

Smart form maker v.3 User Guide

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1. Installation

:Installation of SMART FORM MAKER can be achieved in 2 ways

First Case: Initial Installation of MySQL Form Maker 3.0

: ethis process if

If you do not have a previous version of Smart Form Maker currently installed on your server . ((prior to version 3.0

OR...

You have a previous version of Smart Form Maker AND want to have BOTH the old and new versions of Smart FORM MAKER installed on your server with each version in a separate directory..

Case 1: Initial (First) Installation of Smart FORM MAKER 3.0 .1.1

1.1.1. Upload the "SFM" folder to a new / empty sub-directory on your server. Please note that:

If your forms include confidential data, it is recommended that you protect the installation directory (the directory which you uploaded the "SFM" directory to in step 1.1) with a password, which can be easily accomplished from your own hosting control panel. Instructions for password protecting your directories can be found at the following link: http://docs.cpanel.net/twiki/bin/view/AllDocumentation/CpanelDocs/PasswordProtectDirectories

- "/ Give 755 permission to the forms directory at: "/SFM/forms .1.1.2
- -Browse to the index page of SMART FORM MAKER at: http://your-server .1.1.3 name/path-to-SFM/index.php
- 1.1.4. You will be asked by the program to provide the "connection parameters" of the database you intend to use to generate your Forms. This information must be provided in order to create a new Form.

Please note: For generating a form to insert, update, delete and search records, ONLY the "Select, insert, Update and Delete" permissions are required for the user name. Additional permissions are neither recommended nor required. Similarly, in case you need your form to only insert records, then ONLY the "Select" and the "Insert" permissions are needed.

Second Case: Replace Old version

Uthis process if you want to **REPLACE** an old version of SMART FORM MAKER with the new version of SMART FORM MAKER 3.0 on your server

1.2. Case 2: Replace the old version

It is recommended that you back-up your existing (old) version of Smart Form .1.2.1

- . Maker so that you can restore it if necessary
- In the following steps, the term "Installation Directory" is used to refer to the old version directory. This directory includes three subdirectories: forms, Wizard, and JS
- 1.2.2. Inside the installation directory, you will find a sub-directory named "forms" (as mentioned in step 1.2.1). This sub-directory includes all the forms that you have generated and should be left intact during the installation process.
- 1.2.3. Rename the existing "Wizard" directory to "Wizard.old" or any name of your choosing.
- 1.2.4. Rename the existing "JS" directory to "JS.old" or any name of your choosing.

(Ignore this step if your old version does not include a "JS" directory)

- 1.2.5. Rename" Index.php" to "Index.old.php" or any other name of your choose. similarly rename the "shared.php" file.
- 1.2.6. Upload the new "Wizard" and "js" directories from the new version package to the Installation Directory.
- 1.2.7. Upload the new "Index.php" and "shared.php" file to the installation directory.
- 1.2.8. Upload the "helpers", "styles", "layouts" from the new version package to the Installation Directory.
- 1.2.9. After uploading the files to the Installation Directory, insure that you have the following:
- There are "Wizard", "js", "helpers", "layouts", "styles" and "forms" directories in the installation directory.
- There are an "index.php" and "shared.php" files.
- All your existing Forms are included in the "Installation Directory/forms" Directory.
- An empty index.html file in the root of the "the Installation Directory/forms" Directory. If not, please add one.
- The "the Installation Directory/forms" has 755 permission.

2. Getting started

boxes.



2.1.Connect to MySQL

In this step, you should enter the connection parameters for the database you intend to use to generate your charts.

Server name or IP: Server

User name and password

Please note: For generating a form to insert, update, delete and search records, ONLY the "Select, insert, Update and Delete" permissions are required for the user name. Additional permissions are neither recommended nor required. Similarly, in case you need your form to only insert records, then ONLY the "Select" and the "Insert" permissions are needed.

Database: the database that you intend to use to create your Form.

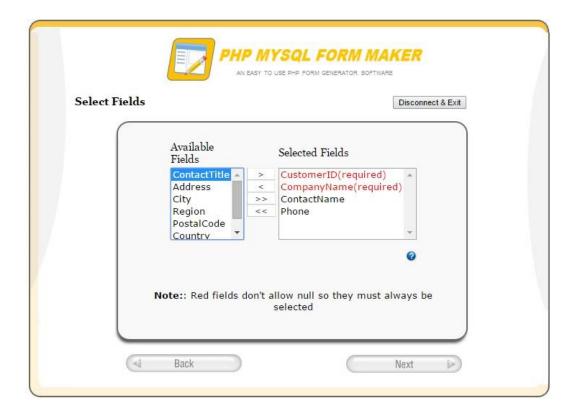
Form Actions: This is what your form should do, for example if you want your form to

insert, Update or delete records you need to check the insert, update and delete

Please enter MySQL database parameters Hostname localhost Username Password Database Connect Select Table Insert Select Form Actions Update

☐ Delete ②

2.2.Selecting the form fields:



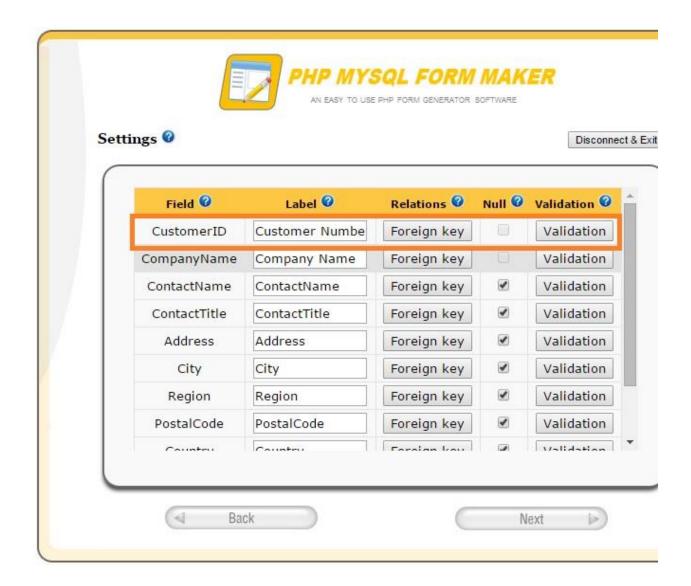
In this step you shoulds The columns that you intend to use in your Form (Required).

Please note that some fields are colored in red and selected by default, these fields don't allow null so they must be selected in your form .

2.3. Fields Settings

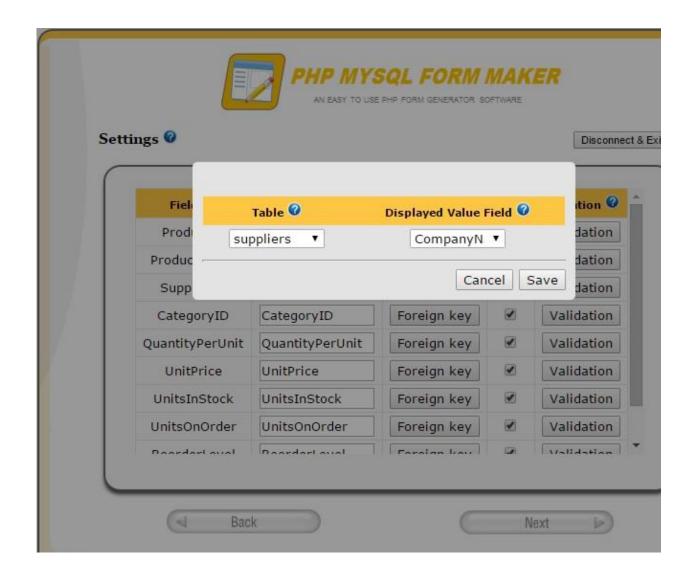
In this step you can do the following:

2.3.1. "Label" your fields to make them more user-friendly with more recognizable / relavent names instead of their SQL names .For example, you might use "Customer Number" instead of "CustomerID"



2.3.2. Setting the Forign keys:

For example, in a "products" form, you might want to display the supplier names instead of their ID numbers. In this case all you need to do is to click the "Forign Key" button beside the "SupplierID" Column. The system will show a pop up window (as shown in the image below) to select the parent table (in this example the supplier table) and the desired column (in this example the Company Name).

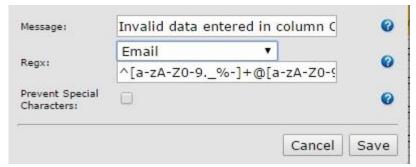


2.3.3. Setting the optional fields:

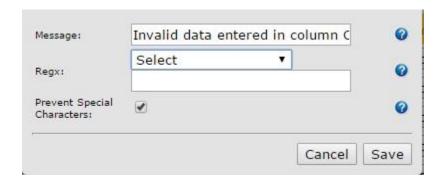
If you check the "Null" boxes beside any field, that field becomes an optional field, which means the user of your form can leave it empty without receiving an error message. Of course, this cannot be applied to all fields because some fields are designed not to allow Null in your DB structure. Therefore, for those fields, the "Null" check boxes are disabled and cannot be made "Optional".

2.3.4 Setting the validation rules:

Using Form maker, you can set validation rules in your forms to validate the submitted data. To set a validation rule for any form field, simply click the "Validation" button beside it. The validation rules match the data type of the field. For example: for a textual form field you can require the submitted data to be a valid email address as shown in the image below



Using Form maker, you can prevent submitting special characters by keeping the "Prevent Special Characters" box checked. This is recommended for security reasons as shown in the image below.



2.4. Selecting form type and style:

In this step you can select the form type and style



SMART Form Maker supports the following form types

2.4.1. Columnar Forms:



2.4.2. Justified Forms:



2.4.3. Tabular (Editable Grid) Forms:

This type can be used for editing multiple records at the same time.



2.4.4. Master / Details Forms

This form type allows you to create relationships. It is possible to analyze the details of a particular record in a very simple manner. Let us assume you have a database with two related tables, "customers" and "orders" and you want to create an "orders per customer "form. In this scenario, the "Master" form should be for the customer's information and the sub-form should be for listing the selected customer's orders. Of course, the master and details forms will be displayed in the same page in order to help you manage your data more quickly



2.4.5. Mobile Forms:





${\bf 2.5. Security\ options\ and\ notifications:}$

2.5.1. The security settings:

: Password Protection

With Smart Form Maker, you can prevent unauthorized access to generated Forms by checking the "Password Protect Generated Form" option and then adding an Admin User .name and password

Each username and password protects one Form, so each Form should have a user name and password. You can also choose to disable the password protection function for some Forms



Alf you forget the admin password for any form, you should do the following:

- 1. Visit the page /SFM/forms/The name of your-form/hash.php , on this page, please enter the new password that you want to use along with the existing user name of your form. The script will return the encrypted value of the new password.
- 2. Copy the generated encryption text.
- 3. Open the configuration file of the generated Form (should be found at " /SFM/forms/The Generated Form Name/config.php") for editing by any text editor like NotePad++
- 4. In the opened configuration file, you should find a line that looks similar to the following

\$form password = "some encrypted password";

Please replace the existing encrypted password with the encrypted text of the new password which you copied in step 2 as shown in the following image.

```
14 $sql = 'czowOiliOw==';
15 | $autodetect = 'Tig=';
16 | $fields = 'YTo2OntpOjA7czoxMDoiRW1wbG95ZWVJRCI7aToxO3M6ODoiTGFzdE5hbWUiO2k6MjtzOjk6IkZpcnN0TmFtZSI7aTozO3M6OToiTWFuYWdlc
17 $layout = 'czo3OiJUYWJ1bGFyIjs=';
18 $style_name = 'czo0OiJibHVIIjs=';
19 $form allow security = 'aToxOw==';
20  $form_username = 'czo40iJkaW5hMTQxMCI7';
21
      $form password = 'czo:
22
     $allow notification = 'aTowOw==';
23 | $title = 'czo10iJmb3JtNyI7';
$\footnote{\text{34} \quad \text{$\date_created = 'czoyMDoiMjUtSmFuLTIwMTUgMTU6MDc6MTAiOw==';}
25
      $form desc = 'czo20iJmb3JtIDci0w==';
      $file_name = 'czo20iJmb3JtIDciOw==';
26
27 $records per page = 'aToxMDs=';?>
```

2.5.2. The Email Notifications:

The new version of Smart Form Maker allows you to receive email notifications whenever someone insert s, searches, updates, or even deletes records using your .form . The email message will include the submitted data

Once this feature is enabled, you will have the ability to:

- 1. Add the email address to which the notifications should be sent.
- Select what actions you want to be notified of when they occur. For example, you
 might want to receive email notification when someone inserts a new record through
 your
 form



Please note that If the email notification feature is important to you, you need to test it with dummy data at least once after generating the form. This will ensure that email notifications are received correctly in your email box.

Stop receiving email notifications from a form:

If you have a notification going on for a specific form and you no longer wish to receive email notifications from this form, all you need to do is :

- Opening the configuration file of the form which sends the notifications, it should be found at: "SFM/forms/The name of the Form/config.php" for editing by any text editor like NotePad++
- Delete all the lines which start with the term "\$notification_" such as the following 5 lines:

```
$notification_email = 'czoyNDoiZ2DEyMDAuuuhvdG1haWwuY29tljs=';
$notification_insert = 'aToxOw==';
$notification_update = 'aToxOw==';
$notification_delete = 'aToxOw==';
$notification_search = 'aTowOw==';
```

2.5.3. Titles

In this step, you can customize your Form by adding a title (10 characters maximum) and a description (20 characters maximum) which should appear at the top of your generated form

3. FAQ:



3.1.- Once click Finish, I get the error message: "Can't open file for permission issue" why is that?

This permission issue has nothing to do with the system. It means the system can't create a configuration file and write the settings into it for a permission issue on your server. The solution is simply to make sure the following two directories have a 755 permission:

- 1) /SFM/forms/
- 2) /SFM/forms/your generated Form sub directory/

?What's new with Smart Form Maker version 3.0 .3.2

SMART FORM MAKER Version 3.0 employs several newly released PHP functions which are designed to offer more robust and stable security measures within the software

The new version also includes many new features such as the following:

Ability to search and Sort records in the generated Forms



The search feature will be disabled if the selected form action is to insert new records only .



- Ability to send email notifications

The new version of Smart Form Maker allows you to receive email notifications whenever someone insert s, searches, updates, or even deletes records using your . form . The email message will include the submitted data

Once this feature is enabled, you will have the ability to:

- 1. Add the email address to which the notifications should be sent.
- 2. Select what actions you want to be notified of when they occur. For example, you might want to receive email notification when someone inserts a new record through your form along with the inserted data.



Ability to password protect generated Form

With Smart Form Maker, prevention of unauthorized access to your Forms is accomplished by checking the "Password Protect Generated Form" option and then adding a username .and password for your form

Ability to change the style of the generated form

Smart Form maker 3.0 allows your users to change the style of the forms by selecting the desired styles from the styles menu.

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3.3. I can't connect to mySQL database, what should I do?

You are getting this error because the script cannot connect to your database with the information you have provided.

Make sure you have the correct username and password, if you are sure you have the correct login and password with the right Privileges, then you need to check with your administrator because you definitely have either the wrong log in or Privileges and that's why your script cannot connect to your mysql database.

The Script using the classic mysql_connect PHP built-in function: http://php.net/manual/en/function.mysql-connect.php

If the server name, user name, password are correct it should work fine.

3.4. Once a Form design is created, how do I make changes to it?

If your form is protected (i.e. has a user name and a password) once creating it, you can click back and get back to the wizard in order to change some options then regenerate the form.

Once you have finished editing, click the "logout "link. The form will then be un-editable.

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3.5. How to stop receiving email notifications from a Form?

If you have a notification going on for a specific form and you no longer wish to receive email notifications from this form, all you need to do is:

- Opening the configuration file of the form which sends the notifications, it should be found at: "SFM/forms/The name of the Form/config.php" for editing by any text editor like NotePad++
- Delete all the lines which start with the term "\$notification_" such as the following 5 lines:

```
$notification_email = 'czoyNDoiZ2DEyMDAuuuhvdG1haWwuY29tljs=';
$notification_insert = 'aToxOw==';
$notification_update = 'aToxOw==';
$notification_delete = 'aToxOw==';
$notification_search = 'aTowOw==';
```

3.6. What If I forget a form password?

If you forget the admin password for any form, you should do the following:

- 1. Visit the page /SFM/forms/The name of your-form/hash.php , on this page, please enter the new password that you want to use along with the existing user name of your form. The script will return the encrypted value of the new password.
- 2. Copy the generated encryption text.
- Open the configuration file of the generated Form (should be found at " /SFM/forms/The Generated Form Name/config.php") for editing by any text editor like NotePad++
- 4. In the opened configuration file, you should find a line that looks similar to the following

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Please replace the existing encrypted password with the encrypted text of the new password which you copied in step 2 as shown in the following image.