



The Iam Lotus User Group

“Kum Bah Yah” meets “Lets Kick Butt” : The Integration of IBM Lotus Notes and Domino with Microsoft Office, .NET, and IBM Lotus Symphony

**John Head
PSC Group, LLC**

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The Iam Lotus User Group



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Before we begin

- ***Please turn off/set to vibrate/mute all***
 - ♦ ***Cell Phones***
 - ♦ ***Pagers***
 - ♦ ***Computers***
- ***Please remember to fill out your evaluations***

Agenda

- **Introductions**
- **“Getting Started” with Integration**
- **Advanced Integration**
 - ♦ From the Notes Client
 - ♦ From other applications
- **Looking Forward**
- **Q & A**

Who am I?

- **John D. Head**
 - ♦ Director of Enterprise Collaboration at PSC Group, LLC
 - ♦ Involved in Lotus technology since 1993
 - ♦ OpenNTF.org Steering Committee Member and IP Working Group Chairman
- **Speaker**
 - ♦ Over 30 sessions at Lotusphere since 1996
 - ♦ Speaker at Lotus Developer, ILUG, UKLUG, MWLUG, IamLUG, & TriStateLUG conferences
- **Author**
 - ♦ Publications on Office and SmartSuite integration with Notes
 - ♦ LotusUserGroup.org contributing Author and Forum moderator
 - ♦ “Lotus Symphony for Dummies” Technical Editor
 - ♦ “Self Assessment and Strategy Guide for Migrating from Domino Document Manager “ Redbook Author



PSC Group, LLC

IBM Premium Business Partner for 20+ Years

Microsoft Gold Partner

Notes & Domino 8.5.X Design Partner

OpenNTF.org Alliance Member, Steering Committee Company, & Former Host of OpenNTF.org

Sponsor of lamLUG in 2009 & 2010

Winner of 2007 & 2009 Lotus Award!



■ **Host of the following blogs:**

- ▶ **Ed Brill's**
(www.edbrill.com)
- ▶ **Lotus Design Blog**
(Mary Beth Raven)
(www.notesdesign.com)
- ▶ **LotusStaffNotes (Brent Peters)**
(www.lotusstaffnotes.com)
- ▶ **Lotus Connections team**
(synch.rono.us)
- ▶ **Domino Server Team**
(www.dominoblog.com)
- ▶ **Lotus Mashups**
(www.mix-and-mash.com)
- ▶ **Chris Pepin – IBM CTO's Office**
(www.chrispepin.com)

This Year, We Started Over

- **We have rebuilt this presentation from the ground up**
 - ◆ Reorganized
 - ◆ All New Demos
 - ◆ Take Advantage of the modern software versions
 - ▶ **Notes 8.5.X**
 - ▶ **Office 2007**
 - ▶ **Symphony 1.3**
 - ▶ **.NET 3.5**
 - ▶ **Visual Studio 2008**
- **Much of the basics of integration have had to be left out ...**
- **But you can access our presentation from last year for all of the basic steps – link provided later**

The Demo Databases

Presentation example database

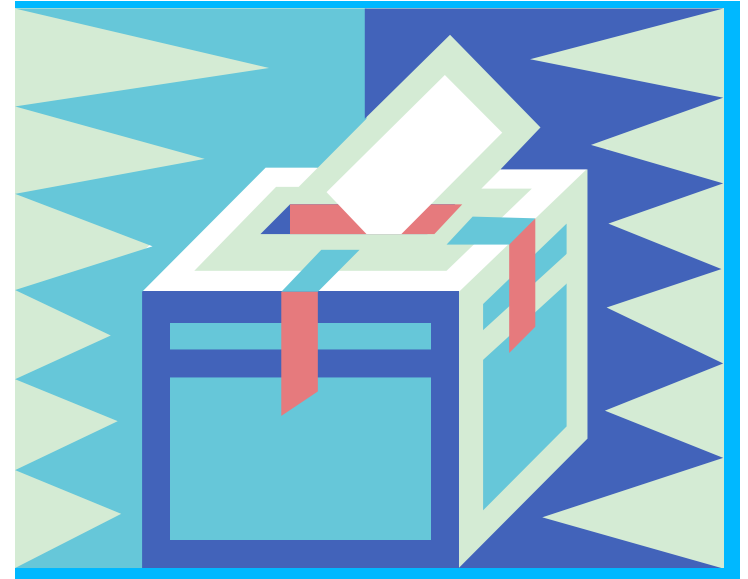
- Contains all of the “Getting Started” Demos
- Works in your Notes Client
- Configurable for your environment
- New UI for Rich Client, works in Standard client as well

OpenNTF.org Contacts Experience

- Customized Notes 8.5.1 Contacts Template
- Version on server for web and web services demos

Let's take a little poll ...Who is using ...

- Office 97 and earlier
- Office 2000
- Office XP
- Office 2003
- Office 2007
- Office 2010
- OpenOffice / StarOffice
- Lotus Symphony
- iWork
- Other



Integration History

- **1994**
 - ▶ DDE with Ami Pro
- **1996**
 - ▶ Notes R4
 - ▶ OLE
 - ▶ LotusScript
 - ▶ VBA
- **1997**
 - ▶ SmartSuite with LotusScript (Word Pro)
- **1998**
 - ▶ Notes R5 with COM support
- **2001**
 - ▶ Notes Domino 6
- **2004**
 - ▶ Notes Domino 6.5 with LS2J and DXL
- **2005**
 - ▶ Notes Domino 7 with Web services
- **2007**
 - ▶ 2007 Office System
 - ▶ Lotus Notes/Domino 8
 - ▶ Lotus Symphony
- **2008**
 - ▶ Visual Studio 2008
 - ▶ Notes/Domino 8.5
- **2009**
 - ▶ Notes 8.5.1
 - ▶ Domino Designer in Eclipse
- **2010**
 - ▶ Office 2010
 - ▶ Visual Studio 2010
 - ▶ Notes 8.5.2
 - ▶ Symphony 3.0

The Good News

- **We have entered the “Industrial Revolution” period of the Integration Era**
- **In the “Medieval Times”**
 - ▶ **DDE with Ami Pro**
 - ▶ **NotesSQL was used to get even the most basic of data**
 - ▶ **OLE embedding**
 - ▶ **Notes F/X**

The Good News (continued)

□ The Renaissance brought us new tools

- ▶ OLE automation
- ▶ COM automation
- ▶ And much more

□ The Revolution brings us major changes

- ▶ A true competitor to Office
- ▶ Visual Studio.NET 2008 and VSTO 3.0
- ▶ Code begins to move from inside a document to complete applications

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“Getting Started” Demos

- **Each demo is the equivalent of a “Hello World” sample**
- **They are self contained and as little code as possible**
 - ♦ **No error trapping, etc**
- **This will get you started with Integration**

Getting Started Demos

- **Word**
- **Excel**
- **PPT**
- **Project**
- **Symphony Documents (UNO)**
- **Symphony Spreadsheets (UNO)**
- **Symphony Presentations (UNO)**
- **Symphony Documents (LS API)**
- **Symphony Spreadsheets (LS API)**
- **Symphony Presentations (LS API)**
- **VBA**
- **VB.NET**
- **C#**

Getting Started – Microsoft Word

- **“Getting Started” demo #1**
- **Demonstrates how to use LotusScript to have Notes automate Microsoft Word**



Getting Started – Microsoft Excel

- **“Getting Started” demo #2**
- **Demonstrates how to use LotusScript to have Notes automate Microsoft Excel**



Getting Started – Microsoft PowerPoint

- **“Getting Started” demo #3**
- **Demonstrates how to use LotusScript to have Notes automate Microsoft PowerPoint**



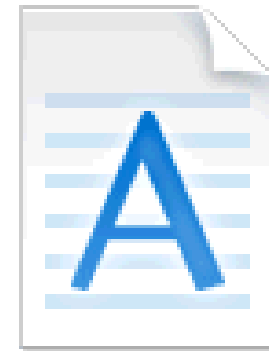
Getting Started – Microsoft Project

- **“Getting Started” demo #4**
- **Demonstrates how to use LotusScript to have Notes automate Microsoft Project**



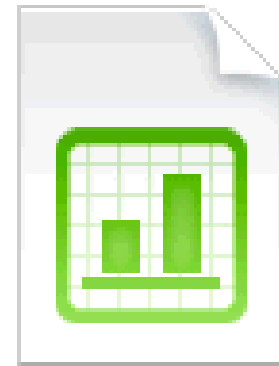
Getting Started – Symphony Documents UNO

- **“Getting Started” demo #5**
- **Demonstrates how to use LotusScript to have Notes automate Lotus Symphony Documents via UNO**



Getting Started – Symphony Spreadsheets UNO

- **“Getting Started” demo #6**
- **Demonstrates how to use LotusScript to have Notes automate Lotus Symphony Spreadsheets via UNO**



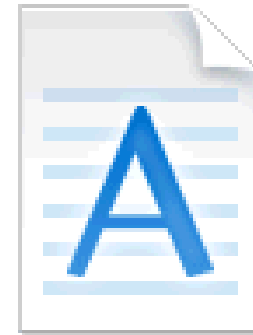
Getting Started – Symphony Presentations UNO

- **“Getting Started” demo #7**
- **Demonstrates how to use LotusScript to have Notes automate Lotus Symphony Presentations via UNO**



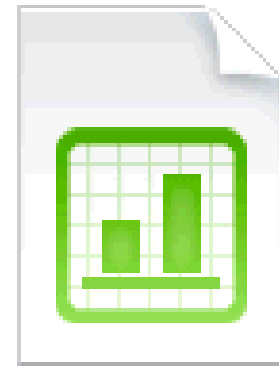
Getting Started – Symphony Documents LotusScript

- **“Getting Started” demo #8**
- **Demonstrates how to use LotusScript to have Notes automate Lotus Symphony Documents via the new LS API**



Getting Started – Symphony Spreadsheets LotusScript

- **“Getting Started” demo #9**
- **Demonstrates how to use LotusScript to have Notes automate Lotus Symphony Spreadsheets via the new LS API**



Getting Started – Symphony Presentations LotusScript

- **“Getting Started” demo #10**
- **Demonstrates how to use LotusScript to have Notes automate Lotus Symphony Presentations via the new LS API**



Getting Started – VBA

- **“Getting Started” demo #11**
- **Demonstrates how to use Visual Basic for Applications (from within Microsoft Word) to access Lotus Notes**

Getting Started – VB.NET

- **“Getting Started” demo #12**
- **Demonstrates how to use Visual Basic .net (from within Visual Studio.net 2008) to access Lotus Notes**

Getting Started – C#

- **“Getting Started” demo #13**
- **Demonstrates how to use C# (from within Visual Studio.net 2008) to access Lotus Notes**

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Advanced integration from the Notes Client

From your Contacts application:

- **Create Letter**
- **Create Envelope**
- **Mass Mail Merge**
- **Export**
- **Create Presentation**

This requires that you replace the design of your Contacts application with the OpenNTF.org Contacts Experience template

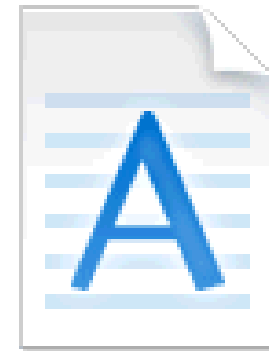
Advanced integration from the Notes Client - Create Letter

- **From your Contacts, create a new letter for the selected contact in Microsoft Word.**
- **Allow the user to select from custom templates**



Advanced integration from the Notes Client - Create Letter

- **From your Contacts, create a new letter for the selected contact in Lotus Symphony Documents.**
- **Allow the user to select from custom templates**



Advanced Integration - Create Envelope

- **From your Contacts, create a new envelope for the selected contact in Microsoft Word.**



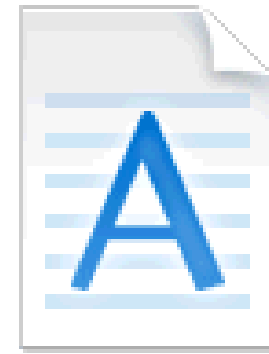
Advanced Integration - Mass Mail Merge

- **From your Contacts, create a mass mail merge for the selected contacts in Microsoft Word.**
- **Allow the user to select from custom templates**



Advanced Integration - Mass Mail Merge

- **From your Contacts, create a mass mail merge for the selected contacts in Lotus Symphony Documents.**
- **Allow the user to select from custom templates**



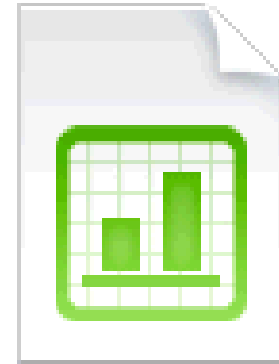
Advanced Integration - Export

- **From your Contacts, export selected fields for the selected contacts in Microsoft Excel.**



Advanced Integration - Export

- **From your Contacts, export selected fields for the selected contacts in Symphony Spreadsheets.**



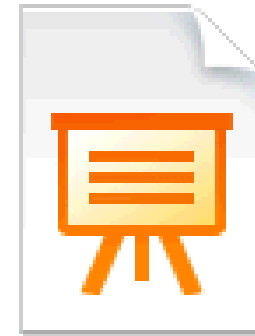
Advanced Integration - Create Presentation

- **From your Contacts, create a presentation for the selected contact in Microsoft PowerPoint.**
- **Allow the user to select from custom templates**



Advanced Integration - Create Presentation

- **From your Contacts, create a presentation for the selected contact in Symphony Presentations.**
- **Allow the user to select from custom templates**



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Advanced Integration from other applications

- **Easy Spreadsheets using Notes Data**
- **Insert Image**
- **Insert Slide**
- **Notes Explorer**

Advanced Integration - Easy Spreadsheets using Notes Data

- **Create spreadsheets that import Contact data**
- **Auto Refresh**
- **Generate Charts**
- **Get data via a web service**

Advanced Integration - Insert Image w/ Microsoft Word

- **Using a custom VSTO solution, add an Insert Image Ribbon, menu item, and sidebar that allows for easy image insertion from a Notes repository.**

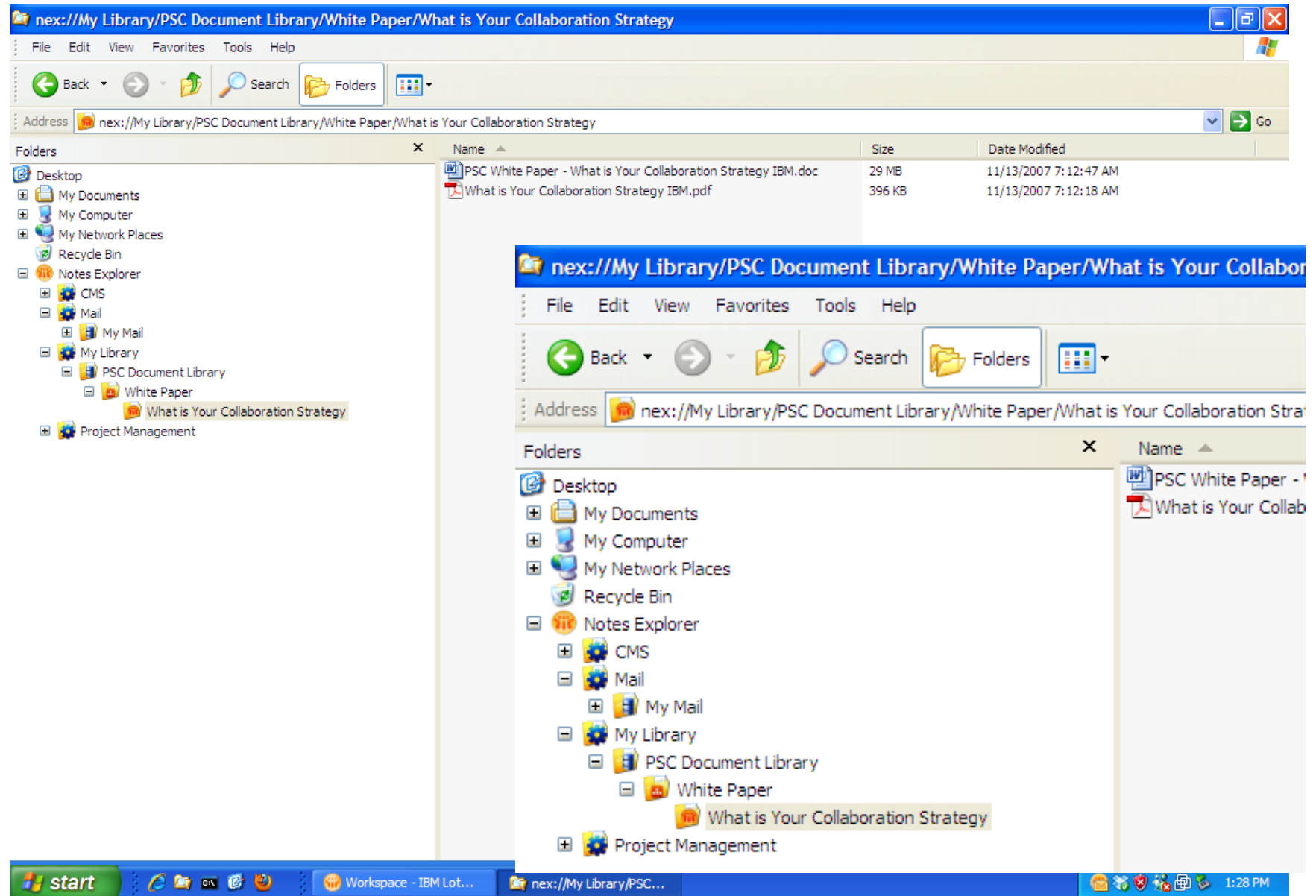
Advanced Integration - Insert Image w/ Symphony Documents

- **Using a custom Symphony Plug-in, add an Insert Image menu item and sidebar that allows for easy image insertion from a Notes repository.**

Advanced Integration - Insert Slide

- **Using a custom VSTO solution, add an Insert Image Ribbon, menu item, and sidebar that allows for easy image insertion from a Notes repository.**

Notes Explorer



Notes Explorer Details

- **Windows Addin**
 - ◆ Extends Windows Explorer
 - ◆ Not a Windows Service
 - ◆ Supports Limited Rights User
- **Works in any Windows Application**
- **Works with Windows Search**
- **NEX Protocol mimics UNC functionality**
- **Immediate Attachment Sync**
- **Zip file exploration**
- **Support for Windows XP, Vista, and Windows 7**
- **Support any Notes database**
 - One hidden view added
- **Works with local and server databases**
- **Support for multi-database applications**
- **Create New Documents**
- **Properties Panels Dynamic**
- **Supports Notes Single Sign-On**
- **Works with Notes 5, 6, 7, 8, and 8.5.X**

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2010 and Beyond

- **We finally have great tools**
 - ◆ DDE
 - ◆ Visual Studio 2010 with VSTO 4
 - ◆ Office 2010
 - ◆ Office 2010 Backstage
- **Great Tools Coming**
 - ◆ Symphony 3.0 (in beta now)
- **New/Updated APIs for Notes Data**
 - ◆ REST
 - ◆ DXL
- **We have multiple options**
 - ◆ Office, Symphony, OpenOffice.org, Google Docs, etc.
 - ◆ Competition will be good for us ... if we can deal with all the changes

Automation vs. Generation

- **Document Generation is starting to become a viable option**
 - ♦ Using the standard formats of OOXML, ODF, and PDF
 - ♦ Instead of requiring the application to be present, this is done with no interaction of any application
- **Tools**
 - ♦ C# and the OOXML Toolkit for Office
 - ♦ Java and the upcoming ODF Toolkit from IBM for Symphony
 - ♦ Numerous PDF APIs and Toolkits for both .NET and Java
- **Can generate server side in a fraction of the time**
- **Here is a demo of what we are doing with Document Generation ...**

Resources

- **LDD Discussions (Notes.Net)**
 - ♦ <http://www-130.ibm.com/developerworks/lotus>
- **OpenOffice.org**
 - ♦ <http://www.openoffice.org>
- **OpenOffice Developers Guide**
 - ♦ <http://api.openoffice.org/DevelopersGuide/DevelopersGuide.html>
- **Programming OpenOffice with Visual Basic**
 - ♦ http://www.kalitech.fr/clients/doc/VB_APIOOo_en.html
- **Microsoft Office developer's Web site**
 - ♦ <http://msdn2.microsoft.com/en-us/office/default.aspx>
- **Microsoft Developer Network**
 - ♦ <http://msdn.microsoft.com>

Resources (cont.)

- **Microsoft Office blog listing**
 - ♦ <http://msdn2.microsoft.com/en-us/office/aa905342.aspx>
- **OpenNTF.org — the open source Web site for Notes**
 - ♦ www.openntf.org
- **Integra4Notes Web site**
 - ♦ www.integra4notes.com
- **Slides and content available from**
 - ♦ <http://www.johndavidhead.com>

PLANET LOTUS

Planet Lotus (www.planetlotus.org) is an aggregation of Lotus related blogs and news



IdeaJam (www.ideajam.net) is a place where people can post and share their ideas, and gauge the marketability, popularity and viability with input from others



OpenNTF (www.openntf.org) is a site devoted to getting groups of individuals all over the world to collaborate on Lotus Notes/Domino applications and release them as open source



IBM's Official portal for developers including a dedicated section for Lotus (www.ibm.com/developerworks/lotus)



Bleedyellow.com provides community implementations of Lotus Connections and Sametime



Lotus Greenhouse (greenhouse.lotus.com) is a live community website where you can use Lotus Collaboration Products for free!



LotusUserGroup.org is the on-line home of the IBM Lotus community for regional and virtual user groups

The Lotus Community Podcasts





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