Webforms Digital Commons Platform Training

The Digital Commons Webform module was updated in October 2016. This document explains the new functionality that will allow you to make your webforms more engaging and intuitive.

Tips to Developing your Webforms

You now have the ability to make complex forms using conditional logic (if-then statements) to your online forms. That means if the user responds to a question in a certain way, then they will either see extra or fewer form questions.

- Write or sketch out your webform before you even begin to build it. If using conditional logic, specify the if and then portions.
- Also, if using conditional logic, write out in plain English what you want it to do. If you are creating the form for another person, get the full functionality clear on paper before you begin building.
- Test out the new form. If you’re not sure whether site visitors will understand the form, try it out on your spouse, your mother, and/or your neighbor (not a coworker who already knows what you’re trying to do).

New Webform Features

Here are four new functionalities:

- **Form Components** – Adding fields and list sets to create your webforms.
- **Tokens** – Easily customize your email and webform submissions with information gathered from the user form.
- **Email formatting** – we have added ability to custom email formatting so it doesn’t appear all in one line or out of sorts.
- **Conditional logic** - allow you to display or hidden information based on user-choices.

Form Components

The following form components have newly added features.
**Date Field**

With the date field you can allow users to add dates. Previously, the date field always contained day, month and year. You are now able to customize the date to hide some of these fields. (For example, if you want to capture someone’s birthday, but not their birth year, you can simply get the month and day of their birthday.) You can hide either the month/day or month/year.

To only display the month and year, you would click the Day checkbox to hide it. To display only the year, hide the day and month. (Be aware, the month cannot be hidden by itself, since it would not be logical to gather a day and year without the month.)

**Spanning Date**

To present the site visitor with a span of dates to choose from, use the Validation area of the webform.

For example, to display the 10 prior to present and 5 years in the future, enter -10 for the start date and +5 for the end date. A site visitor would be presented with the date choices of 2006 to 2021 if using the form in 2016, and 2007 to 2022 in 2017.
Textfields

The most commonly used field in a webform is the Text field. The width of the field is now configurable. A first and last name can be added to the User Feedback form using text field, and be appropriately sized, rather than spanning the entire page.

To control the number of characters the site visitor can enter, use the max length field under Validation. To control the width of the field on the page, use the width field under Display.
Email Features

Sending form submissions in email to individuals or to groups

Form owners should receive emails for each form submission. You can add/modify the form to send an email either to a group of people or to individuals by adding them in the blank address field then click the Add button.

Disabling an email from a user or group.

In order to disable sending a notification to a user, follow these steps.

1. Decide which user you want to disable.
2. Under the operations heading above, click the Edit link.
3. Near the top of the page, click the check box named **Enabled sending** and uncheck it then click the **Save e-mail settings** button.

4. You will be taken back to the list of email users and the user you disabled should no longer have a checkbox next to it.

**Removing a user from a group**

A group has more than user included in the email field separated by a comma. Here is an example of a group.

1. Decide which user you want to remove from the group. In this example, we will remove Julia Franks.
2. Under the operations heading above, click the **Edit** link.
3. In the custom label you will find all of the users. Remove Julia Franks email address, then click the **Save e-mail settings** button.
4. You will be taken back to the list of email users and the email for Julia Franks should no longer be in the list.

**Customizing the email template**

Drupal generates email for each form submission. A confirmation email can be sent to the site visitor and can also be sent to the website manager(s).

For both of these kinds of email, you can use the Email Template to format the email that is sent, to make it easier to read.

While are able to most all HTML tags in the email template, the following common HTML tags can be used in the Email Template to style your user email:
Commonly used html tags for email template

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;h1&gt; - &lt;h6&gt;</td>
<td>Heading</td>
</tr>
<tr>
<td>&lt;p&gt;</td>
<td>Paragraph</td>
</tr>
<tr>
<td>&lt;i&gt;</td>
<td>Italic</td>
</tr>
<tr>
<td>&lt;b&gt;</td>
<td>Bold</td>
</tr>
<tr>
<td>&lt;ul&gt; &amp; &lt;li&gt;</td>
<td>Unordered List &amp; List Item</td>
</tr>
<tr>
<td>&lt;hr&gt;</td>
<td>Horizontal rule</td>
</tr>
</tbody>
</table>

To add an HTML tag <b> and <hr> to bold the headers, follow the example below.

**Added HTML markup**

```
<p>Good morning submission values name!!! We will mail your check for $3,000.00 to the following email address:<b>{submission.values.email}</b></p>
```

**Markup to display this sentence bolded**

**Creates a horizontal rule**

Ensure you check the “Send e-mail as HTML” so your email will include the formatting.
Site Visitor email confirmation

To ensure that the user who is filling out the form receives a confirmation email, follow these steps:

1. Under the Webform link, click the **Form components** link and go to the last field (which will be empty).
2. Place your cursor in the field and type the word **Email** or some text that will prompt the user to add their email.
3. Select the drop-down menu and select **E-mail** so that the field will check to ensure the email format is validated.
4. Since we want the user to receive a confirmation email, check the **Required** check box, then click the gray **Add** button. This will create the email field. Now we will make some configuration changes so the site visitor will receive their confirmation email.
5. Click the **Webform** link.
6. On the charcoal gray admin bar, click the **E-mails** link.
7. Select the **Component Value** radio button instead of the Address radio button (which is selected by default).
8. Select the Email (or text used to represent email) from the select dropdown, then click the gray Add button. This will take you to the Email configuration.

9. Under the Email to address heading, select Component radio button. Your email field should already be selected in the drop-down menu.
10. The default settings under each of the headings, should be acceptable.
11. Unless you need to update the Email template, click the gray Save email settings button.

Page Break

Page breaks allow you to break up very long forms into smaller subsections, as well as group related information, so it displays in a more organized manner. Combined with the use of Conditional Logic, page breaks allow you to create forms that are easy for your site visitors.

What is new? In the previous version, the only conditional logic available was built inside of the page break, which in some cases was limiting. The new version allows for more flexibility to display page based on user choices.
Select options

Aside from the text field, you will find the select options to be an important field to add to your webforms. They allow site visitors to select from a dropdown list of preset options from radio button (only one choice can be made) or checkboxes where multiple items can be selected.

**Multiple:** Enable the checkbox if you want the site visitor to be able to select more than one option.

Here is an example of the markup needed to produce the select box.

- **Options:** List of value options; note, you must enter these options using the following structure using Key pairs. One part of the option is used for the database, the other is what the user will see on the site.

Here are the results selecting the Multiple checkbox on the webforms:

- **Display > Listbox:** Displays select options as a select list box instead of as radio buttons or checkboxes; option groups (nested options) are only supported with this option
- **Display > Randomize options**: Randomizes the order of the options, causing them to display for the site visitor in a different order than was entered in the Drupal interface. This can help to minimize user bias.

**Tokens Add Personalization to Forms**

Tokens are specially formatted chunks of text that serve as placeholders for a dynamically generated value (variables). This is similar to Microsoft Word mail merge.

For example, tokens can be used to display a personalized submission message at the completion of the web form, by addressing the site visitor by name. We will accomplish this by adding their name, instead of just saying "Thank you", you can say "Thank you, Andrew Luck".

The image below is the result of using a value token translated base on the information provided by the user.
Use these steps to add a first and last name field:

1. Make sure you are logged in, go to your User Feedback Page form.
2. Click the Webform tab. The form Component field will be displayed.
3. In the Label field type First Name in the New Component Name field.
4. Under the Type heading, ensure Textfield is selected.
5. Under the Required heading check the box to make this field required, then click the Add button. You can now customize the properties of the First name field.
6. Go to the Validation heading and make sure that Required is still checked.
7. In the Maxlength field, enter any number you want. A good number is 25. The maxlength is the number of characters that will be allowed in the field.
8. Go to the Display heading and look at the Width field. The width field will determine how wide the field will appear. A good rule of thumb is to make the Maxlength and Width field the same.
9. Leave everything else as default and click the Save Component button.
10. Add the Last Name field next, by repeating steps 4-10.
11. After you have created the first and last name fields, move the first name to the top of the page and last name just below using the Drag tool highlighted, then click the Save button to maintain the field order.

12. Now under the Form key head, note the exact form key name (first_name, last_name) so you can reference need them later.
13. Under the **User Feedback** heading at the top of the page, click the **View** link to see what you have created.

![User Feedback Form](image)

**Applying Form Key to the token variables**

Now that you have added some fields to work with, you can reference them using tokens.

1. On the dark grey bar under the User Feedback heading, click the **Form settings** link. You will see the Submission settings page.
2. Just above the Redirection location heading, toward the right of the page, click the **Browse available tokens** link. This will display the Available tokens window.
3. Since we want to display the first and last name on the Confirmation Screen, we will click the **Submission** toggle to expand the options.

4. We want to display the submission values on the confirmation screen when the submit button is clicked, so we will copy the token value `[submission:values:?]` two times between so it reads “Thank you [submission:values:?] [submission:values:?] for your feedback.”

![Screen shot](image)

**Note:** You can move your cursor over the Available Token window to move it so you can paste the token information.

5. Once you have copied the token in the confirmation message window, close the Available token window by clicking the box on the right side of the window with the X in it.

6. On the Confirmation message WYSIWYG field, add in the the token values that you copied. For reference here they are: `first_name`, `last_name`. To do this, replace the question mark (?) in the `[submission:values:?]` value with first name, then repeat the same step in the second token using last name, so that it reads: [submission:values:first_name] [submission:values:last_name].

![Screen shot](image)

7. Click the blue **Save Configuration** button at the bottom of the page.
8. This completes the configuration of the confirmation screen. **Note:** The Emails setting has not yet been configured.

9. To test the confirmation screen, click the View link on the forms Component screen to view the webform.

10. Type in your first and last name, then click the Send Feedback button. You should see a screen that displays your name.

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**Conditional logic**

One of the most important updates was the ability to use conditional logic. Here are a few new benefits of using conditional logic.

**What is conditional logic?**

Conditional logic allows you to show and hide fields or sections of your web form based on a user’s actions. It is a great way to keep forms compact and user-friendly, while ensuring that you gather all of the information you need.

- Create interactive forms that react to user’s actions.
- You can dynamically show, hide, or change the display
- Skip entire pages if you use multi-page forms based on user choice

For example, if a user selects “Other” from a select list of pre-defined topics, you can use conditional logic to add a “Please Specify” free entry text field. Optionally, you can make it a required field so that the user has to fill in his/her custom topic.

Conditional Rules are composed as IF <condition> THEN <action> statements. A conditional statement can have multiple IF conditions (If this and that or something else) using and/or logic to define the state. If the form state matches the IF condition(s), then all defined actions will be applied.

**Conditional logic can:**

- Conditionally show a field
- Show a section/list

Here is an example of how the conditional logic works below.

Writing the logic in plain English on paper, so you can visualize how to program it. (see image below)

IF a user selects Yes to the question “do you play football?” (logic #1, display #1), THEN show the question “what position do you play” (logic #2, display #2).
Creating a Multi-page webform

Multi-step or multi-page webform pages are really good to break up long webforms. It does take a little planning though (a lot of planning) if it is a long form), since you will need to group the information for each page and order each page appropriately if you are integrating conditional logic. With that said, done properly you can bypass certain pages altogether based on user choices. The biggest benefit is the user will not have to think about what questions they should answer and not be subjected to reading a lot of side notes that are usually accompanying with long forms that do not use any type of conditional.

Here is an example of a simple webform layout that has been developed that routes a user based on where they participate in tailgating.
Adding necessary conditional logic

In the following image below, there are two pieces of logic in plain words:

Logic #1 - says that if the user chooses Yes on page 1 of the webform then skip page two and go to page #3 to answer the next set of questions. If the user answers No, the webform simply goes to the second page. No logic was needed.

Logic #2 - asks what activities the user participates. If they choose GrillMaster as an option, then the Cooking item question appears just below for the user to answer. If they did not choose Grill Master the Cooking item question would not appear for the user to respond.
You can make your webform more complex in term of conditional logic. An extremely useful feature of the webforms is it will not let you save the webform if the logic does not validate. In some instances, the conditional logic will validate but not work. This can occur mainly in multi-page webform when you are attempting to skip pages.

**In review:**

- **Plan ahead.** For long webforms, sketch all of the questions on a paper in an organized manner. The reason is if your webform become too long, you may need to integrate page breaks.
- **Progress bars.** In general progress bars are excellent feature to use when you have multi-page webforms. It provides a cue for the users of what is to come by adding the page title on top of the page.
To enable to display the progress bar follow these steps:

1. Click **Webform** located just below the webform title
2. Click **Form settings** located on the grey menu bar, then scroll to the bottom of the document and click the **Progress bar** toggle.
3. Check the **Show progress bar** checkbox, then click the blue **Save Configuration** button at the bottom of the page.

Beware though, if you are using logic that skips pages based a user-decision, then do not use them because, this may cause some confusion in users because they may think the form is broken or they make skipped. Another tip is to keep the title short because it doesn’t look good on the webpage and it doesn’t wrap well.

- **Make sure the Preview page is enabled.** This provides users the ability to review the information prior to pressing the submit button.
To display the Preview page on the webform, follow these steps:

1. Click **Webform** located just below the webform title
2. Click **Form settings** located on the grey menu bar, then scroll to the bottom of the document and click the **Preview page** toggle.
3. Check the **Enable preview page** checkbox, then click the blue **Save Configuration** button at the bottom of the page.

   **Note:** Just below on the Preview page title, you can add your own verbiage there as well. Keep it short and sweet.

- **For administrators only, make sure HTML mail system is selected.** This will allow the submission results to be sent in HTML format and will allow you to add other customized tags to the email template.

To verify:

1. On the black administrator toolbar, click **Configuration** link.
2. Under the Content Author heading, click the Webform settings link.
3. Scroll down toward bottom of the page and click the **HTML mail system** checkbox. Another option will appear (hey, they used conditional logic!!)
4. Under the Format heading, click the **HTML** radio button, then click the blue **Save configuration** button.

   ![Use Reply-To header](image)
   ![Ensure HTML is checked, so the email will be sent in HTML format.](image)
   ![Progress bar](image)

That’s it!! If you have any questions or have questions, feel free to reach out to us.