

Creating the Personnel Profile Information Application

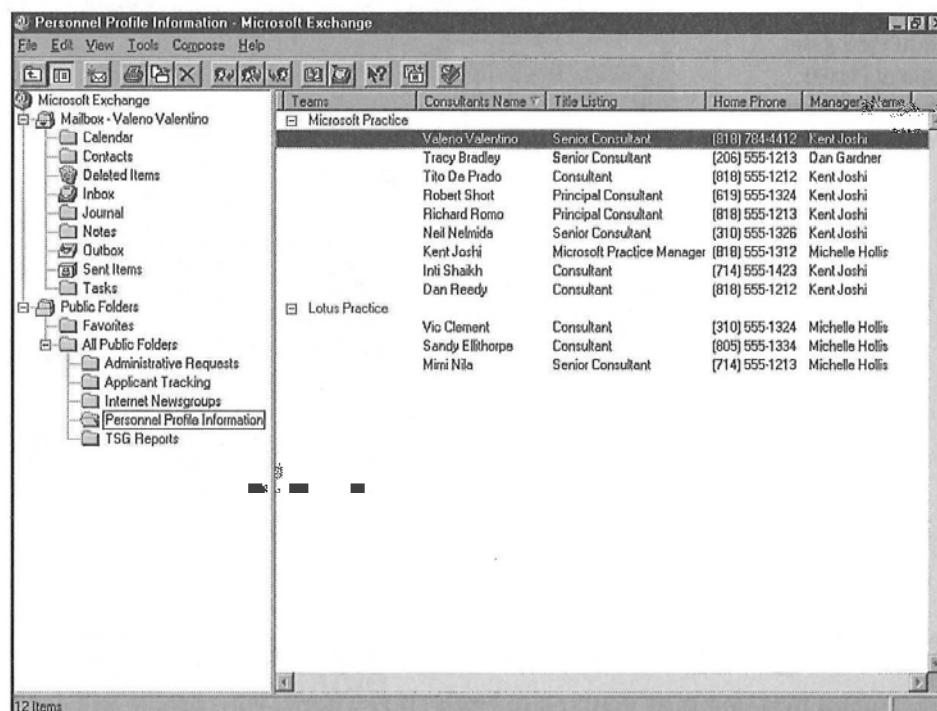
In the following pages you create an application using both Form Designer and Visual Basic's 16-bit version. This demonstrates a first look at extending your forms application with Visual Basic. Start the forms designer by clicking the Start button, Programs, and then the Microsoft Exchange Folder. Click the option for the Forms Designer to start it.

Creating the Personnel Information application may not cause your company's stock to rise, but it will teach you some useful tricks you can bring into the world of development using Microsoft Exchange's Development tools. In this section you take a look at using Send Forms in a folder, calling a hidden response form, using a rich edit field with the help of Visual Basic to enable file attachments in your form, and creating a custom response.

The Personnel Profile Information folder is a public folder that houses the forms you will create in this section. It also contains different views you will create and the result of the information collected by your Personnel Information Application. A sample view of items submitted to the Personnel Profile Information folder is shown in Figure 33.29.

FIG. 33.29

Sample View of the Personnel Profile Information folder.



The Personnel Profile Information Request form's compose window, as shown in Figure 33.30, is used by a Manager to send a Personnel Information Request item to the user's Inbox. Its Read window is used by the members of the organization to read the request and open the Personnel Profile Information Response form.

FIG. 33.30

Pre-addressing the
Response form

New Personal Profile Information Request - Microsoft Exchange

File Edit View Insert Format Tools Compose Help

To: Consultants

Subject: We need your personal information and profile

Administrator Instructions: To send a Personal Profile Information Request, click the To button and select the recipients for the request. To send the Request, click the Send button.

For filing purposes, we need your personal profile information. To fill out the Personal Profile Information Response form, please click the Open Personal Profile Information Response Form button below this text.

Open the Personal Profile Information Form

The Personnel Profile Information Response form's Compose window, as shown in Figure 33.31, is pre-addressed to the Personnel Profile Information folder. When the user clicks the Send button, the item is automatically routed to that folder. The Read Window displays the information in the Personnel Profile Information Response item that the user submits to the Personnel Profile Information folder.

FIG. 33.31

Pre-addressing the
Personnel Profile
Information Response
form.

Personal Profile Information Form

File Edit View Insert Format Tools Compose Help

To: Personal Profile Information

General Information Personal Profile Job History Training/Certification

Address: 777 Developer Way

City: Los Angeles State: CA

Home Phone: (818) 555-1214 Alt Phone: (310) 555-1442 Pager: (818) 555-4341

In case of emergency, contact:

Name: Lisa Valentino Home Phone: (818) 555-1214 Alt Phone: (310) 555-3413

Teams: Microsoft Practice Manager's Name: Kent Joshi

Creating the Personnel Profile Information Folder

You must log in as yourself to begin. If you don't, your profile will not reflect the location of your mailbox. Next, you need to create a public folder for storing the Personnel Information items. Where you create this folder is really up to you, but to make this application available

to everyone, you should use the All Public Folders folder as your starting point. To create the Personnel Information Folder, follow these steps:

1. In the set of public folders in the Microsoft Exchange Client, Select All Public Folders.
2. Choose New Folder from the File menu, and in the Folder Name box, type **Personnel Profile Information**.
3. Choose OK.

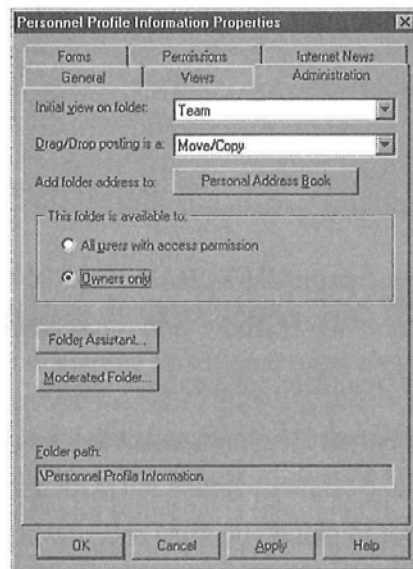
Restricting Folder Access

While you work on the folder, restrict access to the folder so that you can design it without being interrupted. To restrict access, follow these steps:

1. Select the Personnel Information folder and then choose Properties.
2. Select the Administration tab and then select the Owners Only option button, as shown in Figure 33.32.

FIG. 33.32

Using the Administration tab to select the Owners Only option.



Don't choose OK yet. You're not finished with the Administration tab (the steps are completed in the following section).

Making the Folder Address Available

For this application, you will create a pre-addressed Response form. It's a lot like a pre-addressed envelope that you receive in the mail. In this case, the Response Information form is pre-addressed so that posting to the folder is automatic. You now learn how to pre-address a folder. Before you can pre-address a form to a folder, the folder's address must be available to the address book.

To add a folder address to your Personal Address Book, do the following:

1. In the Administration tab, click the Personnel Address Book button to add the folder address to your Personnel Address Book. Although you won't get any confirmation, the address is added to your Personnel Address Book. If you look down at the bottom of the Administration tab, you will see a backslash and the name of your folder in the folder path area.
2. Choose OK to return to the Microsoft Exchange Client.

Creating the Personnel Profile Information Request Form

The Forms Designer provides several generic pre-designed templates for you to begin using immediately.

To get started with the Personnel Profile Information Request form, use the SNDR2WND.EFP template. This is a two-window Send form similar to the one you would use to send messages. It has To, From, and Subject fields, such as a standard mail message. Although you can use the Form Template Wizard to choose a template, it is faster to choose a template directly from the list of the File Directory dialog box.

Before you open any files, create an application directory to house your files for this application.

1. Change directories to the following path: C:\EXCHANGE\FDFORMS.
2. Create two subfolders. Call the first one PQINFO and the second PPINFO.

To open and use the SNDR2WND.EFP template, follow these steps:

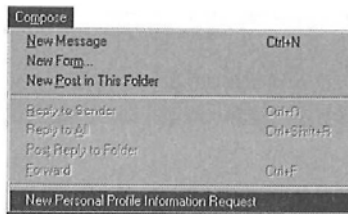
1. From the opening screen of the Forms Designer, select the *A Form Template*.
If you are already running Forms Designer, choose File, Open from the menu bar.
2. This is a read-only file, so in order to edit it you must save it with another name in the PQINFO subfolder. In the Exchange\Fdfforms\Template folder, select the SNDR2WND.EFP file.
3. Click File from the menu and choose Save As.
4. Navigate through the directory structure to C:\EXCHANGE\FDFORMS\PQINFO.
5. In the filename box type **pqinfo**.

Designing the Compose Window

Figure 33.33 displays how the form looks when it is selected from the Compose menu. To run the Personnel Profile Information Request Form, choose new Personnel Profile Information Request from the Compose menu.

FIG. 33.33

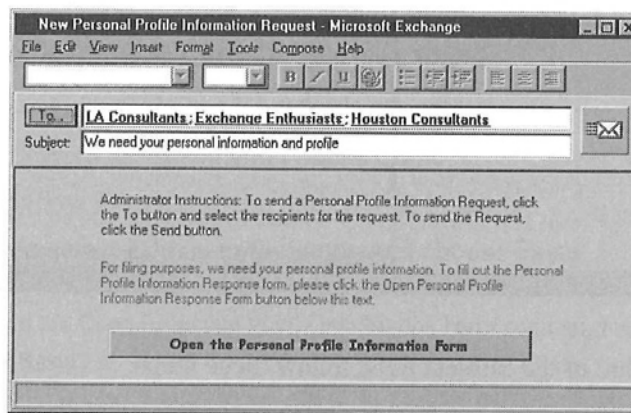
Displays how the form will look when it is selected from the Compose menu.



The Personnel Profile Information Request window, shown in Figure 33.34, is great for anyone who needs profile/personal information from a user or group of users in the company. You can use Figure 33.34 as a model to help customize this form.

FIG. 33.34

Shows you how the Personnel Profile Information Request form looks in its final state.



Setting the Window Properties for the Compose Window

When you start designing forms, you must always consider who will be using your form and how. On many occasions the Compose window is different from the Read window. You use the Personnel Profile Information form to request information in a Compose window. The end users see a form that looks similar to the one you sent, but they see only who sent the form to them and the date and time that it was sent. The Request form in the Read window should include brief instructions to inform the recipient how to fill out the form.

Designing the Read Window

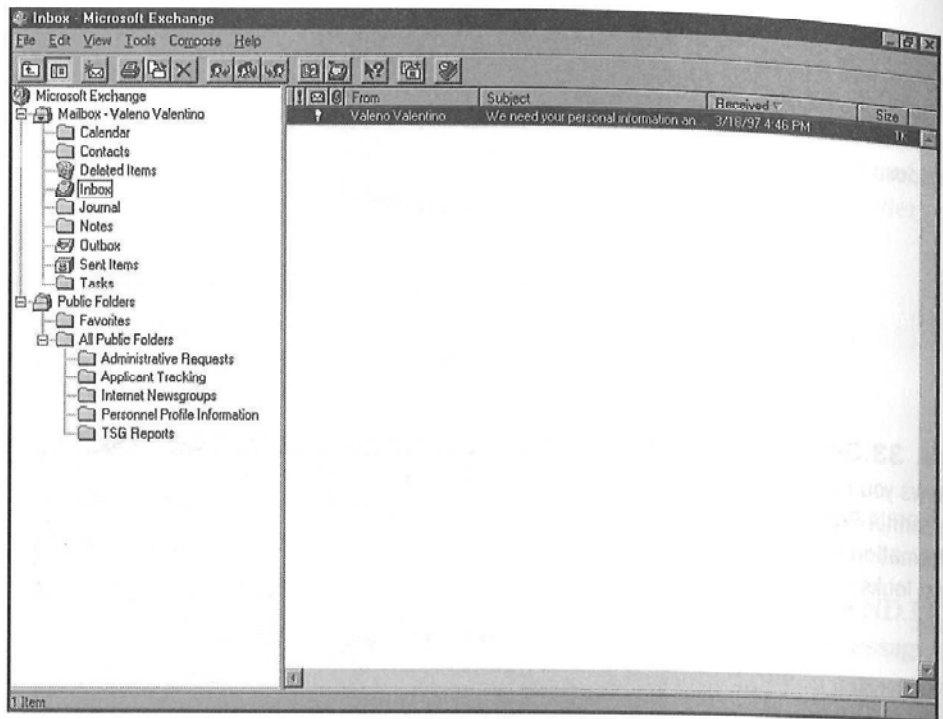
At run-time, the Read window of the form appears when the user double-clicks a Personnel Profile Information Request item in the user's Inbox. The Read window displays the Personnel Profile Information Request form and your instructions. Figure 33.35 shows you an example of what the user sees in his Inbox.

Setting the Initial Value for the Subject Field

As a courtesy to the user, you can set the initial value to display in the Subject field of the Read window.

FIG. 33.35

An example of what the user will see in his Inbox when the Personnel Profile Information Request item has been delivered to him.



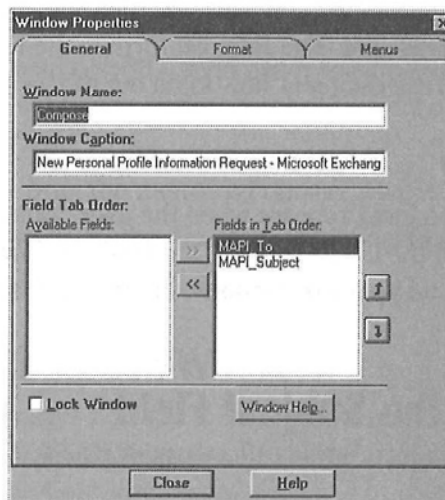
To set the initial value of the Subject field, follow these steps:

1. Double-click the Subject field to view field properties and then select the Initial value tab.
2. In the Subject box, type **We need your Personnel Profile Information**.
3. Choose close.

The title bar of the Form window can also be defined in the Window Properties dialog box. As a general rule, it should begin with New, followed by the name of the form (see Figure 33.36).

FIG. 33.36

Defining the title bar of the form.



To set the window caption, follow these steps:

1. Click View from the menu and select Window Properties.
2. In the General tab, change the Window caption to read "New Personnel Profile Information Request."
3. Click the Close button.

Copying User Instructions Label Field to the Compose Window

In general practice, I usually create the information for the Compose Window first, and then I copy that to the Read window. Refer to Figure 33.30 for an example of text to use as user and Administrator instructions.

To copy the user instructions, use the following steps:

1. Click the user instructions label field.
2. Select Edit from the menu and choose Copy.
3. Select Window from the menu and choose Read.
4. Once again select Edit from the menu and choose Paste.

NOTE You add the Open Personnel Profile Information Form command button later in Visual Basic. ■

After opening the Read window, remove the unnecessary fields from the form. You can do this by selecting them and pressing the Delete key on your keyboard.

To remove the To and Cc fields from the Read window, select each one and press the Delete key on your keyboard. Now you can paste and re-position the user label field.

Resizing the Read Window

The Read window re-sizes just as any other window—just be sure you leave enough room for the button made later in Visual Basic.

Setting the Window Properties for the Read Window

The window caption is the only property to set in the Window Properties dialog box. To set the window caption, follow these steps:

1. Select View from the menu and click Window Properties.
2. Click the General tab and then change the window caption to read Personnel Profile Information Request. Then choose Close.

Setting the Form Properties for the Read Window

In the General tab of the Form Properties dialog box, change the display name and the item type for the form. To set the forms general properties, follow these steps:

1. Select View from the menu and click Form Properties.
2. In the General tab, change the settings to reflect the settings in Table 33.3.

Table 33.3 Setting Form Properties

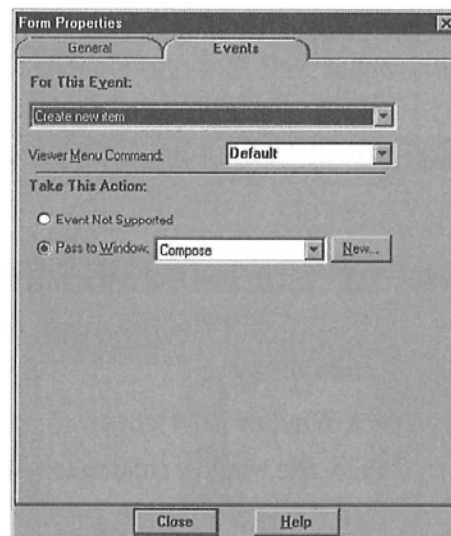
Property	Setting
Form Display Name	Personnel Profile Information Request
Version	1.00
Number	PINFO7.1
Item Type	IPM.PersonnelProfileInformationRequest
Description	Send requests for Personnel and profile information in your company

Selecting Events for the Request Form

The most common event is the Create New Item event. Select View from the menu and click Forms properties. Then click the Events tab—you should see something similar to Figure 33.37.

FIG. 33.37

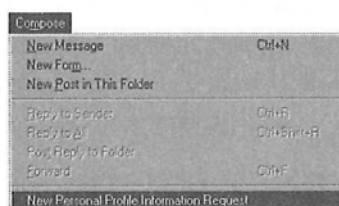
Viewing the Create New Item event.



Every time the New Personnel Profile Information Request is chosen from the menu, the Create New Item event executes. This event creates a new instance of The Personnel Profile Information Request form. In other words, the Compose version of the Request form appears when the New Personnel Profile Information Request is chosen from the Compose menu. Figure 33.38 illustrates a new instance of the Personnel Profile Information item.

FIG. 33.38

Viewing the new instance of the Personnel Profile Information Request item from the Compose menu.



Creating a Custom Response

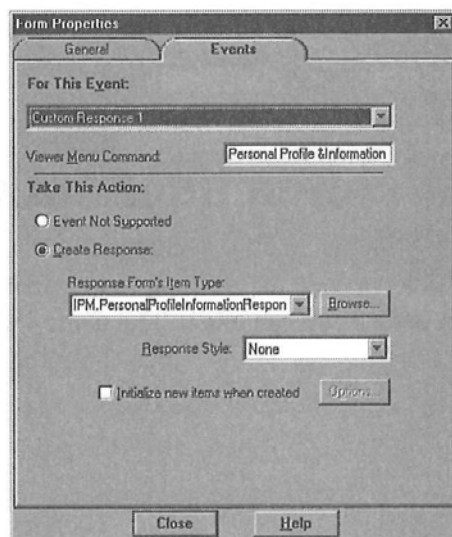
The first time people start working with custom responses, they ask themselves, "Why do I need two forms?" The Read version of the request form is a request from you to the end user for information you need from him/her. On this form is a button that enables the end user to open another form so they can enter the information you requested and return the form to the Personnel Profile folder for review.

You still must set up a Custom Response event to launch the Personnel Profile Information form. This creates a new Compose menu item each time it executes. To do this use the Forms Properties events tab as shown in Figure 33.39:

1. Open the Form Properties Events tab.
2. Choose Custom Response 1 in the For This Event field.
3. Select the Create Response radio button.
4. Browse to select the Response form (PQINFO.EFP). Accept the default Response Form Item Type.

FIG. 33.39

Viewing a Custom Response already created in the Forms Properties window.



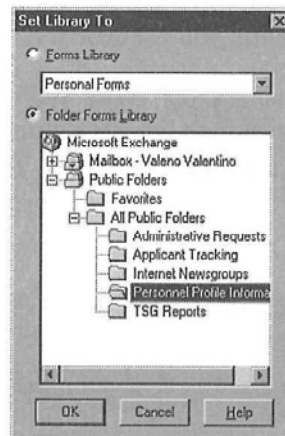
Saving and Installing the Form

The Forms Designer gives you a start in the design of forms, but the limited toolbox doesn't offer much depth. Most of the shortcomings of the Forms Designer can be easily overcome with Visual Basic or Visual C++. Before you can extend the functionality with Visual Basic, you must first install the form into the Personnel Profile Information folder. When you install this form, the Visual Basic code is created for it automatically; this means a Visual Basic Project file and a .CFG file are created. The .CFG file will be used later by Inbox to install the Visual Basic Executable so that the form with the new Visual Basic Code can run from the Inbox.

To install the Request Form, follow these steps:

1. Click the File menu and select install. If your file has not been saved before or changes are detected, the Forms Designer displays a message box informing you that changes to your form will be saved before continuing.
2. When the Folder Library appears, click Personnel Profile Information folder, as shown in Figure 33.40
3. Click OK.

FIG. 33.40
Installing the Request
form in the Personnel
Profile Information
folder.



NOTE Always save the files with a name that relates to the contents of the file and is easy to remember. ■

Creating the Personnel Profile Information Form

To get started with the Personnel Profile Information form, you can use the SNDR2WND.EFP template. This is a two-window send form used for creating response items. This file however is read-only, so you must rename it before you can use it. The name I will be using throughout this chapter is ppinfo.

To open and use the SNDR2WND.EFP template, follow these steps:

1. Select File from the menu and choose Open.
2. This is a read-only file, so in order to edit it you must save it with another name in the PPINFO subfolder. In the Exchange\Efdforms\Template folder, select the SNDR2WND.EFP file.
3. Click File from the menu and choose Save As.
4. Navigate through the directory structure to C:\EXCHANGE\EFDFORMS\PPINFO.
5. In the filename box type **ppinfo**.

To remove the cc and Subject fields, select them and press Delete.

From the toolbox, select the Tab control and click your form. Resize the Tab control to fill the contents panel. To fill the reference name fields, name the tabs by double clicking each one.

The names I have chosen are as follows:

Personnel Profile

Job History

Training/Certification

Adding Fields to the Compose Window of the Response Form

Using the Designer toolbox, place the following fields on each respective tab, as illustrated in Figures 33.41–33.44 (see Tables 33.4–33.7).

FIG. 33.41

The first tab and the fields it contains.

The screenshot shows a Microsoft Exchange window titled "Personal Profile Information Response - Microsoft Exchange". The window has a menu bar (File, Edit, View, Insert, Format, Tools, Compose, Help) and a toolbar. Below the toolbar is a "To:" field. The main content area is divided into four tabs: "General Information", "Personnel Profile", "Job History", and "Training/Certification". The "General Information" tab is selected and contains the following fields:

- Address: [text box]
- City: [text box] State: [text box]
- Home Phone: [text box] Alt Phone: [text box] Pager: [text box]
- In case of emergency, contact:
- Name: [text box] Home Phone: [text box] Alt Phone: [text box]
- Teams: [text box] [dropdown arrow] Manager's Name: [text box]

Table 33.4 Fields on the first tab

Type of Field	Caption	Reference Name	Column Name
Entry	Address:	Address	Address
Entry	City:	City	City
Entry	Home Phone:	HomePhone	HomePhone
Entry	Alt Phone:	AltPhone	AltPhone
Entry	Pager:	Pager	Pager
Entry	In case of emergency,contact:	Frame1	Frame1
Entry	Name: ContactName	Emergency	Emergency Contact Name
Entry	Home Phone: HomePhone	Emergency HomePhone	Emergency
Entry	Alt Phone: AltPhone	Emergency	Emergency AltPhone
ComboBox	Teams:	Teams	Teams
Entry	Manager's Name:	Manager's Name	Manager's Name

In addition to or instead of a user typing in a Personal Statement, she can attach relevant files.

To attach a file to the Personnel Profile Information form, select Insert from the Menu and click file. The file automatically finds the RichEntry field with the MAPI_Body_Custom type.

FIG. 33.42

The second tab and the fields it contains.

The screenshot shows a Microsoft Exchange window titled 'Personal Profile Information Response - Microsoft Exchange'. The 'Personnel Profile' tab is selected. The form contains the following fields:

- Consultants Name:** A text entry field.
- Title:** A text entry field with a dropdown arrow.
- Personal Statement:** A large text area for a rich text entry.
- Attachments:** A separate text area for listing attachments.

Table 33.5 Fields on the second tab

Type of Field	Caption	Reference Name	Column Name
Entry	Consultant's Name:	Consultants Name	Consultants Name
ComboBox	Title:	Title Listing	Title
Entry	Personnel Statement	Personnel Statement	Personnel Statement
RichEntry	Attachments:	Attachments	Attachments

FIG. 33.43

The third tab and the fields it contains.

The screenshot shows the same Microsoft Exchange window, but with the 'Job History' tab selected. The form contains the following field:

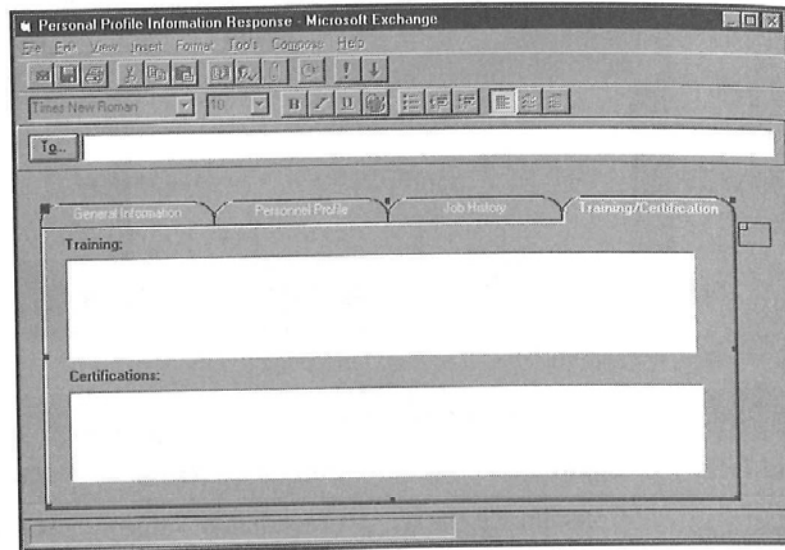
- Job History:** A large text area for a rich text entry.

Table 33.6 Fields on the third tab

Type of Field	Caption	Reference Name	Column Name
RichEntry	Job History:	Job History	Job History

FIG. 33.44

The fourth tab and the fields it contains.

**Table 33.7** Fields on the fourth tab

Type of Field	Caption	Reference Name	Column Name
RichEntry	Training:	Training	Training
RichEntry	Certifications:	Certifications	Certifications

Setting the Initial Value of the Teams Field

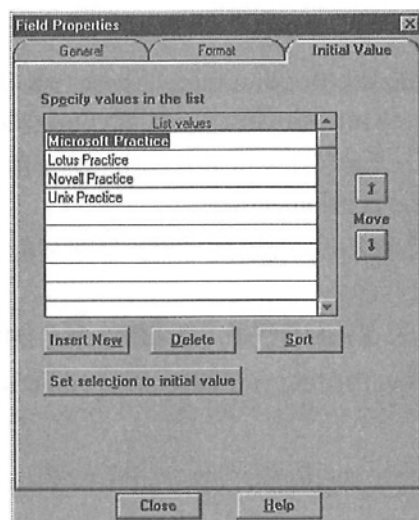
The initial value properties define the values that appear in a field at run-time. In this case, define the initial values for the Team ComboBox on the first tab. You can also choose a default value to appear at run-time.

To set the initial value for the ComboBox field, follow these steps:

1. Double-click the Teams ComboBox and select the initial value tab.
2. Type the values that appear in Figure 33.45.
3. Select the field you want to be the default value and click the Set selection to initial value button.

FIG. 33.45

Setting the initial values
for the ComboBox field



Pre-addressing the Response Form

As stated earlier, a pre-addressed form is like an envelope with a return address. You pre-address this form by setting the initial value of the To field to the Personnel Profile Information folder.

To predate the form, follow these steps:

1. Double-click the To field.
2. In the Initial Value tab, choose To and then choose Personnel Address Book from the Show Names From The: drop-down box.
3. Select the Personnel Profile Information folder. Choose To and then choose OK.
4. Choose Close to return to the Forms Designer.

Setting the Window Properties for the Response Compose Window

Now set the window caption and the field tab order. The window caption appears in the title bar of the window. The field tab order is a property that controls the order in which the windows fields gain focus as the user presses the Tab key.

To set the Window Caption, complete the following steps:

1. From the View menu, click Window Properties.
2. In the Window Caption box in the General tab, change the current caption to Personnel Profile Information Response.

To set the tab order, complete the following steps:

1. Select the field in the Available fields box, and then choose the Add arrow button or double-click the field to add the field to the Fields In Tab Order box.
Leave MAPI-To as the first tab in the Fields In Tab Order box. Add the rest of the fields in the order they are listed in the previous table.
2. Choose Close.

Copying Fields in the Compose Window to the Read Window

You can save design time by copying everything you have done so far in the Compose Window to the Read Window.

To copy fields in the Compose window to the Read window, follow these steps:

1. Select the Tab Control by clicking in an empty space anywhere on the Tab Control.
2. Choose Copy from the toolbar.
3. From the Window Menu select Read, and then choose Paste from the toolbar.

Setting Window Properties for the Response Read Window

In the Window Properties dialog box, repeat the same procedures as were performed in the Compose Window to set the tab order and window caption name properties.

NOTE Leave the pre-assigned MAPI fields set, and then order your fields in the same order of the Compose Window. ■

Setting Form Properties for the Response Read Window

Now you can name the form and give it a unique item type that matches the item type you specified for the Custom Response 1 event in the Request form.

To set the form display name, follow these steps:

1. On the Main window toolbar, click the Form Properties button.
2. In the Form Display Name box inside the General tab, type **Personnel Profile Information Response**.

To set the version, number and item type, follow these steps:

1. In the Version box, change the number to 1.00.
2. In the Number box, type **PINFO7.2**.
3. In the Item Type box, change the item type to **IPM.PersonnelProfileInformationResponse**.

To set the form description, follow these steps:

1. In the Description box, type **Use this form to fill out and send Personnel profile and emergency information to the Personnel Profile Information folder.**
2. Choose Close.

Saving and Installing the Response Form

As stated earlier, when you choose install from the File menu in Forms Designer, the Forms Designer tells you it will save the form before it installs it (unless it is already saved). After a moment, the Folder Library appears. This enables you to save your form in a particular folder (such as the Personnel Profile Information folder).

NOTE Always save the files with a name that is logical, descriptive, and easy to remember. ■

Creating the By Team View

The By Team view indicates which practice(s) the consultant is a member of.

The By Team view consists of the following fields: Teams, Consultant's Name, Title Listing, Home Phone, and Manager's Name. The view groups these fields by team and sorts items in ascending order by Consultant's Name.

To create the By Team View, follow these steps:

1. In the Exchange Client, select the properties for the Personnel Profile Information folder.
2. Find the Views tab and choose New.
3. Be sure to Remove any fields from the Show the following columns box, so that it is empty when you start to add fields.
4. In the Available Columns box, select Teams and Consultant's Name and then double-click them separately.
5. Set the column width of the fields as follows:
Teams 36
Consultant's Name 36
6. Choose OK.
7. In the Group Items By drop-down box, select teams, choose OK, and then choose OK again.

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Setting Permissions

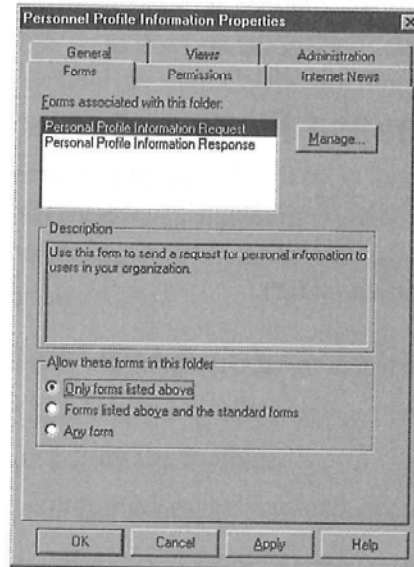
In the Permissions tab, you define different levels of security for your folder.

To set permissions, select the Permissions tab in the Personnel Profile Information Properties dialog box. Then set permissions according to the following table.

Sometimes you might want to restrict users to only the items you want them to interact with. Figure 33.46 shows how to limit the forms a folder displays.

FIG. 33.46

Limiting the forms a folder displays.



To restrict the types of items, follow these steps:

1. Select the Personnel Profile Information folder and then choose Properties from the File menu.
2. In the Properties dialog box, select the Forms tab.
3. Select the Only Forms Listed Above option button, and then choose OK.

Testing the Application

The time has come to test the application. Once you are satisfied that it's working correctly, you can enhance its usability by giving it some extended capabilities in Visual Basic.

To test the Request form in the Personnel Profile Information folder, follow these steps:

1. Select the Personnel Profile Information folder.
2. From the Compose menu, choose New Personnel Profile Information Request. The Request form's Compose window appears.
3. In the To box, type your name and then press Ctrl+K to resolve the address. Then click the Send Button.
4. Select the Inbox and double-click your new mail. The form will install (if it hasn't been installed on your computer before) and display the read version of the Request form.

To test the Response form, follow these steps:

1. Select the Personnel Profile Information folder.

2. From the Compose menu, choose New Personnel Profile Information Response. The Response form appears.
3. Fill out the appropriate information. Then click the Post button located at the top right of the Response form. This action will post the form to the Personnel Profile Information folder.
4. Select the Personnel Profile Information folder and then make sure the view is set to teams. Click the plus symbol next to the appropriate team and then double-click the consultant's name. This action displays the form with the information you requested. Tab through it and make sure it is correct. Because it is posted in the Personnel Profile Information folder, the information can always be changed.

Adding a Button to the Form with Visual Basic

To modify a form generated using the Forms Designer, you must use the Visual Basic that comes with the Microsoft Exchange Client or the 16-bit compiler of Visual Basic version 4.0 or later.

To add a command button to the Compose Window, follow these steps:

1. In Visual Basic, choose Open Project from the File menu.
2. Select the pqinfo.vbp file, which is located in the directory path you created earlier in this chapter to house all project files for this application.
3. The directory name will be **PQINFO.vb**. Here is an example:
C:\EXCHANGE\FDFORMS\PQINFO.VB\pqinfo.vbp.
4. After the project has been loaded, double-click the COMPOSE.FRM from the Project window.

To add the Command button to the form, follow these steps:

1. If the toolbox is not visible, select toolbox from the View menu.
2. Click the Command button and then add it to the Compose form.
3. While the Command Button is still selected, press the F4 key on your keyboard. This opens the Properties dialog box. Set the Command button's Caption property to Open & Personnel Profile Information Response Form. Then set the Enabled property to False.

Cleaning up the Form Window

When the Forms Designer generates Visual Basic code for the form, it seems to scramble the components in the Compose and Read windows. Fortunately, the generated code contains several procedures that arrange these components in the window at run-time. To clean up the window, the first thing you should do is enlarge the window. Then hide the scroll bars by dragging them to the edges of the window. Next hide the status bar by setting the Align property for the Status Bar Control to 0 -None. Now drag the status bar out of your work area as you did the scroll bars.

Increasing the Canvas Size

The Form window canvas consists of a large picture control (Canvas_Ctrl) inside a much smaller canvas control (CanvasParent). To resize the canvas, follow these steps:

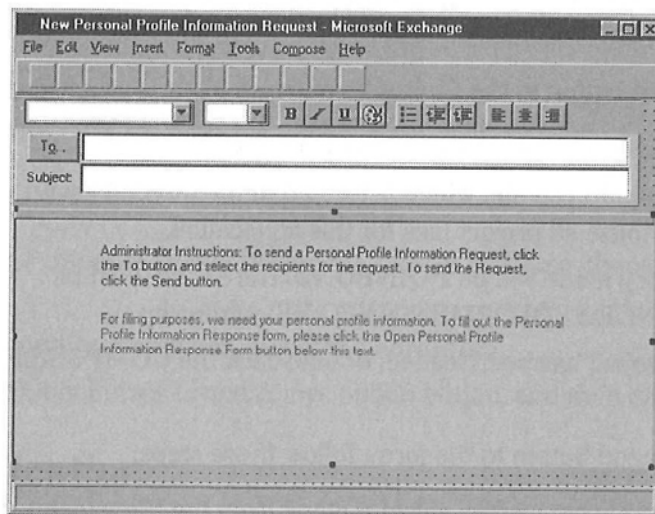
1. Before you can select the CanvasParent control to resize it, you must first reposition the Canvas Ctrl inside the CanvasParent, as shown in Figure 33.47.

FIG. 33.47
Increasing the size of
the Canvas Ctrl.



2. Select the CanvasParent control, and then resize it until it looks like Figure 33.48

FIG. 33.48
Visual representation of
how the CanvasParent
control should look after
resizing.



Adding Code to the Command Button

To add code to the Command button, double-click the Command button, and add the code as shown to the button-click procedure.

```
***begin code listing
Private Sub Command1_Click()
    Call menComposeCustomResponse_Click(0)
End Sub
```

This code calls the Click procedure for the Custom Response command and passes it an Index value of 0. This is the same value that the Custom Response menu command passes to the procedure. In the number system, when you count from 0 to 9, you have actually counted 10 numbers. The zero you passed in the menComposeCustomResponse Sub procedure represents the Custom Response 1 event you set up in the Forms Designer earlier in this chapter. If we were to pass a 1 to this procedure, this would represent the Custom Response 2 event.