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

**Formulize Integration**

**User Guide**

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**Section 1: Description of the Extension**

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 synchronized at all times. That way, users can interact with the forms the same way 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 Formulize webmaster.

Note that this synchronization is one way only. This means that all actions performed on users and user groups in Formulize are not 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**

Prior to installing the Formulize Integration extension, you need to have Joomla (Version 2.5) and Formulize (Standalone Version … available at www.freeformsolutions.ca/formulize) running on the same 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 … running on the same server.
2. Download the extension at ....
3. Go to the Extension Manager.
4. Using the 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 through 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 Formulize Integration extension into Joomla, the 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, click on the Initial Sync link. Note that you can hit that link as many times as you want.

**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 handles 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 containing the form, 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**

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**

These notes only apply if you decide to enable the Formulize Plug-in and to perform the initial 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 only from the Joomla system. Furthermore, no modification of any user or user group that was created through Joomla should be performed from the Formulize system.

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. Each Joomla group will be mapped to exactly one group in Formulize.
2. The three Joomla basic groups (Public, Registered and Super Users) will exist in both systems, will be directly mapped and will play the same role. Furthermore, they will have the same name. This implies that the names of the three basic groups in Formulize will be renamed accordingly.
3. Each Joomla user will be mapped to exactly one user in Formulize.
4. The initial Super User in Joomla will also be mapped the same way. This implies that the Formulize system will count at least two Super Users: the original Formulize Webmaster and the Joomla Super User.
5. 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.
6. When a user will log into the Joomla system, that user will be automatically logged into the Formulize system using single sign-on.
7. 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, unless the Formulize webmaster explicitly creates a password for them. In this case, those users will be able to sign in in both systems.
8. The group inheritance structure in Joomla is respected and transmitted in Formulize.
9. 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.

Make sure you configured the component correctly.

* 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 operations. From the component administration, you can hit the Initial Sync link one more time. Also, in those special circumstances, you can modify manually the data from the Formulize system 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 that form in a Joomla webpage.