

# Formulize 2.1 RC1

## Readme

*By Freeform Solutions*

May 28, 2006



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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 two patches to the XOOPS core. For more details on the core patches, check out these Sourceforge tracker items:

[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)  
[http://sourceforge.net/tracker/index.php?func=detail&aid=1240507&group\\_id=41586&atid=430840](http://sourceforge.net/tracker/index.php?func=detail&aid=1240507&group_id=41586&atid=430840)

***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.***

# 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 two core patches that are used by Formulize. Extract the files in the patches to the same relative folder locations on your XOOPS site. The datebox patch has one file for the /include/ folder and one file for the /class/xoopsform/ folder. The selectbox patch has one file for the /class/xoopsform/ folder.

**Note:** Formulize will not work correctly without the selectbox patch applied. You don't have to install the datebox patch (Formulize will work without it) but it is recommended that you do install it. 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. In the System Admin—Modules area of your XOOPS website, find the modules that you uploaded and install them. Set the order of Formulize to 0 in order to hide it from the main menu. You will need to configure Formulize's Form Menu block in order to access forms.

***Formulize does not work with the XOOPS main menu. You must set the order of Formulize to 0 under System Admin—Modules (to hide it from the main menu). Use the Form Menu block to provide access to Formulize, or use a custom menu module such as iMenu to provide direct access to particular forms and other pages.***

## 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 2.0.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. 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=patch21>

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

## Configuring Formulize

***Formulize does not work with the XOOPS main menu. You must set the order of Formulize to 0 under System Admin—Modules (to hide it from the main menu).***

Instead of the main menu, Formulize makes use of its own Form Menu block. Make sure you have the Form Menu block setup for all groups that need access to forms. We strongly recommend that you make the Form Menu visible on all pages.

In the System Admin—Groups area, you should make sure that all groups which need to work with 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.

## 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.

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.

## More Information and Support

***The modules in this package work with versions of XOOPS up to 2.0.13.***

***There are known issues with the 2.2 branch.***

Freeform Solutions is actively developing Formulize, with support from the community. You can post issues, questions, feedback, problems, etc on the [dev.xoops.org](http://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](http://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.