Summary

This guide provides an overview of how to use webforms on the Social Ecology websites.
Note: Please close all webforms not in use.

Create new webform

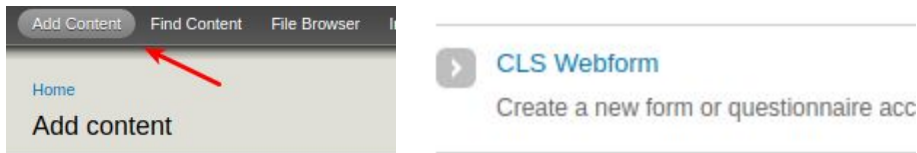To start a new webform, go to "Add Content" then choose the "Webform" content type. It may be different depending on your department, like "CLS Webform" in this case for the Criminology, Law and Society department website.

On the first page, you can create the main title and body for your webfom. This is similar to any page. The title and body here will be shown at the top of your webform. After filling out the title and body, be sure to click the save button at the bottom.
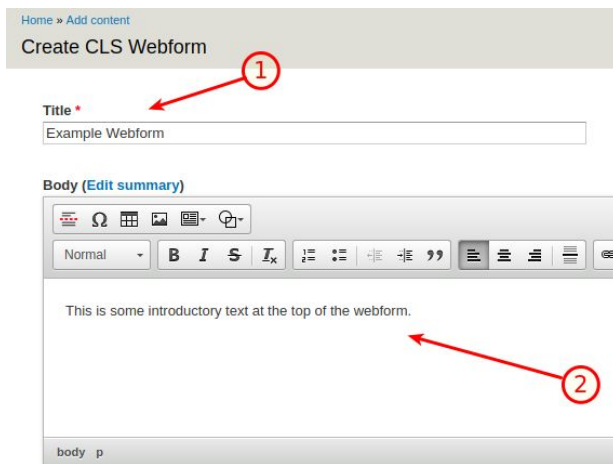
Adding Form Components

After saving your new webform, then you'll be presented with the form components screen. Here you can add new form components such as name, email, and other fields that people can fill out on your form.

There are 12 different types of form components. The most commonly used form components include E-mail and Textfield. To start let's add the form components for a typical RSVP form. We will include the form components Name, E-mail, Phone and Number of guests. Also, should the field be required? We'll say all fields are required except number of guests.

We will use the following form components for this RSVP form:

1. Name, Type = Textfield
2. E-mail, Type = E-mail
3. Phone, Type = Textfield
4. Number of guests, Type = Number

So, let's add the first field "Name". You should fill out the label, type, check the required box then click the button "Add".

LABEL	FORM KEY	TYPE	VALUE	REQUIRED	OPERATIONS
No Components, add a component below.					
⊹ Name		Textfield ▾		✔	Add

After clicking the "Add" button, you should then be presented with the screen where several options are available. Most notably you can also add a description for your field. It appears below the field typically and can provide additional instructions for people filling out your form. Be sure to click "Save" at the bottom of the screen once you have filled out the form component.

Home » Example Webform

Edit component: Name

VIEW

Form components   Condi

Label *

Name

This is used as a descriptive label when displaying this form element.

Form Key *

name

Enter a machine readable key for this form element. May contain only alphanumeric characters and underscores. This key form element. This value has no effect on the way data is saved, but may be helpful if doing custom form processing.

Default value

The default value of the field. Browse available tokens.

Description

Please fill out your name for the RSVP form.

Once you have added the new form component it should appear in the list of components. Next, add the other elements for the RSVP form: E-mail, Phone, Number of guests. After you are done you should see the list of form components appear as it does below.

Show row weights

LABEL	FORM KEY	TYPE	VALUE	REQUIRED	OPERATIONS		
✛ Name	name	Textfield	-	☑	Edit	Clone	Delete
✛ Email	email	E-mail	-	☑	Edit	Clone	Delete
✛ Phone	phone	Textfield	-	☑	Edit	Clone	Delete
✛ Number of guests	number_of_guests	Number	-	☐	Edit	Clone	Delete
✛ New component name		Number ▾		☐	Add		

Save

Conditionals

At the top of the list of "Form components" you'll notice there are a total of four "sub tabs" below the Webform tab which are: Form components, Conditionals, E-mails, Form settings.

VIEW   EDIT   **WEBFORM**   RESULTS

Form components   Conditionals   E-mails   Form settings

Conditionals are a more advanced topic, but when you click on the subtab it explains that: "Conditionals may be used to hide or show certain components (or entire pages!) based on the value of other components."

This means you can make basic "if .. then" statements. So you could create a hidden element like a markup field that says "That's too many!" and it will display if the number of guests is above 10, for example. If you want help using conditionals, contact us at se.computing@uci.edu and we'll be happy to provide more information.

E-mails

You can specify e-mail recipients on this subtab. This will then send the form submission to an email address. You can specify the address or use a form component value (usually email).

After clicking the Add button, then you will be presented with the settings for sending to this email address. This includes the sections:

1. E-mail Header Details: Subject, From Address, From Name
2. E-mail Template: Text of the email that will be sent, the template can be customized.

Typically we can leave these values default. If you need help customizing the e-mail template just contact se.computing@uci.edu and we would be happy to help.

After checking the settings, click "Save e-mail settings".

Form settings

The next subtab is Form settings, with the following options.

Submission Settings

1. Confirmation message: The page that will appear after people fill out and submit your form. You can edit the message here.
2. Redirection location: You can optionally redirect to a specific page instead of typing the confirmation message, or you can provide no redirect (**not recommended**) and the form just reloads after submission.
3. Total submissions limit: you can limit the number of submissions.
4. Per user submission limit: you can limit the number of submissions per logged in user.
5. Status of this form: whether or not the form is open or closed.

▾ SUBMISSION SETTINGS

Confirmation message

Switch to plain text editor

Text format Full HTML ▼

More information about text formats ❓

- Web page addresses and e-mail addresses turn into links automatically.

Message to be shown upon successful submission. If the redirection location is set to *Confirmation page* it will be shown on its own page, otherwise this displays as a message. Supports Webform token replacements. Browse available tokens.

Redirection location

◉ Confirmation page

◯ Custom URL: [   ]

◯ No redirect (reload current page)

Choose where to redirect the user upon successful submission. The *Custom URL* option supports Webform token replacements. Browse available tokens.

Total submissions limit

◯ Unlimited

◉ Limit to [   ] total submission(s) [ever   ▼]

Limit the total number of allowed submissions.

Per user submission limit

◉ Unlimited

◯ Limit each user to [   ] submission(s) [ever   ▼]

Limit the number of submissions *per user*. A user is identified by their user login if logged-in, or by their IP Address and Cookie if anonymous. Use of cookies may be modified in the global Webform settings.

Status of this form

◉ Open

◯ Closed

Closing a form prevents any further submissions by any users.

Submission Access

Determines who can access this form, typically you would just leave the default values unless you wanted to restrict it to specific user roles.

Progress Bar

You can show a progress bar at the bottom of he form, this is helpful on multi-page forms.

Preview Page

Whether or not to enable a preview page.

Advanced Settings

A few advanced settings including "Save as draft", and "Submit button label".

View the webform

Once you have completed the form, you can view your new webform. If you want to see how it would look to a user not logged in you can open a new "private" or "incognito" window by right-clicking on the tab "View" and choose to open a new window. You'll see the new webform you have created.

Example Webform

This is some introductory text at the top of the webform.

Name *

    Name*

Please fill out your name for the RSVP form.

Email *

    Email*

Phone *

    Phone*

Number of guests

    Number of guests

Start   Complete

    [ ] I'm not a robot
                          reCAPTCHA
                          Privacy - Terms

    SUBMIT

The section "I'm not a robot" is used to prevent spam submissions from internet "bots". It's a simple challenge where people will need to select some images.

Webform Results

Click on the "Results" tab, here you will find all the submissions from the people who have filled out your webform. Each submission is listed under the subtab "Submissions".

Each submission appears as an individual row, you can view or delete each submission under the operations column.

The other subtabs include:

1. **Analysis**: This page shows analysis of submitted data, such as the number of submissions per component value, calculations, and averages. Additional components may be added under the "Add analysis components" fieldset.
2. **Table**: This page shows a table with all the values of each submission.
3. **Download**: You can download all the results in excel or delimited text.
4. **Clear**: You can clear out all the results.

The most commonly used is the download subtab where you can then work with all the webform submissions in excel or some other spreadsheet software. Typically the default values can be used. Just click the Download button to begin the process. After downloading the results, it is recommended that you clear the form results by clicking on the clear subtab.

Webform Tips

1. **Be sure to close any forms you are no longer using. You can do this under "Webform > Form settings", Look for "Status of this form".**
2. **After downloading the form results, clear out the form results so only new ones will appear in your next download.**
3. **Don't rely on the webform to store the results, they may not be kept indefinitely. Any form results you want to keep should be downloaded on a regular interval.**
4. **Be careful with emails. If you send an email to a form component, like send a copy of an RSVP to a user, expect that not all will receive the email due to typos in email addresses.**

Learning More

If you would like to learn more, you can look online for more help. We are using the Drupal Webform module version 7.x-4.x.

Webform Community Documentation
https://www.drupal.org/documentation/modules/webform

Webform Tutorials
https://www.drupal.org/node/2834425

Drupal Webforms - Basic
https://computing.artsci.wustl.edu/help/web/create-webform-drupal-7

Getting Help

Please feel free to contact us with any other questions about how to use webforms and getting any other assistance with your Social Ecology website.

Email: se.computing@uci.edu
Phone: (949) 824-8202
Website: https://computing.soceco.uci.edu