

## USER AGREEMENT

### **1. General**

E-Centric, Inc. provides the FormulatorNET software, subject to your compliance with the terms and conditions listed below and any and all terms and conditions listed in the license agreement you agreed to prior to your purchase of the software. By installing this software, you affirm that you have read and agree with all the terms and conditions stated herein, and are bound by same. If you do not agree, you may not install this software.

E-Centric, Inc. reserves the right, at its discretion, to change or modify any or all parts of this Agreement at any time, effective immediately upon notice published on E-Centric, Inc.'s Web site. Your continued use of the Service constitutes your binding acceptance of these terms and conditions, including any changes or modifications made by E-Centric, Inc. as permitted above. If at any time the terms and conditions of this Agreement are no longer acceptable to you, you should immediately cease all use of the Service.

### **2. User Rights and Use**

E-Centric, Inc. grants to you non-exclusive, non-transferable rights to install and use the Software as follows:

1. At any time, a maximum of one installation or one copy of the Software may be hosted on a Web server that is accessible over the Internet or Intranet.
2. You may install the Software on a maximum of three hard-drives at a time, *but no more than one of these installations or copies of the Software may grant Web users access to the Web application over the Internet or Intranet*. In other words, you may install the Web application, for example, (1) on your local hard-drive for development purposes, (2) on a second Web server for testing purposes, and (3) on a third Web server for deployment, but only one copy (i.e., the deployment copy) shall be accessible over the Internet or Intranet.

### **3. Limitations on End User Rights**

(a) You may not copy the Software, except for a backup copy to be used only in the event of loss or damage to the original copy.

(b) You may not resell or redistribute the Software without prior written permission from E-Centric, Inc.

(c) You may not use, modify, translate, reproduce, or transfer the right to use the Software or copy the Software except as expressly provided in this Agreement.

(d) You may not reverse engineer, reverse compile, disassemble, or otherwise attempt to discover the source code of the Software (except to the extent that this restriction is expressly prohibited by law) or create derivative works based on the Software unless you have purchased source code directly from E-Centric, Inc.

(e) If you have purchased source code directly from E-Centric, Inc., you may create derivative works based on the Software; however, you may not resell or redistribute the derivative works without prior written permission from E-Centric, Inc. (except to the extent that this restriction is expressly prohibited by law).

### **3. Endorsement**

Neither the name E-Centric, Inc. nor the names of its contributors may be used to endorse or promote products derived from this software without specific prior written permission.

### **4. Indemnification**

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE COPYRIGHT OWNER OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE. YOU EXPRESSLY AGREE THAT THE ENTIRE RISK AS TO THE QUALITY AND PERFORMANCE OF THE SERVICE, INCLUDING BUT NOT LIMITED TO THE SOFTWARE, SUPPORTING DOCUMENTATION, THE EXPRESS OR IMPLIED RECOMMENDATIONS OR ADVICE OFFERED BY E-CENTRIC, INC. OR ITS AGENTS (WHETHER THROUGH THE WEBSITE, EMAIL, OR OTHERWISE), AND THE ACCURACY OR COMPLETENESS OF ANY AND ALL CLAIMS BY E-CENTRIC, INC. (WHETHER THROUGH THE WEBSITE, EMAIL, SUPPORTING DOCUMENTATION, USER MANUALS, INSTALLATION GUIDES OR OTHERWISE) IS ASSUMED BY YOU. NEITHER E-CENTRIC, INC., ITS AGENTS, EMPLOYEES NOR ANY THIRD PARTY CONTENT PROVIDER OR CONTRIBUTOR OR ITS AGENTS SHALL BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OF OR INABILITY TO USE ANY AND ALL PRODUCTS OR SERVICES OFFERED BY OR THROUGH E-CENTRIC, INC.

## FEATURES

*Formulator.NET is an on-the-fly form builder enabling businesses and individuals alike to create forms for their Internet and Intranet websites. When you build a form with Formulator.NET, a full-featured administrative system is already in place to help you to manage submissions, complete with an easy-to-use interface for viewing, modifying and performing other tasks on submissions such as changing statuses, adding comments and reassigning work.*

*Formulator.NET has been used to quickly develop applications such as Web-based Employment Applications, Task Tracking, Help Desk and Reservation systems – systems which could otherwise take a programmer weeks to develop.*

- Group Administrative Users in Departments.
- Manage users and assign roles. System roles include:
  - *Super Admin*: Full control over all departments and forms.
  - *Department Admin*: Full control over users within the same department.
  - *Formulator*: Ability to build forms.
  - *Task Handler*: Manages department's form submissions.
- Create custom roles which can be used to further restrict admin users from performing certain tasks, such as deleting submissions.
- Manage Custom Templates and upload your own stylesheets to make the forms' look-and-feel consistent with your Website's design. (Simply upload your HTML, or create it in the Rich-Text WYSIWYG editor.)
- Make a form live or take it offline with the click of a button.
- Lock forms to prevent accidental modifications.
- Build forms in an easy-to-use Wizard.
- Forms can consist of multiple pages and/or multiple sections.
- Apply Conditions to pages, sections, questions, or answer controls; thus, showing or hiding each item based on user input from previous questions.
- Create a Workflow, thus assigning each submission to administrative users based on their roles and the submission's current status.
- Create Status Sets to apply to forms. E.g., an Employment Application system might have a status set including the following statuses: Received, Reviewed, Interviewed, Background Checked, Hired, and On File.
- Send Autoresponse emails to users when the form is submitted.
- Send an Email notification to the form owner when a submission is received with the submission results, and/or save the data to the database.
- Submissions enter administrative users' Work Queues which behave similarly to email inboxes and can be managed easily from the admin tool.

- Perform tasks on submissions such as *Reassigning* the work to another admin user, *changing the Status*, adding *Comments*, *Editing* the submission data, or *deleting* the submission.
- View submission *History* which records all status changes, assignments, and comments.
- *Assign multiple response types* to a single question. E.g., The question, “What is the city and state in which you reside?” may have two fields – one text field for the user to enter the city name and one dropdown list with the state codes.
- Specify which response fields are *Required Fields*.
- Determine *Control Types* for each response: Dropdownlists, Textboxes, Radiobuttons, Checkboxes, Rich-Text WYSIWYG editor, Text Area, Listboxes, Date Control, File Upload, and Numeric Input.
- Automatically assign *Reference Numbers* to submissions and quickly find a submission based on the reference number.
- Add *date, Web link and email controls with validation* (complete with a calendar pop up for the date control).
- Use data from *external sources* (i.e., another database on the server) to populate dropdownlists with answer options or *upload responses* from a csv file.
- *Search Submissions* and *Filter* by date, assignee, status, or question responses.
- *Admin Homepage* displays most recent projects, most active projects, and the most recently submissions in the user’s Work Queues.
- *Requires no coding*; simply install the database and web application and begin building forms.

## **REQUIREMENTS**

The *FormulatorNET* application was designed and tested with the following software:

- .NET Framework version 1.1
- Internet Explorer 6.0, Netscape 7.2, Opera 8.5
- SQL Server 2000
- Internet Information Services (IIS)

***Important Notice:** Although *FormulatorNET* should function with newer versions of the above software, no guarantees are made as testing was performed with the above software only.*

*Installation and setup information provided in this document, and email support assume you are using the above software.*

*Finally, due to the “soft” nature of *FormulatorNET*, we cannot offer any refunds on purchases or donations. It is your responsibility to verify you have the correct software and server setup before purchasing *FormulatorNET*.*

## INSTALLATION

**Note:** If you have installed previous versions of FormulatorNET, we recommend you completely remove them before installing this version.

### Uninstall Previous Installations of FormulatorNET

To remove FormulatorNET do the following:

1. In Control Panel, open Add or Remove Programs.
2. Select FormulatorNET, and click the remove button.
3. Open SQL Enterprise Manager and delete the FormulatorNET database.
4. Open Windows Explorer. Navigate to and delete the FormulatorNET application root directory (if Step 2 above didn't completely remove it).

### Install FormulatorNET

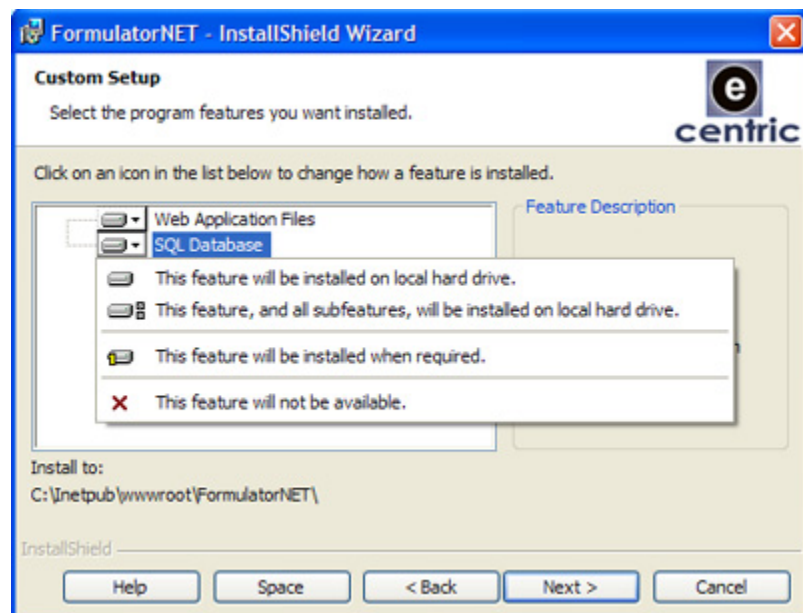
Installation and set up of the *FormulatorNET* Web application is a quick and simple process.

### **InstallShield Wizard**

1. *Run the Installer* (FormulatorNET.exe) on the web server. The InstallShield Wizard will open. Click *Next*.
2. After accepting the License Agreement, select the *Destination Folder* to extract all the necessary application files. By default the Installer will extract these files to your Web server's web directory (e.g., *inetpub/wwwroot*). Note that the installer will attempt to create the *Virtual Directory* for you. The name of this *Virtual Directory* will be **FormulatorNET**, and cannot be changed until after the installation has completed. Click *Next*.

3. On the next screen you can select the features to install. If you wish to create the SQL Database manually, in the **Custom Setup** screen, select *SQL Database* and *This feature will not be available*. Web Application Files, however are required, and cannot be deselected.

Click *Next* again.



4. If you have chosen to install the SQL Database, the *Database Server* screen appears. Select the SQL server and enter login information. (Note the database will be installed as **FormulatorNET**. You cannot specify another name. If you want to specify a different

name, skip this feature, and after installation, you will be able to [create the database manually](#).) Click *Next*.

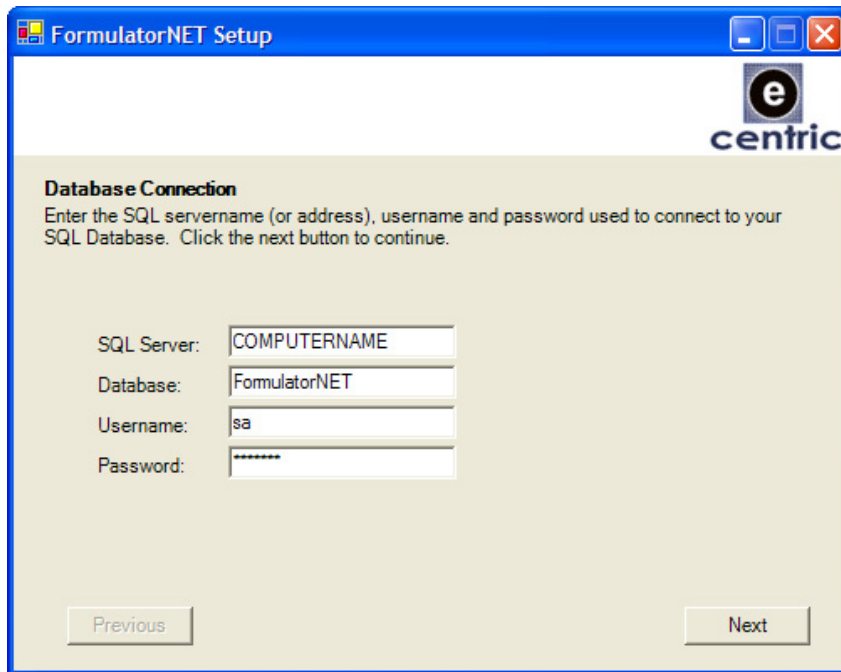
5. On the next screen, simply click the *Install* button.
6. When you click *Finish* on the next screen, the *FormulatorNET Configuration* application will launch.

## FormulatorNET Configuration

This application will configure and test FormulatorNET for you. To launch this application at a later time, run *FormInstaller.exe* found in your Web Application's root directory. If you want to configure your application manually, you will need to modify the *Web.Config* file found in your Web application's root directory per the instructions given in the section "[Manual Configuration](#)" later in this document.

If you did not install the database yet, you will not be able to complete the configuration. Instead, close this window and install the database. See further down in this document for [manual Database installation instructions](#).

1. **Database Connection:** Enter the SQL server name (or address), username and password used to connect to your database. The default database name is **FormulatorNET**.



The screenshot shows a Windows-style window titled "FormulatorNET Setup". In the top right corner, there is a logo for "centric" consisting of a lowercase 'e' inside a circle. The main content area has a heading "Database Connection" followed by the instruction: "Enter the SQL servername (or address), username and password used to connect to your SQL Database. Click the next button to continue." Below this, there are four input fields: "SQL Server:" with the text "COMPUTERNAME", "Database:" with "FormulatorNET", "Username:" with "sa", and "Password:" with "\*\*\*\*\*". At the bottom of the window, there are two buttons: "Previous" on the left and "Next" on the right.

2. **SMTP Connection:** Enter the SMTP (e-mail) server name. FormulatorNET allows form builders to send autoreponse emails to people submitting the forms. Enter a default sender and a default subject for these autoreponse emails. Note that sender and subject can always be changed for each form created. The default is only for convenience.

**FormulatorNET Setup**

**centric**

**SMTP Connection**  
 Enter the SMTP (mail) servername, a default email address and default subject to appear in the email headers for autoresponders sent to people who submit the forms you create. Click the next button to continue.

SMTP Server:

Default Sender:

Default Subject:

3. Web Setup: Select the path to the physical location of FormulatorNET's *web application directory*. The *root directory URL* is the base URL you and the users will use to access the application. On development machines, this could be `http://localhost/FormulatorNET`, however, the URL to deployed applications will normally take the form of `http://www.domainname.com/FormulatorNET`. Enter a *Page Unavailable Note* to display to users when a form is offline. Enter a default *Confirmation Message* to display when forms are submitted. This message is provided for the convenience of Form builders, but can be customized for each form created.

**FormulatorNET Setup**

**centric**

**Web Setup**  
 Enter the path to the physical location of the FormulatorNET web app, the URL you will use to access the application, a short message for unavailable forms and a default form submission confirmation message. Click the next button to continue.

Web App Directory:

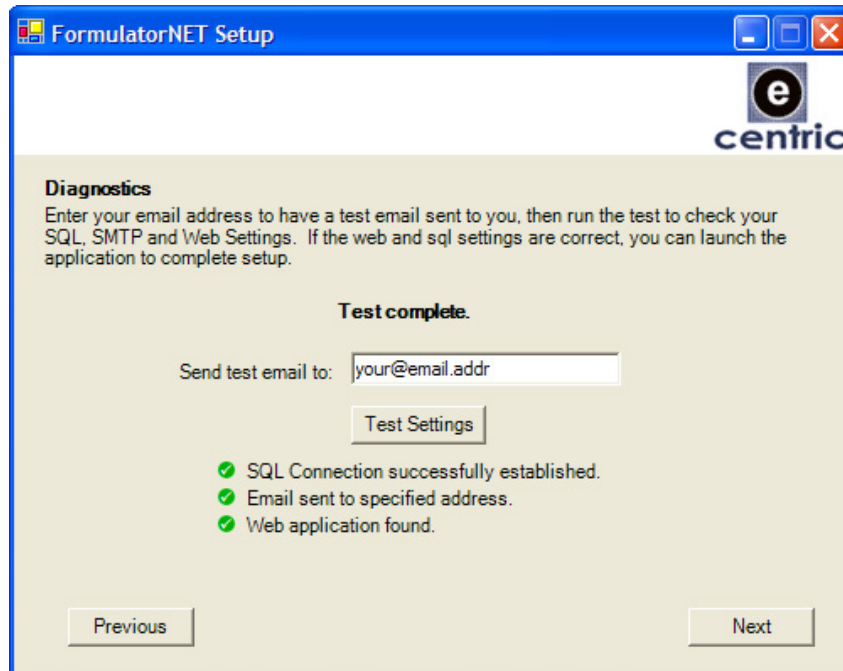
Root Directory URL:

Page Unavailable Note:

Confirmation Message:

4. **Diagnostics:** In “*Send test email to*”, enter your email address to have a test email sent to you. Click on *Test Settings* to test your configuration. If at least the SQL Connection and Web Application settings are correct, the settings will be saved. Click *Next* to launch your Web Application. This will open the *Application Setup Web* page, which will test that the *IUSR\_YourComputerName* has permissions to the directories to which it requires write permissions. You will also be able to register your product. This is discussed in the [next section](#).

If Diagnostics did not complete successfully, see [Troubleshooting](#) further down this document.



### Application Setup Check (Web page)

When the page loads, the application checks that the *IUSR\_YourComputerName* has permissions to the directories to which it requires write permissions. If any of the checks fail, you will be notified and you will need to manually give the permissions to the following directories and *all of their subdirectories and files*:

- ~/parser
- ~/forms
- ~/admin/skins

Give *Full Control* to the *IUSR\_YourComputerName* account for each of the above directories by following these steps:

1. In *Windows Explorer*, navigate to the Web application’s root directory.
2. Right-click on the directory and select *Sharing and Security...*
3. In the *Properties* dialog, click on the *Security* tab.
4. Click the *Add...* button to open the *Select Users or Groups* Dialog.
5. Click the *Advanced...* button.
6. Click *Find Now*.
7. Select the *IUSR\_YourComputerName* account, and click OK.

8. Click OK again.
9. Back in the *Properties* dialog, select the *Internet Guest Account* and check the *Allow* checkbox for *Full Control*.
10. Click OK to finish.

Once you have added permissions to the appropriate directories, you can refresh the *Application Setup Web* page to re-test the setup.

### First-Time Log In:

Assuming you have a successful *default* installation, you can access the login page with the following URL: <http://localhost/FormulatorNET/admin/login.aspx>.

The first time you log in, you will log in as a Super Admin user (with the full control). The Username is "admin", without quotes. No password is required.

The first time you log in you will be asked to change your password. Once changed, you might want to modify your account. Click on *User Accounts* in the left navigation menu, select "Super User", and modify accordingly.

For further help with FormulatorNET's admin system, click on *Admin Help* in the left navigation menu.

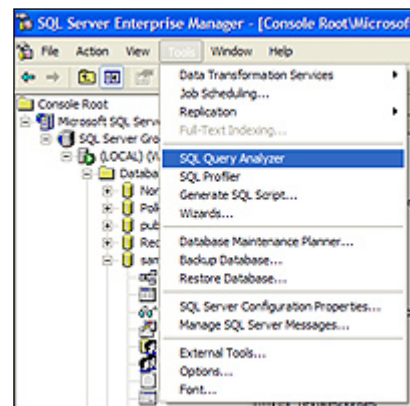
### Manual Database Installation

If you have chosen to create the Database manually, you must do the following:

There is a single SQL script you must run on your *SQL Server* to build the database. The file is located in the Web application's root directory and is named **Formulation.sql**.

Open the *Formulation.sql* file in *SQL Query Analyzer*. To open *Query Analyzer* from *Enterprise Manager*, click on *Tools* from the menubar and select *SQL Query Analyzer*. *Query Analyzer* opens in another window. Click *File* in the menubar and select *Open...*

The *Open Query File* dialogue box opens. Navigate to the *Formulation.sql* file in the application's root directory, and open the file.



If you want to give the database a different name from the one specified in the file ("FormulatorNET") change the "Create Database" and "Use" values to the name you want to give it.

Press *F5* on your keyboard to execute the script.

If you return to *SQL Server Enterprise Manager* and refresh the databases, you should see your new FormulatorNET database listed under the databases.

## Manual Virtual Directory Creation

If the InstallShield Wizard was unable to create the FormulatorNET Virtual Directory for you, you must open IIS Manager, and create the virtual directory yourself.

- If you installed the application files to your Default Web Root directory, then you simply need to navigate to that directory in IIS Manager, right-click on it, select *Properties*, and in the *Directory* tab, click the *Create* button under *Application Settings*.
- Otherwise, Right-Click on the *Default Web Site*, select *New...* and *Virtual Directory*. Follow the *Virtual Directory Creation Wizard*.

## Manual Configuration

To manually update the configuration values necessary for the application to function – a task which the [FormulatorNET Configuration Application](#) simplifies for – open the *Web.config* file found in the root of the application directory. The values for each of the keys between the *appSettings* tags must be updated according to your setup.

- masterDb: Update the *Server* (SQL server name), *uid* (username), and *pwd* (password) values. This is the user account login info that is used to connect to the server's master database. (Do not add a database name to this string).
- sqlConn: , Update the *Server*, *uid* (username), *pwd* (password) *and Database* name of the FormulatorNET database. This is the connection string to the FormulatorNET database.
- SMTPServer: This is the name of the SMTP (email) server.
- ApplicationURL: URL to the application's root.
- DefaultSender: Sender of autoresponse emails. This can be customized in admin tool for each form created.
- DefaultSubject: Subject of autoresponse emails. This can be customized in admin tool for each form created.
- FCKeditor:UserFilesPath: Change only the Virtual Directory if needed.
- Unavailable: Message for unavailable or unpublished forms.
- DefaultConfirmation: Short confirmation message for submitted forms (can be customized in admin tool for each form created.)

```
<appSettings>
  <!-- ***** -->
  <!-- masterdb: ONLY UPDATE SQL Server servername, username, and password
        DO NOT add a database name to this connection string-->
  <add key="masterdb" value="Server=;uid=sa;pwd=;database=" />

  <!-- sqlConn: UPDATE SQL Server servername, username, user password, AND
        name of the database that came with this application -->
  <add key="sqlConn" value="Server=;uid=sa;pwd=;database=FormulatorNET;" />

  <!-- SMTPServer: Update Smtip Servername -->
  <add key="SMTPServer" value="localhost" />

  <!-- ApplicationURL: Update URL to point to application's root -->
  <add key="ApplicationURL" value="http://localhost/FormulatorNET" />

  <!-- DefaultSender: Sender of autoresponse emails (can be customized in admin tool) -->
  <add key="DefaultSender" value="support@localhost" />

  <!-- DefaultSubject: Subject of autoresponse emails (can be customized in admin tool) -->
  <add key="DefaultSubject" value="Submission Received" />

  <!-- UserFilesPath: Change Virtual Directory only if needed-->
  <add key="FCKeditor:UserFilesPath" value="/FormulatorNET/forms/skins/" />

  <!-- Unavailable: Message for unavailable (unpublished) forms -->
  <add key="Unavailable" value="The page you requested is not available." />

  <!-- DefaultConfirmation: Short confirmation message for submitted forms (can be customized in admin tool) -->
  <add key="DefaultConfirmation" value="We have received your feedback. Thank you for your submission." />
  <!-- ***** -->
```

## **TROUBLESHOOTING**

**Symptom:** Running the FormulatorNET Configuration check you receive an error that **SQL Connection could not be established.**

**Resolution:** Click previous until you return to the [Database Connection](#) screen. Verify that the values are correct. Open *SQL Enterprise Manager* and verify that a database with the name specified in *Database Connection*'s *Database* field exists. If the database is not installed, create it manually by following the instructions under the [Manual Database Installation](#) section in this document.

---

**Symptom:** Running the FormulatorNET Configuration check you receive an error that **Test email could not be sent.**

**Resolution:** Click previous until you return to the [SMTP Connection](#) screen. Verify that the *SMTP Server* value is correct. Ensure that SMTP is enabled on the server specified. In some cases, this field may be left blank. When left blank, the application will attempt to use the default SMTP server. Verify that the default sender on the *SMTP Connection* screen is a valid email address. Verify that the email address in the "Send test email" to field on the [Diagnostics](#) screen is also correct.

---

**Symptom:** When opening the *Application Setup* Web page, [Setup Check](#) returns an error that **Web application not found or files are missing.**

**Resolution:** Click previous to return to the [Web Setup](#) screen. Verify that the directory specified in *Web App Directory* is correct. Open *Windows Explorer*, navigate to the application's root directory and verify that the *Web.Config* file exists. Return to [FormulatorNET Configuration](#) and verify that the Root Directory URL is correct. Open *IIS Manager* and verify that the Virtual Directory exists. If it does not exist, follow the instructions in the [Manual Virtual Directory Creation](#) section of this document.

---

**Symptom:** When opening the *Application Setup* Web page, [Setup Check](#) returns the following error:

**SETUP IS NOT YET COMPLETE!...Before you can use Formulator.NET you need to manually give IUSER\_COMPUTERNAME full permission to the following directories and all their subdirectories and files.**

**Resolution:** See the [Application Setup \(Web page\)](#) section of this document and verify that all the directories listed there have given the *IUSR\_YourComputerName* account appropriate permissions.