Lotus is willing to use any reasonable means of contacting Microsoft for support, including premier support, email, phone, etc., but the real issue is the level of expertise of the support personnel and their responsiveness to us. Sara and I agreed that we would use her as an initial point of contact for our questions. This is a useful complement to, but not a substitute for, the missing documentation and reference implementation samples.

With regard to some of the non-OCX related Q&A's from my original note:

- We have accepted Microsoft's invitation to participate in beta testing "Zeppelin", an OLE 2.0 (not OCX) validation tool which is mentioned in one of the Q&A's from my original note. John Meyrick, manager of Aswan QE will coordinate.
- No news at all on Microsoft's adding us to the beta list for VB 4.0, which is the most appropriate test container for OCXs.
- I've seen no further information on OLE features of the Chicago shell. Microsoft may have quietly posted something that we've missed, but I doubt it.

Noah

To: Noah Mendelsohn
cc:
From: John Landry
Date: 03/09/95 06:02:32 PM
Subject: Meeting with Sara Williams Regarding OCX Status and Support

Noah.. can you update this with whatever they've gotten back to us on... thanks.

From: Noah Mendelsohn
Date: 02/03/95 03:54:31 PM
Subject: Meeting with Sara Williams Regarding OCX Status and Support

Sara Williams, an OLE/OCX/Cairo evangelist in Microsoft DRG visited with a group of Lotus developers at Rogers Street on Tuesday afternoon, January 31. Here are minutes of our meeting. The purpose of the meeting was to review Lotus' concerns regarding Microsoft's fairness in supporting OCX development, and to answer other questions regarding OCX and OLE.

Unless otherwise indicated, all questions are from Lotus personnel and all answers are from Sara. Sara has promised to respond by email on all the unresolved points listed below. I've rearranged the order of discussion to put the most useful new information near the top.

Lotus Attendees: Noah Mendelsohn, Scott Kilger, Phil Stanhope, Edward Oguejiofor, Jeff Buxton

Primary topic:

Lack of appropriate support and documentation for OCX. Microsoft applications and tools seem to have an unfair advantage using OCX—how did Microsoft release container apps when nobody is supposed to have sample code yet?

The most important issue we discussed, and the one we spent the most time on, is Lotus' concern that OCX support for ISVs is inadequate, that sample code for containers is not available, that the only server samples are part of MFC and carry restrictive licenses, and that Microsoft has somehow managed to ship products using OCX in spite of these limitations.

Speaking only for herself, Sara indicated that she shares many of these concerns. She also

said that Microsoft as a whole does recognize that there is a problem regarding support for ISV's using OCX.

We emphasized the degree to which we view this as a serious threat to our ability to compete. While there were also problems when OLE 2.0 itself was released, the OCX situation is far worse. For OLE 2.0, Microsoft provided comprehensive published documentation, an extensive support infrastructure, and sample implementations which were of moderately good quality and no more restrictively licensed than the Windows operating system itself. The current situation with OCX is inappropriate. Sara reiterated that she understood our concerns, but said she had not realized the seriousness with which we viewed this problem. She asked what could be done to resolve the problems. Among the possibilities that we suggested were: (1) provide freely licensed production quality sample implementations of container and server immediately...if other samples cannot be provided, remove the licensing restrictions on the relevant parts of the MFC controls implementation and the CDK. (2) publicly acknowledge that OCX is an operating system API, to be supported with at least the same degree of open process as is applied to the windows API and OLE 2.0. (3) Provide open support and immediately redress any advantages which may currently be given to Microsoft applications or tools products in using OCX. (4) Lotus believes that support could be improved and integration with OLE technology streamlined if Microsoft were to transfer OCX development responsibility to their systems organization, but that is ultimately an internal concern of Microsoft.

Sara acknowledged that the problems we highlighted are real, and that many of them do trace to the fact that OCX development is done in the tools group. She promised to promptly review our concerns with Doug Heinrich and other senior managers at Microsoft.

OTHER Q&A

- Q. What OCX containers are available for testing. For which ones is source available?
- A. CPatron (source available, but not a production quality sample), Access (no source), VB 4.0 (Beta-no source), Visual FoxPro (no source). Doesn't know whether EForms has OCX container. Calro shell will.
- Q. What about Mike Blaszczyk's sample container?
- A. Right, that's coming when the MSJ article is published, but it's based on MFC OLE support, so you probably have licensing problems with it. Also Craig Brockschmidt is writing some new white papers on creating an OLE controls container.
- Q. We've heard that Microsoft is contemplating support for 32 bit VBX's after all.
- A. I've heard nothing about it and I can't imagine why we would do that.
- Lotus: Because VBX vendors are telling you that OCXs are too hard to build and that they have too much overhead.
- A. I haven't heard that and I think I would know about any change in strategy. It's still: VBX is 16 bit only, OCX is preferred, and on 32 bit, it's the only option.
- Q. Is OCX on the Mac? Will it be? What about other Wise platforms?
- A. Don't know...will check. At best, Wise platforms would lag significantly.
- Q. Will the OLE documents extensions previewed last week apply to OLE Controls.
- A. I would think so. (BTW, I'm not sure she's right about that. Some of the OLE documents extensions are implemented in the OLE default handler, which is not normally used by OLE controls.)
- Q. Tell us about OCX futures.
- A. There is an improved CDK in the new Visual C++, just out. Beyond that, can't say much. A strange situation has arisen within Microsoft according to Sara. Although the Developer Relations Group (DRG) of which she is a part is organizationally affiliated with the Tools Group (i.e. languages, data bases, etc.), DRG actually has a much closer working relationship with the

systems organization. See discussion above.

- Q. Can we get the VB 4.0 beta? It's the only useful example of a production quality OCX container with scripting.
- A. Will check.
- Q. The lack of clear OCX documentation is aggravating a problem we've had with OLE 2.0 since the beginning: everybody's doing it differently.
- A. Microsoft is working on a validation suite for OLE 2.0 to test interoperability. First wave may see this in the next couple of months. Not clear whether this applies to OCX—I suspect not (NRM).
- Lotus: Great, something like this is needed, but please make sure that ISV's get to comment before the validation suite is frozen. Compatibility checking is important, but let's make sure you're not preventing our apps from doing what they need to do.
- Q. Do you have more information on apartment model threading in OLE?
- A. Apartment model threading will be supported in Win95 and NT 3.5.1. Should be in current win95 builds on ISDN. Fundamentally, each COM object does its work on a single thread. Sara is currently writing a white paper, with sample code. It will (probably) be available within the next 2 weeks or so on the ISDN server.
- Q. When will a common .EXE be usable with the OLE .DLLs on NT and Win95?
- A. Don't know. Will check.
- Q. What are the details of OLE support in the Chicago shell? Why was Lotus told that the shell would not be OLE enabled when in fact it is? Why was Lotus not given earlier warning if there was a change of plan? We're still lacking useful documentation on OLE in the shell—is there any?
- A. Sara didn't seem to be familiar with the history of this problem, or with any of the details of OLE enabling in the shell.
- Q. DLLs have advantages over .EXE's in terms of performance and flexibility, but doesn't the OCX architecture take us back to where we were with Win16 in terms of programs (in this case components) impacting each others' integrity? Also: Isn't this an incredibly powerful opportunity for those writing Trojan horses, viruses, etc?
- All: This question generated quite a length discussion, but Sara didn't seem to know whether anyone at Microsoft had given this serious consideration, whether there is an official corporate position on the problem, or whether there are any specific efforts planned to minimize the impact. The Lotus attendees expressed a strong concern that these were serious problems. It's ironic that we've waited for robust, secure, 32 bit operating systems as the appropriate environment for OLE, and now we're looking at running multiple components within the same process space. (Noah's observation, not expressed at the meeting: this is why the research community is looking at special purpose operating systems and special purpose hardware to support component based architectures. It's difficult to get good performance with good isolation using convention processors and OS's.)

Noah