

Formulize 2.3 RC1



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 also has a "screen" system that lets you customize the appearance of the module, to suit whatever applications you are trying to build. Read the section below on changing the "list of entries" screen to get started.

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, and the screen system is now enough for you, then 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.

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 2.0.16.
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 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 or earlier, 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.** 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=patch23>

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

6. **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!**

Configuring Formulize and Accessing Forms

Formulize 2.3 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.

Why do I see a list of entries instead of my form?

Why do I see my form instead of a list of entries?

It all depends on the permissions you have on the form, and how many entries the form is configured to allow.

For instance, if you make a form that is set up to allow more than one entry per user, then when you go to that form, the default screen that you see will be a list of entries in the form.

If you make a form that is setup to allow only one entry per user, then when most people go to that form, they will see the form itself and not a list. However if someone has `view_groupscope` or `view_globalscope` permission on the form, that will allow them to see multiple entries not just their own. In those cases, people will see the list of entries by default instead. The webmaster account has all permissions, so it should always see a list of entries by default, no matter what.

The "list of entries" screen is too much like a database backend. How do I change it?

As of Formulize 2.3, you can control the appearance and behaviour of the "list of entries" screen through the new "Defined Screens for this Form" feature. To use this feature, go to the administration side of Formulize, and click on the Settings icon beside your form. That's the icon with the letter and @ symbol on it.

At the bottom of this page, you can add a new screen for this form. A screen is simply a series of options that control how you want the form to appear. You can have multiple screens for any form.

There are two kinds of screens currently available: multi-page versions of forms, which are a useful way of presenting really long forms, and list of entries screens, which are customized versions of the default list of entries screen.

Add a new list of entries screen, and try changing the number of entries shown on each page. Try changing the text for certain buttons, or removing the buttons altogether by leaving the text blank.

Save your screen, and then note its SID number. With that, you can access your screen by going to this URL:

<http://www.yoursite.com/modules/formulize/index.php?sid=1>

You can go back and make more changes to the screen and they will be reflected at that URL, after you have saved the changes.

You can completely alter the appearance of the screen by using the custom template options near the bottom of the screen admin interface. You can customize where you want buttons and search boxes to appear, by using the variables listed and using PHP code to print them out wherever you wish on the screen.

You can even customize the appearance of each row in the list, so that it doesn't look like a table at all. Use the "display" function to print out specific values from each entry in each row. For more information on the display function, consult the *Using Formulize and Pageworks to Make Custom Applications* PDF.

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>

More Information and Support

Formulize is known for certain to be fully compatible with versions of XOOPS up to 2.0.16. There are known issues with the 2.2 branch.

MySQL 5

If you are using MySQL 5, you need to run in "traditional" mode. To set this mode, run the following SQL statement once:

```
SET @@global.sql_mode= '' ;
```

What's new?

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 2 years. **The last two releases have a lot of significant new features in them.**

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 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.