

User Guide For Record Controller Plug-in (Smart Former Gold)

version 1.0

Table of contents

- 1. Introduction3
- 2. Installation3
- 3. Usage4
 - 3.1. Records4
 - 3.1.1. Submission Time5
 - 3.1.2. Last Edit Time5
 - 3.1.3. Status5
 - 3.1.4. Form name5
 - 3.1.5. Form ID5
 - 3.1.6. Username5
 - 3.1.7. Preview5
 - 3.1.8. Link to the form5
 - 3.1.9. Hash5
 - 3.2. Settings6
 - 3.2.1. Registered users access only6
 - 3.2.2. Limit one record for one user7
 - 3.2.3. Allow editing form records7
 - 3.2.4. Status of record after submitting7
 - 3.2.5. Disable access after X days ("0" - no limitation)8

1. Introduction

Record Controller is the plug-in for Smart Former Gold component. It provides the full management of forms submissions from both front-end and back-end. Users can come back to the form and edit it. Admin can permit or discontinue permissions for editing.

The plug-in can be purchased from this page <http://www.itoris.com/index.php/products/joomla-form-builder#plugins>. After the payment is made you will receive the email with your login details. Please use them to log in to <http://www.itoris.com> and download the Record Controller and save it on your PC.

2. Installation

To install Record Controller you should have Smart Former Gold installed and activated. Please open the admin area and select Smart Former Gold (SFG) from the menu (**Components** → **Smart Former Gold** → **SFG Plugin Manager**). You will see the page with all your SFG plug-ins and the ability to install new plug-ins.

The screenshot shows the 'SFG Plugins' management interface. At the top, there are navigation tabs: 'Form Manager', 'SFG Plugin Manager', and 'SmartFormer Gold Installer'. A message banner states 'Plugin have been installed successfully'. Below this is a table of installed plugins:

#	Plugin Name	Active	Description	Author	Date	Version	Order	Actions
1	SmartFormer to SFG forms converter		This plugin allows you to migrate your forms from SmartFormer to SmartFormer Gold component.	IToris Inc. (www.itoris.com)	May 2009	1.0	1	Uninstall
2	PDF plugin		This plugin allows administrator to export submissions into PDF format.	IToris Inc. (www.itoris.com)	June 2009	1.0	2	Uninstall

Below the table, there is an 'Upload plugin:' section with a 'Browse...' button and an 'Upload' button. A 'Display # 20' dropdown is also visible.

Joomla! is Free Software released under the GNU/GPL License.

Under the list of plug-ins there is the ability to browse and upload the new plug-ins. Please click the **Browse** button to find your version of Record Controller on your PC and upload it. After it is uploaded – you will see it in the list of SFG plug-ins.

This screenshot shows the 'SFG Plugins' manager after the Record Controller plugin has been installed. The table now includes a third entry:

#	Plugin Name	Active	Description	Author	Date	Version	Order	Actions
1	SmartFormer to SFG forms converter		This plugin allows you to migrate your forms from SmartFormer to SmartFormer Gold component.	IToris Inc. (www.itoris.com)	May 2009	1.0	1	Uninstall
2	PDF plugin		This plugin allows administrator to export submissions into PDF format.	IToris Inc. (www.itoris.com)	June 2009	1.0	2	Uninstall
3	Record controller		This plugin allows you to control records in your form.	IToris Inc. (www.itoris.com)	May 2009	1.0	3	Uninstall

The 'Upload plugin:' section and 'Display # 20' dropdown remain visible at the bottom.

If you see the Record Controller – then it is successfully installed and activated. Now it is ready for use.

If you do not see the Controller or got an error during the installation – please contact Support Department. You will get the contact details in the email together with the login details.

To make Record Controller work correctly please make sure that when you create a form it saves data **once only** (on the last step normally). **I.e.** if your form has several pages – you tick **Save Data** checkbox in the properties of your buttons only for the last **Submit** button.

3. Usage

3.1. Records

After the Record Controller is installed – please set it to suit your needs. To set and use it please Open the main page of SFG (**Components** → **Smart Former Gold** -> **Form Manager**). In the top bar you will see the additional button **RecordControl**.

#	Form Name	Description	Records	Active	Actions	Direct URL to the form
1	Contact Us	Sample form. Allows collecting visitors' requests from the external part of the site. Features: * Conditional branching. Displaying states when US is selected * Expanding the form when a new field is added * Protected with Captcha * Saving the time of submission	4		Clone Backup	http://products.itoris.com/smartformer2/index.php?option=com_sfg&formid=1
2	Login Form	Sample Form. Alternative login form. Can be inserted into a position as module. Features: * login form on the first page. It opens if the user is not logged in * logout form on the second page. Opens if the user is logged in. Username is taken from the user's	no db		Clone Backup	http://products.itoris.com/smartformer2/index.php?option=com_sfg&formid=2

Please click the **RecordControl** button. Here you will see all submissions (records) of all your forms. The records are sorted by default to newest first. Please use the filter above the records to select the ones from one form only. The following data is available here:

#	Submission time	Last edit time	Status	Form name	Form id	Username	Preview	Link to the form	Hash
1	-	-		anya	30	Site visitor	Preview	Form	711f9b01333224281f307df47915a563
2	-	-		test_dynamic	65	Site visitor	Preview	Form	a2191a0bfff054afc3f4e01140bf826d
3	-	-		test_transfer_3	62	Site visitor	Preview	Form	9945a0a403865a697efef0c6253dc83f1
4	-	-		Short Sale Path Application	12	Site visitor	Preview	Form	de9afed68a3783ee06159f1ff958d265
5	-	-		Registration4Surveys form	11	Site visitor	Preview	Form	e22d1704b21a87d3b465be89a94833ff
6	-	-		Registration4Surveys form	11	Site visitor	Preview	Form	ad356109a10abd4374121c4277b4f76f
7	-	-		Registration4Surveys	11	Site visitor	Preview	Form	9c30c6a8cd84868b53662c2519e4195a

3.1.1. Submission Time

Date and time when the form has been submitted (this current record created). If the plug-in has been set after the form has been submitted, the previous records will have the empty filed here. The data is added here one time and is not changed any longer.

3.1.2. Last Edit Time

Date and time when the record has been edited last. This filed will be changed with every editing of the record.

3.1.3. Status

Status of the record (published/unpublished). If the record is unpublished, then it is not editable from the front-end any longer.

3.1.4. Form name

The name of the form this record belongs to.

3.1.5. Form ID

ID of the form.

3.1.6. Username

The name of the user who has added the record (submitted the form). If your form is available to non-registered users and the user has not been logged in while submitting the form - then you will see “*Site visitor*” here.

3.1.7. Preview

This link allows viewing the record via the back-end.

3.1.8. Link to the form

The direct URL of the form – front-end.

3.1.9. Hash

This is a unique link for each record. It will open the filled form (it should be used for editing from the front-end the previously submitted form). If you want your users to edit the previously submitted form – you can email this link.



To email this link you should set your form so that your users receive notification email after they submit the form (please see *Smart Former Gold’s manual for more details*).

In the email template please add the dynamic variable (selectable from the drop down menu in email templates) `{return_url}`. Your user will receive the direct link to the form which will be used for editing later on.



The records submitted before you install Record Controller will not have Hash link.

3.2. Settings

The settings of Record Controller can be made and changed if you click **Settings** button on the main plug-in's page (see the image above).

When the button is clicked – you will see the list of your forms and all settings available for them. Different forms can have different settings.

To check which properties your form has for now – put your mouse over the property near the form. You will see the hint with explanation.

The following settings are available for the forms:

FormManager.

Record Controller.

Settings

Registered only

Any user

One record for user

Many records for user

Allow editing

Disallow editing

Show on submit

Hide on submit

Save

Apply

Cancel

Form Manager
SFG Plugin Manager
SmartFormer Gold Installer

#	<input type="checkbox"/>	id	Form name	Registered users access only	Limit one record for one user	Allow editing form records	Status of record after submitting	Disable access after X days ("0" - no limitation)
1	<input type="checkbox"/>	1	Contact Us					<input type="text" value="0"/>
2	<input type="checkbox"/>	2	Login Form					<input type="text" value="0"/>
3	<input type="checkbox"/>	3	Registration Form					<input type="text" value="0"/>
4	<input type="checkbox"/>	4	Survey					<input type="text" value="0"/>
5	<input type="checkbox"/>	5	Shopping Cart					<input type="text" value="0"/>


3.2.1. Registered users access only

By default the form can be submitted by both logged in user and visitors. This setting allows form's submission/editing for the logged-in users only. If the not logged-in user tries to open the form – he/she will see the error message “Only registered users can work with this form”.

If you need this setting for one form only – please click the default red cross icon () of the appropriate column near the form. If you need this setting for several forms – please tick them and press **Registered only** button in the top bar.

- all users can submit/edit the form
- logged in users only can submit/edit the form


In the image below Form 1 and Form 3 can be submitted by logged in users only. Form 2 and Form 4 can be submitted by all users:





FormManager.


Record Controller.


Settings


 Registered only


 Any user


 One record for user


 Many records for user


 Allow editing


 Disallow editing

 Show on submit


 Hide on submit

















 Save

 Apply

 Cancel


Form Manager
SFG Plugin Manager
SmartFormer Gold Installer



 Selected forms can be filled by registered users only

#	<input type="checkbox"/>	id	Form name	Registered users access only	Limit one record for one user	Allow editing form records	Status of record after submitting	Disable access after X days ("0" - no limitation)
1	<input type="checkbox"/>	1	Contact Us					<input type="text" value="0"/>
2	<input type="checkbox"/>	2	Login Form					<input type="text" value="0"/>
3	<input type="checkbox"/>	3	Registration Form					<input type="text" value="0"/>
4	<input type="checkbox"/>	4	Survey					<input type="text" value="0"/>

3.2.2. Limit one record for one user



By default the logged in users can submit the same form as many times as they wish. If you need that each user can submit the same form one time only – please use this setting.


 Here we deal NOT with editing, but with initial submission. E.g. if you have a Contact Us form, each user in your system can contact you as many times as he/she needs. But if you have a Survey form – you can allow your user to submit it once only, though he/she can edit later on the submission. But he/she can not start a new survey with the same form.

-  - the number of submissions per one user is NOT limited
-  - a user can submit the form once only

3.2.3. Allow editing form records

By default users can not edit their previously submitted form. This setting allows to edit the submitted forms from the front-end. Each user should have a unique URL to the form (Hash). When he/she opens the previously submitted form using this URL – the form will be filled in with the previous data.



-  - users can NOT edit their previously submitted form
-  - users can edit their previously submitted forms


 Please make sure your users have the unique URL (Hash) to their previously submitted form is you want the form to be editable. Either include this URL to the email or provide it to your users in some other way.


If the form is not allowed for editing, when a user tries to open the form using the Hash – he/she will see the following error message “This form is not available for editing”.

3.2.4. Status of record after submitting

By default the status of the record is unpublished after submit. It provides the admins with the ability to check the record before allowing it to be visible on the front-end.

-  - record is unpublished. It is not visible from the front-end
-  - record is published. It is visible from the front-end

 Please make sure the status is published if you want the ability for your users to edit their submissions later on.

 This can be used is you use forms to add the content to your site.

3.2.5. Disable access after X days ("0" - no limitation)

Here the number of days during which the record can be edited from the front-end is set. After the time is over – if users try to open the form using the Hash – they will see the following error message “Time for editing of this form is out”.

If **0** is set here – the form can be edited with no time limitations.

To set the limitation please add the number of days to the forms and use **Apply/Save** buttons from the top bar to save the change.