

# Formulize 3.1 Final



## Readme

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## Installation

### Fresh Install

1. Install XOOPS or ImpressCMS on your website if you haven't already.
2. Extract the module files and upload them to the /modules/ folder on your server.
3. Change the permission on the /export/ folder in the Formulize module so that it is writable (777 in Unix/Linux).
4. Install the core patch that is used by Formulize. Extract the files in the patch to the same relative folder locations on your website. The patch has one file for the /include/ folder and one file for the /class/xoopsform/ folder.

**Note:** You don't have to install the patch (Formulize will work without it) but it is recommended that you do install it since it improves the behaviour of datebox elements a lot. If you do install it, then you will have to add one Smarty tag to the main theme.html file for your site. Add `<{$calendarjs}>` to the `<head> </head>` section of the theme.html file. Just after the `<title> </title>` tags is the recommended spot. You should clear your templates\_c folder after doing this.

For more details on the core patch, check out this Sourceforge tracker item:

[http://sourceforge.net/tracker/index.php?func=detail&aid=1077123&group\\_id=41586&atid=430842](http://sourceforge.net/tracker/index.php?func=detail&aid=1077123&group_id=41586&atid=430842)

5. Install the module like normal from System Admin—Modules in the administration side of your site.
6. Set the module preferences, particularly the number formatting options if you are not in North America.

# Upgrade Install

***If you are upgrading from version 1.6RC or earlier, do not follow the instructions below. Please contact Freeform Solutions for assistance. You can do so at: [formulize@freeformsolutions.ca](mailto:formulize@freeformsolutions.ca)***

***If you are upgrading from version 2.x, do this:***

1. Extract the module files and upload them to your server. Overwrite the existing files.
2. Make sure the permission on the export folder in the Formulize module is writable (777 in Unix/Linux).
3. In System Admin—Modules, update the Formulize module.
4. **BACKUP YOUR DATABASE.** Make sure you have a backup of your database, or at least your Formulize tables, before continuing.

In System Admin—Formulize, ie: the main admin page of Formulize, change the URL to this:

<http://www.yoursite.com/modules/formulize/admin/formindex.php?op=patch31>

A button will appear at the very bottom of the screen. Click it to update the module's database structure.

5. **If you are upgrading from version 2.1 or earlier**, then change the URL to this:

<http://www.yoursite.com/modules/formulize/admin/formindex.php?op=patch22convertdata>

A button will appear at the very bottom of the screen. Click it to sanitize your data and convert it to the new storage format used since version 2.2. **Do not run this patch twice!**

6. Run the upgrade patch for the new data structure in Formulize 3.0: change the URL to this:

<http://www.yoursite.com/modules/formulize/admin/formindex.php?op=patch30datastructure>

7. Set the module preferences, particularly the number formatting options if you are not in North America.

***If you are upgrading from Formulize 3.0, do this:***

1. Extract the module files and upload them to your server. Overwrite the existing files.
2. Make sure the permission on the export folder in the Formulize module is writable (777 in Unix/Linux).
3. In System Admin—Modules, update the Formulize module.

4. **BACKUP YOUR DATABASE.** Make sure you have a backup of your database, or at least your Formulize tables, before continuing.

In System Admin—Formulize, ie: the main admin page of Formulize, change the URL to this:

<http://www.yoursite.com/modules/formulize/admin/formindex.php?op=patch31>

A button will appear at the very bottom of the screen. Click it to update the module's database structure.

5. Set the module preferences, particularly the number formatting options if you are not in North America.

## **How can you help? How can you get help?**

Freeform Solutions is actively developing Formulize, with support from the community. You can post issues, questions, feedback, problems, etc on support forums at <http://www.freeformsolutions.ca/formulize>. We will attempt to respond to all postings as soon as possible. Further documentation is available at that website.

**Check the Getting Started Guide for more detailed information, including Troubleshooting Tips.**