



Microsoft®

Microsoft® Office **White Paper**

for Windows® 95

Solutions

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The Chart House

In the fall of 1993, the Chart House Enterprises, with over 60 upscale restaurants throughout the United States, implemented a customer service program - the Aloha Frequent Diner program - in an effort to increase customer dining frequency. The program was modeled after frequent flier programs made popular by commercial airlines. Aloha program participants accrue points whenever they dine at a Chart House restaurant, with additional points available for customers who dine at Chart House restaurants in different locations. Accumulated points can be used for free meals and other benefits, with the highest point level providing an around-the-world airline ticket.

Initially, the program was a tremendous success, with tens of thousands of customers signing up every month. The outside firm that the Chart House had contracted to administer the program had implemented a paper-based system for logging and tracking customer records. Within weeks of the launch of the Aloha program, it became evident that the paper-based administrative system was not keeping pace with customer demand. Chart House customer service representatives were receiving phone calls from Aloha program participants inquiring about their membership and point status - it was taking days to retrieve such information and get back to customers with it. Additionally, the Chart House found it had no access to information on customers enrolled in the program, or any numerical data by which to judge the program's success. By March of 1994, over 100,000 customers had enrolled in the Aloha program, but the administrative system had fallen so far behind that customers who had joined the program in December were not yet showing up on membership lists.

The Chart House knew that the frequent-diner concept was gaining acceptance by customers. However, the paper-based system employed to administer the Aloha program was putting the program's success at risk. It was in March that the Chart House sought out the services of WinResources, a Microsoft Solution Provider partner based in Southern California that specializes in client-server systems. The Chart House needed to replace their outside administrative system as quickly as possible to keep the Aloha program from failing. WinResources presented Chart House with a new system design based on Microsoft Office and Microsoft BackOffice™ - the proposed system would automate Aloha program administration, while bringing the administration in-house. The Chart House contracted with WinResources to build the entire system in three months.

On July 5, the Chart House rolled out the new system developed by WinResources, and immediately began realizing tremendous benefits in administering the Aloha program. The new system was made up of a server component and four client components. The heart of the server component was the Microsoft SQL Server™ relational database management system running under Windows NT™ Server on a Compaq® Pro Linea computer. The SQL Server database was used as the primary storage device for all Aloha customer records. The four client components included a Microsoft Visual Basic® application for entering and retrieving customer records, an application created with Microsoft Access for generating customer reports, a Microsoft Excel application for analyzing the profitability of the program, and a combined Microsoft Word and Microsoft Mail application for generating customer letters. All four client components connected directly to the SQL Server database running under the Windows NT operating system, providing instant access to customer data.

The new system developed by WinResources allowed the Chart House to realize immediate improvements in customer service. Information on customer membership status that once took days to retrieve was now available within seconds. Chart House customer services representatives could use the new Visual Basic client application to actually retrieve customer account information while the customer was on the phone. Additionally, the new system allowed Chart House executives to use Microsoft Access and Microsoft Excel to analyze customer demographics and program profitability, enabling them to make better decisions in managing the Aloha program. And, perhaps of primary importance, the new system provided the Chart House with a tool that allowed them to quickly and effectively communicate with their customers.

WinResources was able to develop the new Aloha system for the Chart House in a three month period, with only three developers working on the project. What technologies enabled WinResources to develop the Chart House client-server system so quickly? Why did WinResources choose Microsoft Office and BackOffice as the platform for the system? Are there ways in which such systems can benefit your organization? These and many more questions will be answered in the pages that follow, as we take a look at the technologies provided in Microsoft Office and BackOffice that allow rapid development of powerful client-server solutions.

Applications Software Automates Routine Tasks

With the advent of new personal computing technologies over the past fifteen years, companies have realized substantial gains in efficiency in running their day-to-day operations. Such gains have resulted for the most part from installation of standalone and networked personal computers running general business applications software such as spreadsheets, word processors, desktop databases and presentation graphics software. Out of the box, these applications have provided tools to help people finish work in less time, while attaining a higher level of quality in the work they do.

While personal computers gained market acceptance by providing businesses with efficiency gains over the mechanical devices they replaced, Microsoft Office has gained market acceptance for the same reason - by providing businesses with efficiency gains. Five years ago, no companies were using Microsoft Office - yet, today, most companies are using Microsoft Office. Companies have chosen Office for the primary reason that Office applications allow them to get more done with less effort and at a lower cost. In the mid-1980s, Lotus® 1-2-3®, WordPerfect® and dBase® were leaders in the personal computer software market - all provided tools that allowed companies to realize tremendous efficiency gains. Yet, over the past ten years, fierce competition has led to numerous software innovations and has resulted in a much different competitive landscape. Today, Microsoft Office is a clear leader in business applications software - more companies run their business on Office than any other desktop applications suite.

Microsoft Office for Windows 95 Lets You Get Work Done Faster

How does Microsoft Office for Windows 95 allow companies to realize efficiency gains in their day-to-day business? To begin with, Office takes full advantage of Windows 95, a modern 32-bit operating system that gets the most out of today's personal computer while breaking new ground in terms of ease of use. Office provides powerful tools in the areas of document creation/management, data analysis, database access, presentation graphics, and personal information management - tools that can be used to complete general business tasks in less time. In addition, Office for Windows 95 offers better integration among Office and Office-compatible applications; second-generation IntelliSense™ technology to help make complex tasks easy and simple tasks automatic; and enhanced networking and workgroup support, to help users communicate better in an increasingly connected world. Let's take a brief look at the products in Microsoft Office.

MICROSOFT OFFICE SHARED FEATURES

One aspect of Microsoft Office that has set it apart from its competitors is the high degree of integration among the various Office applications, and this is now truer than ever. Menus and toolbars have a consistent look and feel across all Office for Windows 95 applications, as do dialogs for common operations such as creating, opening, and printing files. The Office File Open dialog supports indexed searches, and searches based on document statistics or user-defined properties. The Office Binder allows related data and documents from several different applications to be gathered together into a single convenient container. AutoCorrect, now available in all Office applications, corrects spelling errors as you make them - incorrectly enter "teh" and AutoCorrect will correct your error to "the" before you can type the next word. The Answer Wizard searches for and displays help topics in response to a query typed in natural language. And the Office File New and File Open dialogs have been redesigned to acknowledge the fact that users think of their work in terms of the type of documents they create, rather than in terms of the application that was used to create that document.

MICROSOFT WORD

As the world's best-selling word processing software program, Microsoft Word allows you to do much more than create and print documents. Among Word's numerous powerful features are its Spell-It and AutoFormat utilities. Spell-It spell checks your document as you type, making it easier to correct errors as you go, and making spell-checking faster if you prefer to do it only when the document is complete. AutoFormat takes unformatted text and applies a complex heuristic of over 600 formatting rules to create a professionally formatted document as you type. Other features include WordMail, which allows Word to be used as the Microsoft Exchange electronic mail editor, bringing rich-text formatting and the power of a full-featured word processor to the task of creating electronic mail messages. Word Internet Assistant and Word Viewer make it easy to create, share, and explore information on the Internet. Word's Tables, Mail Merge, Bookmarks, Revision Marking and numerous other features make Microsoft Word a powerful tool for creating and managing documents.

MICROSOFT EXCEL

Microsoft Excel is the world's leading spreadsheet, as well as one of the most powerful data analysis software programs available on the market. Among the many powerful data analysis features of Microsoft Excel, the PivotTable[®] is perhaps the most powerful. PivotTables allow you to analyze numerical data from Microsoft Excel spreadsheets or external databases in various different dynamic views - giving you greater insight and understanding of large data sets. In Microsoft Excel for Windows 95, the recalc engine has been re-engineered to provide performance improvements of up to 50 percent in some areas. Microsoft Excel also provides a powerful charting engine with over 90 different chart types, and a Data Map add-in that can display complex data geographically. Microsoft Excel has numerous other data analysis features, including a robust spreadsheet engine with hundreds of built-in business and financial functions, data consolidation tools, scenario management, list sorting and filtering, advanced statistical functions and multi-variant problem-solving. The power and flexibility of the Microsoft Excel spreadsheet, the tight integration of Microsoft Excel with Microsoft Access, and the enhanced workgroup features of Microsoft Excel for Windows[®] 95 give you the tools to convert data into useful information, helping you to make better decisions in running your business.

MICROSOFT ACCESS

Microsoft Access is a powerful relational database management system that meets the needs of a wide spectrum of users - from novice users to application developers. For new users, Microsoft Access provides wizards for creating tables, queries, forms and reports - it's easy to build a simple database for tracking customers or entering orders. Wizards are also available for working with Microsoft Excel data from within Microsoft Access, and for converting flat-file or spreadsheet data into a Microsoft Access relational database. More advanced users can take advantage of validation rules, relationships, linking external tables and the powerful Data Access Objects in creating robust database applications. Combined with Microsoft SQL Server, Microsoft Access acts as a powerful front-end tool for client-server applications. By allowing business people to interactively locate and report on enterprise data stored on BackOffice servers, Microsoft Access ultimately helps them make better business decisions based on up-to-date information.

MICROSOFT POWERPOINT

The Microsoft PowerPoint® presentation graphics program provides tools for creating powerful and compelling business presentations. With a wide array of graphics and presentation formatting features, PowerPoint makes it easy to present your ideas graphically. PowerPoint sports a host of powerful features. The AutoContent, StyleChecker, and AutoClipArt Wizards automate the process of building a presentation. Slide transitions and build effects add interest to your presentations. Write-up transfers an outline of your slide presentation to Microsoft Word. Meeting Minder and Presentation Conferencing make PowerPoint more versatile, allowing you to use it in meetings, informal presentations, or online conferencing. Numerous multimedia effects are available, including embedded sounds and video clips. PowerPoint gives you the tools to embellish your ideas - to make them stand out and have a greater impact on your audience.

MICROSOFT SCHEDULE+

Microsoft Schedule+ is a powerful time management program that incorporates task management, group scheduling, and contact management into one easy-to-use application. A flexible user interface allows users to view appointments and work with to-do lists in a way that suits their work style the best. The contact manager stores and organizes important names, addresses, and contact information. Names and addresses from Schedule+ can be easily inserted into a Microsoft Word document via the Microsoft Word InsertAddress toolbar button. The Schedule+ Planner view makes group scheduling easy: users can display available times for people and resources such as conference rooms, and use the Meeting Wizard to automatically select a time when everyone is free.

MICROSOFT PROJECT

In addition to the Office applications listed above, there is one additional Microsoft application that, while not part of the Office suite, adds substantial functionality to Office. Microsoft Project, as one of the leading project management software packages for the personal computer, makes it easy for you to manage complex projects, giving you the tools to develop and manage schedules and delegate tasks to appropriate resources. Providing Planning Wizards, Gantt and PERT Charts, an advanced reporting module, and enhanced workgroup support through tight integration with Microsoft Mail and Schedule+, Microsoft Project is powerful enough to be used as part of an enterprise solution, but accessible enough to be used by anyone with a project planning need..

Custom Solutions

While general business applications provide powerful tools for completing day-to-day business tasks, companies often encounter processes that are difficult to complete even with the features provided by applications software. For example, compiling a budget usually involves gathering and consolidating data from numerous sources into a single spreadsheet. While the spreadsheet provides advanced tools for analyzing and summarizing data, the process of consolidating data can actually be quite difficult. Another example is a simple order entry system. While it is easy for a user to employ a desktop database to create an order entry tool, the process of distributing that tool to others, as well as tying it to the company's central accounting system, may be beyond the means of the average user. Traditionally, companies have employed the talents of corporate developers in creating custom applications to handle such processes. And in the past, developers have looked to high-end development languages such as C or C++ to create custom systems. Past systems based on these high-end programming languages, while serving well the tasks they were created to address, tended to be very costly to develop and very difficult to modify and maintain. In the late 1980s, it was quite common for the development of a corporate budgeting system to require a staff of C programmers working two or more years.

However, by the early 1990s, developers began realizing that the rapid pace of advancements in computing technology would render the products of two-year development cycles obsolete by the time they were completed. The introduction of visual programming tools in the early 1990s placed, perhaps, the greatest pressure on shortening development cycles for custom business solutions. Tools such as Microsoft's Visual Basic programming environment allowed developers to create custom applications in a fraction of the time required by using C or Pascal. With the shortening of development cycles and the proliferation of personal computers in corporations over the past four years, the demand for custom solutions that automate business processes has increased significantly, forcing corporate developers to search out new tools that will allow them to create more powerful solutions in less time.

The Microsoft Office Solutions Platform

While Microsoft Office is considered by many to be a set of powerful desktop applications, Office is also a very powerful development platform for creating custom solutions. Three features make Office a compelling solutions platform: programmable and reusable components; a common programming language; and built-in support for OLE, including OLE automation, embedding and linking, visual editing, and drag and drop. All of these capabilities of Office work together, allowing you to create more powerful applications in less time.

POWERFUL COMPONENTS

At the heart of the Office Solutions Platform is the same functionality provided by the end-user features in Microsoft Office products - document creation/management features in Microsoft Word; data analysis features in Microsoft Excel; database access features in Microsoft Access; presentation graphics features in PowerPoint; and time- and contact-management features in Schedule+. Because of the way Microsoft Office applications have been designed, the key features in each application are available to the corporate developer as a set of reusable, programmable components, or "objects." Office components can be controlled and incorporated into a business solution by using the Visual Basic for Applications® programming language. For example, by writing a program that defines and uses a Microsoft Excel "chart object," a corporate developer makes the very powerful charting functionality of Microsoft Excel an integral part of the custom application. In the same way, using a Microsoft Access "report object" as part of a business solution provides the custom application with all of the versatile reporting features of Microsoft Access. Using Office components allows developers to create custom solutions with less code, which in turn results in shortened development cycles and the increased likelihood of meeting the demand for custom solutions from corporate users. Using Office components has the added benefit of adding stability and standardization to the business processes where they are used.

Microsoft Office provides one of the richest set of programmable, reusable components of any development platform available on the market. In total, Office provides over 300 objects, representing millions of lines of code written by Microsoft in-house developers. Office components are of the highest quality, built by some of the world's best software developers at Microsoft and subject to some of the software industry's most rigorous design and testing requirements. By using Office components, corporate developers can create higher-quality custom solutions that deliver more power - and Office makes it possible to build such solutions in a lot less time.

A COMMON PROGRAMMING LANGUAGE

While Office components allow developers to create custom solutions with less code, some code must still be written for most solutions, although it is possible to build a solution that contains no code at all. Microsoft Office provides a common programming language that makes it easy for developers to write code that controls Office objects. If a developer is familiar with Visual Basic for Applications in Microsoft Access, then it will be very easy for the developer to use Visual Basic for Applications in Microsoft Excel or Microsoft Project, or the WordBasic language in Microsoft Word. Office programming languages should be looked upon as the "glue that ties Office components together" in a custom solution. For example, if developer is creating a custom solution that involves taking data out of a Microsoft Excel worksheet object and placing it into a Microsoft Excel chart object, the developer would write code as a part of the solution to "glue" together the worksheet and chart objects. Currently, Visual Basic for Applications is included in Access, Excel, and Project, and will be included in Microsoft Word and Microsoft PowerPoint in future releases.

OLE SUPPORT

Quite often, developers will find the need to pair data from one Office application with data from another. For example, a developer might determine that the most efficient way to create a data analysis system is to come up with a tool that combines a Microsoft Access report object with a Microsoft Excel chart object. However, the Microsoft Access report object and the Microsoft Excel chart object exist in different applications - Microsoft Access and Microsoft Excel, respectively. Microsoft Office supports a technology called OLE (pronounced like the Spanish word *olé*) that allows developers to combine objects from different applications into a single custom solution. The user-interface features of OLE - embedding and linking, visual editing, and drag and drop - make it easy for an end-user to work with data from several different sources in a single document without having to worry about where that data came from. OLE Automation makes it easy to choose the most appropriate way to present and work with data; developers can create a single custom solution based on components from several different sources.

THE OFFICE PLATFORM

In summary, the Microsoft Office Solutions Platform has three key features: a rich set of programmable, reusable components; a common programming language, Visual Basic for Applications, the glue that ties objects together; and support for OLE, which allows components from different applications to be combined into a single custom solution. All three of these features of the Office Solutions Platform lead to the same result - providing developers the tools they need to create powerful solutions in less time. By taking advantage of the development capabilities provided by Office, companies can automate business processes and create systems that allow for more effective delivery of information to decision-makers. And such systems can be easily created using the tools which are already standard on the desktop - those provided by Microsoft Office.

Microsoft BackOffice

Microsoft BackOffice provides the relational database management, messaging, systems administration, and mainframe connectivity services that allow you to extend Office solutions to the entire enterprise. Based on Microsoft Windows NT Server, BackOffice provides the necessary server tools for creating powerful multi-user applications that allow the users within your organization to access information in central corporate databases, as well as easily share information with each other. Solutions developed with Microsoft Office and BackOffice streamline processes within your organization and provide the means for accessing and understanding more information, allowing decision-makers within your organization to make better decisions. Let's take a look at the products that make up the Microsoft BackOffice

MICROSOFT WINDOWS NT SERVER

Microsoft Windows NT Server provides a powerful and robust server operating system for managing your organization's data and messaging services. Providing advanced security and network management, Windows NT serves as the platform for the Microsoft BackOffice. Windows NT provides the power and security for effectively managing high network traffic, ensuring that users gain optimal access to information.

MICROSOFT SQL SERVER

As Microsoft's premier server-based relational database management system, Microsoft SQL Server provides one of the most powerful database systems for personal computer-based applications. Running under Windows NT, SQL Server offers a high-performance system capable of handling quick execution of queries from multiple users in a network environment. Microsoft's ODBC (Open Database Connectivity) standard gives developers the pathway to SQL Server data - because all Microsoft Office products support ODBC, it's easy to exchange data between Office on the client and SQL Server on Windows NT. And stored procedures in SQL Server provide a tool for developers to delegate query processing to the server, greatly increasing the speed of query execution. Microsoft SQL Server provides one of most effective relational database management systems available on the market for high-speed delivery of information to users.

MICROSOFT MAIL AND MICROSOFT EXCHANGE

As one of the market's leading electronic mail systems, Microsoft Mail provides an advanced interface for users to share data within your organization. Taking the fullest advantage of Microsoft Messaging Applications Programming Interface (MAPI), Microsoft Mail allows Microsoft Office users to access Mail services directly from within Office applications. Routing a Microsoft Excel spreadsheet or a Word document to other users within the organization is as easy as selecting a command from a menu. And MAPI support provides a powerful interface for developers as well. MAPI lets developers access mail services directly, programmatically routing documents through the system or even reading messages from the Mail inbox. Microsoft Mail provides a powerful platform for users to share ideas and collaborate on getting work done.

Microsoft Exchange, a next-generation client-server messaging system, will be available from Microsoft after the release of Windows 95. Microsoft Exchange Server provides advanced electronic mail, scheduling, groupware applications, and custom application development. Microsoft Exchange Server includes MAPI drivers that extend the capabilities of the Windows 95 Microsoft Exchange client. For example, when Microsoft Exchange is connected to an Exchange Server, you can access a replicated "public folder," create custom forms and shared documents, schedule meetings with others, manage time and tasks, and create custom electronic forms for use in business. Of particular interest to developers is the fact that the messaging functions of Microsoft Exchange can be accessed from within Office applications via OLE Automation.

MICROSOFT SYSTEMS MANAGEMENT SERVER

Microsoft Systems Management Server offers a powerful systems administration tool for hardware and software inventory management, network administration, and remote distribution and administration of client software. Updating users within your organization with new software no longer requires the laborious process of individual machine installations. Systems Management Server allows you to perform installation and configurations from Windows NT Server, saving you the time and hassle required for custom installations and eliminating the burden placed on users due to software versioning problems within your organization.

**MICROSOFT SNA
SERVER**

Microsoft SNA Server provides the gateway for accessing legacy data on IBM® mainframe and AS/400® computers. SNA Server allows you to preserve your investment in mainframe applications, giving you the tools to extract data from mainframe databases and applications to bring down to client machines via ODBC. SNA complements the BackOffice, allowing you to easily tie new solutions into existing systems.

Microsoft Solutions Provide a Competitive Advantage

Together, Microsoft Office and Microsoft BackOffice provide a powerful platform for developing custom solutions that automate processes within your organization. The rich component libraries, common programming language, and support for OLE provided by Office for Windows 95 form the foundation for developing solutions that take advantage of ODBC and MAPI in accessing the enterprise data management and messaging services of BackOffice. In short, solutions developed with Office and BackOffice allow users to access more meaningful information in less time, allowing them to make better decisions in the day-to-day operations of your organization. Organizations with systems that provide more effective delivery of information to decision-makers enjoy a competitive advantage in the marketplace. The more meaningful information you have at your disposal, the better decisions you'll make, and the better your organization will do in a competitive environment.

Earlier in this paper, we saw how the Chart House implemented a Microsoft Solution based on Office and BackOffice to automate the process of maintaining and retrieving information on customers. Additionally, through their Microsoft Solution, the Chart House was able to obtain meaningful information regarding their customers and effectively manage a customer service program for increasing dining frequency. Many other organizations have realized benefits from Microsoft Solutions developed with Office and BackOffice. Let's take a brief look:

**RHONE-POULENC
RORER**

Rhone-Poulenc Rorer (RPR), a major pharmaceutical firm, contracted Adaptive Strategies, a Microsoft Solution Provider partner, to implement a Microsoft Solution developed with Office and BackOffice to automate the dissemination of product and marketing information to the RPR sales force. With a server component employing Windows NT, SQL Server and Microsoft Mail, and a client component using Visual Basic, Word, Microsoft Excel and Schedule+, RPR sales representatives can dial in from remote locations to download current marketing and sales information from the server. Easy access to information helps the RPR field sales force keep up-to-date on new product offerings and easily access product information for prospective customers. The Adaptive Strategies system has resulted in a significant reduction in the sales cycle, allowing RPR to respond to requests for proposals in less time.

**UCLA MEDICAL
CENTER**

The UCLA Medical Center document management system based on Microsoft Word and Microsoft SQL Server allows medical center administrators to easily access, update and print patient records. The UCLA Microsoft Solution based on Office and BackOffice replaced a mainframe/dumb terminal system that provided a very limited interface in working with patient records. UCLA estimates that the greater flexibility and performance provided by their Microsoft Solution is saving them over \$150,000 a year in managing patient records.

BANKERS TRUST

In seeking a way to allow customers to easily access information regarding portfolio investments, Bankers Trust implemented a system in Microsoft Excel that gives users the data analysis tools to track their investments directly. This Bankers Trust Microsoft Solution has resulted in a higher level of customer satisfaction, allowing customers to gain access to information at any time, without having to go through a company representative.

**THE BANK OF
NEWPORT**

The Bank of Newport based in Newport, Rhode Island, is one of the oldest retail banks in the United States. Yet, they are keeping abreast of the rapid pace of technology advancements in banking systems. Recently, The Bank of Newport contracted Systeme Corporation, a Microsoft Solution Provider partner, to develop a new system for running their account management and teller operations. Using Microsoft Excel, Microsoft Access, Visual Basic, Word and PowerPoint, Systeme created a client-server system that provides tools for customer service representatives to easily open new accounts and retrieve information on existing accounts. The Bank of Newport Microsoft Solution also provides customer service representatives the tools for accessing information in selling new banking services to customers.

**DONALDSON, LUFKIN,
AND JENRETTE**

Donaldson, Lufkin, and Jenrette, a full-service investment banking firm, recently decided it needed a better way to present market research and investment recommendations to institutional investors. The main presentation tool for the company is a "pitchbook" that combines data from three Microsoft Office applications (Word, Microsoft Excel, and PowerPoint). The pitchbook is an effective way to deliver information, but Donaldson, Lufkin, and Jenrette felt they could gain even more of a competitive edge if they could reduce the time and effort it took to assemble and produce the presentation tool. With the help of MicroModeling, a Microsoft Solution Provider partner, Donaldson, Lufkin, and Jenrette is building an automated client presentation system based on Microsoft Office for Windows 95. The raw information is stored in a Microsoft Access database file, and includes Word documents, Microsoft Excel documents, and PowerPoint documents. The firm's analysts use a Microsoft Access control screen to decide what information to include in their report. Then the presentation builder application assembles it into a completed pitchbook by controlling PowerPoint from within Access via OLE Automation. Once this solution is in place it will reduce the time required to produce a pitchbook by 50 percent, allowing the firm's professionals to concentrate on analyzing the data rather than on the mechanics of assembling the presentation.

For More Information

For more information on Microsoft Solutions, call Microsoft Customer Service at 1-800-426-9400. For information on contacting a Microsoft Solution Provider to help develop a Microsoft Solution for your organization, contact the Microsoft Solution Provider program at 1-800-765-7768.

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