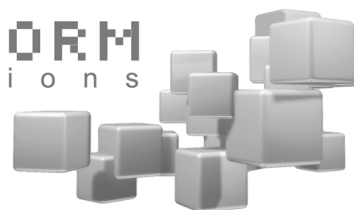


Formulize 2.2 RC1

FREEFORM
s o l u t i o n s



Readme

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Overview

Formulize is a module for XOOPS which lets you create forms in your website, users can fill them in, and you can then view, search, sort and analyze the data afterwards. There is also a report writing feature which lets you save “views” of the data for future reference, or even publish views to other users in your site.

Formulize includes several functions that can be included from outside the module. So if you are a developer or webmaster, and you want to create a form-driven, custom application in your XOOPS website, this “API” lets you rapidly create an application on top of a standard Formulize form. For more information about this, please see the PDF called *Using Formulize and Pageworks to Make Custom Applications* available from:

<http://www.freeformsolutions.ca/formulize>

Essentially, if there is no existing module to solve your problem, and your problem can be boiled down to a data input/data output description, then you can probably create an application with Formulize that will meet your needs more than adequately. To do this kind of advanced work, you may want to use the companion Pageworks module as well.

This release includes one patch to the XOOPS core. 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

Formulize has been tested with versions of XOOPS up to 2.0.13. Formulize does not necessarily work with the version 2.2 branch of XOOPS. It should work with 2.0.15 but has not been tested by us in that version. Make sure you get the form.php patch for 2.0.15 from the Download XOOPS page on XOOPS.org.

Installation

Fresh Install

1. Extract the module files and upload them to your server.
2. Change the permission on the export folder in the Formulize module so that it is writable (777 in Unix/Linux).
3. Install the core patch that is used by Formulize. Extract the files in the patch to the same relative folder locations on your XOOPS site. 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.

4. Install the module like normal from System Admin—Modules in the administration side of your XOOPS site.

Upgrade Install

If you are upgrading from version 1.6RC, do not follow the instructions below. Please contact Freeform Solutions for assistance. You can do so at: <http://www.freeformsolutions.ca/formulize>

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.** Formulize 2.2 makes several extensive changes to its database tables in the following steps. Make sure you have a backup of your database, or at least your Formulize tables, before continuing.
5. 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=patch22>

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

6. Once the first patch has completed, 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 in 2.2. **Do not run this patch twice!**

Configuring Formulize and Accessing Forms

Formulize 2.2 does not require much configuration. In the System Admin—Groups area, you should make sure that all groups that need to access forms have Module Access permission for Formulize.

Formulize also has some preferences that you can use to control the default settings for various form elements.

If you are using the Main Menu, then a link will appear there and it should provide a list of "General Forms" that includes all the forms you have created in your site.

You can customize this list (hide certain forms from it) using the "Modify entries in the Form Menu block" link in the admin side of the module. You can also create other categories of forms besides the default "General Forms".

To access this other categories, you need to use the Form Menu block. The Form Menu block is configured like any other block (control its appearance through System Admin—Blocks, and control who has access to it through System Admin—Groups). The Form Menu block will provide a link to each category and will list each form in the category as a sub entry in the menu.

Creating a Form

The most basic thing you can do is create a form. You can do this easily by going to the Administration Menu, then clicking the Formulize icon, and then clicking the icon beside where it says "Create a Form."

At that point, you will be asked for the name of the form and also how many entries people are allowed to make in it.

Next, specify the elements that you want in the form, such as text boxes, radio buttons, dropdown lists, etc. There are a lot of configuration options for each element. Most of them are explained with extensive descriptive text on the left side of the administration screens. Read it carefully to learn about all the options.

Lastly, you must specify the permissions for the form so that people can access it. On the front of the Formulize admin area, click on the icon beside where it says “Modify Form Access Permissions.” Then you can specify the group or groups you want to modify permissions for, and the form or forms you want to modify permissions for. Click the button at the bottom and then specify the permissions for each group and form. If you are using Firefox, you can hover your mouse over a permission to get a tooltip popup explaining what it is for.

Your form is now ready for use. Simply go to the front page of the site and click on the form in the Form Menu, or wherever else you have setup navigation to your forms.

Other Ways of Accessing Forms

You can access forms via the URL simply by adding a "fid" parameter to the end of the URL and including a valid form ID. You can learn the form ID numbers by looking at the URLs in the admin side of Formulize, and checking the value of the "title" parameter there (yes, it should be called fid too, sorry about that). ie, this URL will access form 5:

<http://www.yoursite.com/modules/formulize/index.php?fid=5>

You can access specific entries in a form by adding a "ve" parameter to the end of the URL. You can learn the correct value for the "ve" parameter by looking in the standard List of Entries page for a form, and hovering the mouse over the page and magnifying glass icon. The status bar of your web browser will show a URL for the entry, including a "ve" parameter. Use that number to access that entry directly. ie, this URL will access entry number 99 from form 5:

<http://www.yoursite.com/modules/formulize/index.php?fid=5&ve=99>

If you create frameworks of forms (see the *Using Formulize and Pageworks to Make Custom Applications* PDF for more details), then you can access a framework through the URL, by adding a "frid" parameter and including the ID number of the framework. You can learn the ID number of the framework by modifying the framework in the admin side of Formulize, and looking in the URL for the "cf" parameter. That is the ID number to use. ie, this URL will show framework 2 with form number 5 as the primary form:

<http://www.yoursite.com/modules/formulize/index.php?fid=5&frid=2>

New Features in 2.2

Version 2.2 of Formulize introduces over 60 changes, improvements and bug fixes, including over 30 new features. Several major new features that are worth highlighting:

Notifications

Added a full set of notification options, richer than XOOPS default notification options. In addition to the basics, you can set specific conditions on what form entries you want to be notified about (ie: only where "Type of Order = air mail"), you can set notifications to be delivered to all users in other groups, you can set notifications to be delivered to the user who just created/updated/deleted the entry, and you can specify a custom message template to be used if you want something different from the standard messages

Full Import Capabilities

Vastly improved import feature that supports updating existing entries as well as adding new entries. Validation of options fixed and improved. Multilingual sites supported. It also supports batch account creation if you import entries into a designated user profile form and you're using the registration codes module. Detailed instructions are on the import popup screen; read them carefully. Will not work on a framework; forms only.

"Other" Textbox Option For Checkboxes And Radio Buttons

Added an "Other" option to radio buttons and checkboxes so that a final option with a textbox beside it can be added to such a question

Real Default Page And New Url Options

Formulize can work with the Main Menu now, since if no form is specified in the URL, then the list of forms in the "General Forms" category is displayed instead. Plus, you can navigate directly to an entry in a form with an URL like this:

<http://www.yoursite.com/modules/formulize/index.php?fid=3&ve=46> OR, navigate directly to a framework with an URL like this:

<http://www.yoursite.com/modules/formulize/index.php?frid=6&fid=11>

Multi-Page Forms With Skip Logic

Added a multi-page form function (displayFormPages) which can be used to display a long form as a series of pages. Supports "skip-logic" so you can have certain pages display or not display based on the answers to previous questions.

Clone Entries

Added a "Clone Entries" feature so you can quickly make multiple copies of one or more entries in a form. Works with frameworks too, and intelligently duplicates entries in subforms

Dynamic Defaults

Added a dynamic default option for textboxes, which lets you specify default values using PHP code

Private Elements

Added a "private" option for all elements, which lets you mark a question as private and only users with special permission can view other people's answers to those questions. Useful if not everyone who has access to the entries in a form is supposed to see every single question. Also very useful in conjunction with the Registration Codes module to create highly customized profile forms.

Automatic Selectboxes With Usernames In Them

Added an option for selectboxes to populate them based on the usernames or full names of users in one or more groups

Frameworks Based On Common Values In Any Two Fields

Added the ability to relate forms in a framework simply on the basis of having a common value in any field. This is very powerful in conjunction with the new "dynamic default" capability in textboxes, and the newly functional "display as hidden" option. You can essentially embed PHP code within a form to set a customized tag for the entry at the time the user creates it, without the user seeing this or having the ability to alter the text accidentally (or maliciously). Proper setting of such tags on different forms, plus use of this common value feature in a framework gives application designers much more flexibility over how they arrange their forms and interfaces.

New And Improved Subform Ui

Completely reworked the "subform" UI, the interface users get when filling in a form that has a "unified display" form attached to it in a framework. You can specify where in the form the new subform UI should appear. The new UI lets users add entries in the subform, without leaving the main form. It also lets them modify certain elements in all the entries in the subform, without leaving the main form. The result is many fewer clicks and more visibility of the data in the subform.

More Information and Support

Formulize is known for certain to be fully compatible with versions of XOOPS up to 2.0.13. There are known issues with the 2.2 branch. We have not tested in XOOPS 2.0.15. If you are using 2.0.15 make sure you get the form.php patch that is available on the Download XOOPS page of XOOPS.org.

To learn more about all the features in Formulize, you should read through the changelog.txt file which contains brief descriptions of all the features and changes over the last 15 months.

Freeform Solutions is actively developing Formulize, with support from the community. You can post issues, questions, feedback, problems, etc on the dev.xoops.org website in the Formulize area. We will attempt to respond to all postings as soon as possible.

Further documentation about these modules will be released on dev.xoops.org as it becomes available. There is currently a white paper called *How to Manage Business Processes Using the Internet* which gives a high level overview of how Formulize and Pageworks can be used together to create any kind of data entry application you need inside a XOOPS-based website. There is also an “API” document called *Using Formulize and Pageworks to Make Custom Applications* that gives lots of examples and details of the various functions that you can use within Pageworks to access forms and data. It also contains useful information about frameworks of forms.