C:\Users\Owner\Desktop\logo.png

**Formulize Integration (Is this a good name for the extension? Would you prefer something else?)**

**User Guide**

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**Section 1: Description of the Extension**

(Also be the short description to post on the JED)

The aim of the Formulize Integration Extension is the integration of Formulize into Joomla. Formulize is a web application for data management that allows webmasters to quickly create forms and reports on the web. With both Formulize and Joomla installed on the same server, a webmaster can create forms in Formulize and embed those forms into a Joomla website using a simple interface. In order to display a particular Formulize form on a Joomla website, a webmaster create a new page by choosing a new menu item of type Formulize, and from the menu item's setting, simply select the desired form from a drop down list of all available Formulize forms.

A powerful feature of the Formulize Integration Extension is the user management synchronization between the two systems. It is possible to have Formulize replicate the entire set of users and user groups that is present in Joomla. This synchronization is done by first performing an initial synchronization by transferring all existing user data and user group data from Joomla to Formulize. After this operation, every action that is performed on users and user groups in Joomla is automatically performed in Formulize, keeping the two systems in sync at all time. That way, users can interact with the forms the same way as they would do through Formulize, having access to all the tools available in Formulize itself. The administration of the forms only is performed from within the Formulize system, by the webmaster.

Note that this synchronization is one way only. This means that all actions performed on users and user groups in Formulize are not be replicated in Joomla. The implication of this is that the Formulize system can be used for other activities, those activities being totally independent of Joomla. That way, the management of forms involving other users and user groups can still be conducted in Formulize without interfering with the two system's synchronization. Also, note that this synchronization is optional. It is possible for a webmaster to embed only forms that are public and have the two systems managing their users and user groups completely independently from each other.

The Formulize Integration Extension is made of two parts, a component and a plugin. Those two parts are installed in one step by uploading and installing one single installation package.

**Section 2: Installation Instructions**

(Section 2 and Section 3 would also be in the separate document "Installation Instruction", by themselves)

Prior to installing the Formulize Integration Extension, you need to have Joomla (version 2.5) and Formulize (Standalone version ? or higher, available at ?) running on the same server.

(What about Cloud Server?)

The Formulize Integration Extension is made of two parts, a component and a plugin. Those two parts will be installed in one step by uploading and installing the zipped file pkg\_formulize.zip. This zipped file includes plg\_formulize.zip and com\_formulize.zip and both of those zipped files will be installed automatically, one after the other.

**Installation Steps:**

1. Make sure you have Joomla 2.5 and Formulize Standalone version ? or higher running on the same server.
2. Download the extension at ?.
3. Go to the Extension Manager.
4. Using Upload Package File, browse your computer for the file pkg\_formulize.zip and hit Upload & Install.
5. Go to the Plug-in Manager.
6. Using the Filter, search for Formulize Plug-in and enable the Plug-in.
7. Make sure there's a green check mark beside Formulize Plug-in in the Status column.

**Important Note:**

If you don't want the user management synchronization between the two systems, you can skip steps 5 to 7. Skipping those steps will keep the Plug-in disabled, preventing Joomla and Formulize to perform useless operation in the background.

**Section 3: Initial Configuration**

After installing the extension into Joomla, the Formulize Integration Extension needs to be configured. Recall that in order for the extension to work, Joomla and Formulize need to be running side by side on the same server.

**Configuration Steps:**

1. If you want to synchronize the user management between the two systems, make sure the Formulize Plug-in is enabled.
2. From the Component Menu, choose Formulize.
3. In the component backend administration, hit the button Configure on the upper right.
4. In the text field of the Parameters tab, enter the path to your Formulize standalone installation. (Example: C:/…/www/websites/your\_Formulize\_website)
5. If you want to synchronize the user management between the two systems, hit the button Synchronize.

**Section 4: Embedding a Formulize form in a Joomla webpage**

Before being able to embed a Formulize form into Joomla, the form itself needs to have been created beforehand from the Formulize administration interface.

**Steps to embed a Formulize form in a webpage:**

1. Go to the Menu Manager: Menu Items and create a new menu item.
2. Select the menu item type Formulize.
3. Enter a title for the new webpage.
4. In the Required Setting section, select the desired form from the drop down list of the Formulize forms that are accessible to the current administrator.

**Section 5: Restricting the access to a Formulize Form into Joomla**

There are two options for restricting the access to a Formulize Form into Joomla. The first option is to put Joomla responsible for respecting all permissions associated to the Formulize forms that are displayed on the website. The second option is to let Formulize handle the permissions.

If the first option is chosen, the webmaster uses the standard Joomla Access Control List (ACL) to handle all the restrictions. That way, a user having no access to a particular form would not even see the menu associated to the form and would never be able to visit the page where the form is displayed.

If the second option is chosen, the webmaster does not have to set any Viewing Access Level. That way, a user having no access to a particular form would still be able to visit the webpage, but would not be able to see the form itself and would get the message "You do not have permission to see that form".

**Section 6: Customization of the appearance of a Formulize form**

It is possible for the webmaster to customize the appearance of a Formulize form by modifying its basic colors through an extremely simple interface. For each Formulize menu item, a parameter can be adjusted in the Advanced Setting section. This parameter consists of one single color field where three (and exactly three) colors in hex format can be entered, separated by commas. If that field contains valid values, the component bases the appearance of the form on those three colors. If nothing or an invalid value has been entered, this parameter is ignored. Note that the same color can appear up to three times.

(Will appear only if I have time to add the menu item parameter. It would be awesome, but I don’t think there is enough time. ☹)

If the general appearance of the form doesn’t suit your Joomla website, it is always possible for an experienced webmaster to modify directly the Extension style sheet directly. This file can be found at this location: your\_path\_to\_Joomla/components/com\_formulize/formulize.css.

**Section 7: Notes on User Management Synchronization**

As mentioned before, users and user groups created in Joomla will be automatically created in Formulize. Note that the reciprocal is not true. This implies that the webmaster needs to perform user management on Joomla users from Joomla and Joomla only. Furthermore, no modification of any user or user groups that was created through Joomla should be performed from the Formulize system. If that basic rule is not respected, unpredictable results may occur.

If, for some reason, the webmaster wish to conduct activities in Formulize that are totally unrelated to Joomla, it is still possible. In that situation, this should be very clear to the webmaster which users and user groups belong exclusively to Formulize and which users and user groups are shared between the two systems.

In order to use the system adequately, the following concepts need to be understood carefully:

1. The three Joomla basics groups Public, Registered and Super Users will exist in both systems and will be directly mapped. Furthermore, they will have the same name. (If this is what you decide!)
2. All Joomla users will be mapped to exactly one user in Formulize, except for the Super User. (If this is what you decide!)
3. Each system will have its own Super User, but those two Super Users will belong to the exact same group, the group of Super Users. (If this is what you decide!)
4. While there is a direct correspondence between the users and the user groups in both systems, it is important to understand that there is no direct correspondence between the permissions granted to each group. The specific permissions associated to each group in both systems need to be set separately and manually by the Super Users.
5. When a user will log into the Joomla system, that user will be automatically logged into the Formulize system using single sign-on.
6. Users created through Joomla will have access to Formulize through Joomla and single sign-on only. They will not have any Formulize password associated to them.
7. The group inheritance structure in Joomla is respected and transmitted in Formulize.
8. The Batch Processing feature for changing user’s group memberships is not supported yet. Hence, you should modify memberships through each user account only.

**Section 8: Troubleshooting**

* After selecting the menu item type Formulize, I don’t see the drop down menu to choose my Formulize form from.

Make sure you configured the component correctly.

* The initial synchronization is failing.

First, make sure you configured the component correctly. Second, make sure all the groups and usernames in Joomla doesn’t already exist in Formulize.

* Past the initial synchronization, no action performed on users or user groups is replicated in Formulize.

Make sure you enabled the Plug-in.

* The users, user groups and memberships in Joomla are not exactly replicated in Formulize.

You may have performed illegal actions. From the component administration, you can hit the Synchronize button one more time. In those special circumstances, you can modify manually the data from Formulize to make it exactly the same as in Joomla.

* I do not get all the formulize forms in the Formulize menu item settings.

If you do not have permission to view a particular form, you do not have permission to embed it in a Joomla webpage.

(This section is likely to become longer when testing will be performed by others...)