Webforms on a Drupal 7 Website

A form is a document used to gather specific information from a person. A webform is simply a web page, built to allow the web-reader to enter data and is programmed to distribute that data for processing.

It is important to have a basic understanding of webforms/html.

Our Drupal websites have modules built into them to create forms to gather information and to distribute it according to your instructions. However a basic understanding of webforms, form fields, etc. will make form creation easier to understand and implement

Obtain Form Manager Access.
Before you create any forms on a Drupal site, you must first have access as a Form Manager. If you have not done so, contact asccomm@osu.edu for Form Manager training and access rights.

If, after reading this document, you would like help or have further questions about webforms, please contact Jody Croley Jones, croley.1@osu.edu, 614-247-7071.
Basic Steps
(See detailed explanation of these steps on additional pages.)

- Plan Ahead: Determine what you need in a form and create a Mockup illustrating the form purpose and requirements.
- Open form page Title (and optional form introduction).
- Add form fields
- Determine Sequence of the form fields
- Determine what happen when the form is submitted
- Send email to designated receiver(s)
- Email / Display response to the web-reader
- Determine and set up who has Results Access for the form
- Access Results

Form Sample

Optional text description that, if form is multi-page, will appear on every page. Page body (optional)

<table>
<thead>
<tr>
<th>Personal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name: *</td>
</tr>
<tr>
<td>Last Name: *</td>
</tr>
<tr>
<td>Email Address: *</td>
</tr>
</tbody>
</table>
- * tells user that the field is Mandatory

<table>
<thead>
<tr>
<th>Address Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street Address:</td>
</tr>
<tr>
<td>City:</td>
</tr>
<tr>
<td>Columbus</td>
</tr>
<tr>
<td>Textfield w/default value = Columbus</td>
</tr>
<tr>
<td>State:</td>
</tr>
<tr>
<td><em>None</em></td>
</tr>
</tbody>
</table>
- ‘Select options’ type field using listbox

How many years have you lived in Columbus?

- Radio buttons type field w/ default selected

- 1-5
- 6-10
- >10

What type of activities do you like?

- Theater – Plays
- Theater – Musicals
- Concerts
- Author Talks
- Art Galleries

Form Creation Date:
Thursday, August 9, 2012 - 11:45am
- Disabled Textfield w/ default value
- * CAPTCHA: no challenge enabled

Submit
Plan Ahead

1. Determine information needed
   a. What is the purpose of this form?
   b. What Information is needed and/or wanted?

2. Determine types of fields
   a. One field vs two, ie: Name field vs First Name and Last Name
   b. Text vs Number field, ie: Zip Code needs to be a text field to allow for preceding zero (01275) and for hyphen (43085-6729)
   c. Text vs Date field, date field requires month, day and year, where you might need only year

3. Determine what information should be required, ie: if an email is to be returned to the Reader submitting the form, then the Email field should be required.

4. Logical Layout
   a. Place labels consistently
   b. Provide clear instructions about what information is desired. **Be explicit not subtle!**
   c. Group fields in logical manner ie: personal information, school information, parent/guardian information, classroom experience information, files needed information, etc...
   d. Naming of Field Labels and Keys
      i. Labels are the field name that your Readers will see. They need to be concise and informative so that the Readers know what information is being requested.
      ii. Keys are the names by which Drupal will know the fields. If any programming is needed, these keys need to be logical, short and useful. Use consistent keys throughout website.
         1. See examples:
            a. Fieldset (grouped information)

<table>
<thead>
<tr>
<th>Label: Personal Information</th>
<th>Label: School Information</th>
<th>Label: Parent/Guardian Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key: p_info</td>
<td>Key: s_info</td>
<td>Key: pg_info</td>
</tr>
</tbody>
</table>

b. Text fields

<table>
<thead>
<tr>
<th>Label: First Name</th>
<th>Label: Last Name</th>
<th>Label: Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key: fname</td>
<td>Key: lname</td>
<td>Key: name</td>
</tr>
<tr>
<td>Label: Address, line 1</td>
<td>Label: Address, line 2</td>
<td>Label: Zip Code</td>
</tr>
<tr>
<td>Key: address01</td>
<td>Key: address02</td>
<td>Key: zip</td>
</tr>
<tr>
<td>Label: Courses taken</td>
<td>Label: Performance Experience</td>
<td></td>
</tr>
<tr>
<td>Key: c_taken</td>
<td>Key: experience</td>
<td></td>
</tr>
</tbody>
</table>

2. Note that individual Field Keys **must** be unique. However you can use the same field key in different field sets. For Example these two name fields are uniquely named

   Personal Information: Name → p_info name
   Parent/Guardian Information: Name → pg_info name

5. Layout
   a. Where relevant, provide overall instructions that apply to the entire form. For example:
      • All fields marked “required” must be completed.
• Required fields are marked with an asterisk (*) and must be completed.
• Extra help can be found immediately after each field.
b. Fields: Select logical order, ie most personal information to most general

c. Labels
   i. Best practice is to place label on the same line as the field
      First name
   ii. When possible, include field instructions within the label of the field
      Do this: Upload your report (use .pdf format):
      instead of or in addition to: Upload your report: (use .pdf format)
   iii. Group Checkboxes & Radio Buttons within their own fieldset.
   iv. Where possible, use checkboxes or listboxes instead of Radio Buttons as Radio Buttons are less accessible when using a keyboard to move through the form

6. Determine what happens after the form is submitted.
   a. Confirmation page presented to submitter of form
   b. Is someone notified? Options include
      i. Email sent to submitter of form
      ii. Email sent to other person, email given in form
      iii. Email sent to form ‘owner’ to know that form has been submit and/or to give form results
      iv. Email sent to anyone else

7. Determine who, if anyone, should have access to form results on the website?

Now you are ready to begin the form!
Begin a new Web Form:
Select the Wrench at the upper left.

This brings up the menu, on the left side of your browser window. Select the menu item **Add Content** and then **Webform**.

Add the form page Title
Fill in the Title field (note, this field is required, as is indicated by the red asterisk *)

Optionally, use the Body field for static information, introducing the form. If the form is to be a multi-part, multi-page form, only fill in the Body field *if* you have content that is to appear on *every page* of the multi-page form. Do however, provide overall instructions that apply to the entire form.

**SAVE** the form. Next the tabs below will appear; make sure you are on the Webform tab.
Add form fields

Make sure you are on the Webform tab, in Form components.

Next read this entire section to insure an understanding of the different types of fields.

Now create some fields...

Most fields are created in the same manner. To create one:

- type in a Label;
- select field Type.
  note that you are able to make a field Mandatory by simply putting a check in the checkbox under Mandatory. If mandatory, the user is required to supply a response to this field before they are able to submit the form.
- select the Add button.

After adding the field, a form for the creation of the chosen type of field will appear. Your Label will appear as the Label and a version of it will appear as the Field Key. Both of these are required fields. Additional fields will also appear, as described below, in order to create each field for the form.

Label: descriptive label used to inform Reader what information is needed
Field Key: Keys are the names by which Drupal will know the fields. If any programming is needed, these keys need to be logical, short and useful. Use consistent keys throughout website. See Plan Ahead section on page 4
Default value: text put into this field will then appear as the fields value when the form is used
Description field: a rich text field used as help for the user when using the form.

Additional Validation items:
Mandatory: use this option if the user must enter a value.
(This will be checked if Mandatory was checked on the previous page.)
Unique: selecting this insures that values entered in this field will be unique. The same value may not be used twice.
Maxlength: sets the maximum number of characters that the user can enter for this field.

Additional Display items:
Width: sets the width of the appearance of the field on the form. Leaving it blank makes it appear at a default size.
Label placed to the left of the textfield: places input text to the left of the field on the form. ie: $, #, -
Label placed to the right of the textfield: places input text to the right of the field on the form. ie: lbs, %
Label display: allows you to select where the label of the field (given at the top) will appear in relation to the field.
Disabled: a checkbox that when checked will make the field unable to be changed by the user. This is frequently used for setting an unchangeable default value. ie: date
Private: a checkbox that when checked makes this field hidden to the user, but viewable by those who have access to the results of the form.
Types of Fields (in alphabetical order)

<table>
<thead>
<tr>
<th>Field Name and information</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
<td></td>
</tr>
<tr>
<td>The Date field allows for user to input a date.</td>
<td></td>
</tr>
<tr>
<td><strong>Additional Display items:</strong></td>
<td></td>
</tr>
<tr>
<td>Enable popup calendar: Lets user see and use a calendar to input date.</td>
<td></td>
</tr>
<tr>
<td>Use a textfield for year: Lets user type in year. This is a good option to use when the variety of years that may be selected is either great in number or erratic.</td>
<td></td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td></td>
</tr>
<tr>
<td>The Email field allows for the user to input an email. It appears and operates similar to the Textfield, but when used, it validates the field insuring that a correctly format email address has been entered.</td>
<td></td>
</tr>
<tr>
<td><strong>Fieldset</strong></td>
<td></td>
</tr>
<tr>
<td>In order to be accessible, large blocks of information should be organized into more manageable groups where natural and appropriate. A Fieldset is used to group several different fields together into these common group. For example, you may have a field for First Name, a field for Middle Name and a field for Last Name. To put these together in one group you would create a Fieldset called Name and add them to this fieldset.</td>
<td></td>
</tr>
<tr>
<td><strong>Additional field creation items:</strong></td>
<td></td>
</tr>
<tr>
<td>Description field: a rich text field used as help for the user when using the form.</td>
<td></td>
</tr>
<tr>
<td><strong>Additional Display items:</strong></td>
<td></td>
</tr>
<tr>
<td>Collapsible: a checkbox that when checked will allows the user to close the fieldset.</td>
<td></td>
</tr>
<tr>
<td>Collapsed by Default: a checkbox that when checked opens the form with the fieldset already collapsed.</td>
<td></td>
</tr>
<tr>
<td>Private: a checkbox that when checked makes this field hidden to the user, but viewable by those who have access to the results of the form.</td>
<td></td>
</tr>
<tr>
<td>Please note: There also exist a display option of Hide label. We do NOT use this option as the Fieldset must display a label in order to be accessible.</td>
<td></td>
</tr>
</tbody>
</table>

When done with your text, simply use the Save component button to add it to your form.

Once the fieldset has been created, then move fields into the fieldset by placing the mouse cursor over the crosshair symbol to the left of the field name. Hold down the mouse button and drag and drop the fields into place under and to the right of the fieldset name.
**Field Name and information** | **Sample**
---|---

**File**
The field allows the reader to upload a file into the form.

**Additional Display Items:**
- **Upload destination:** Public vs Private, use private to insure that no one can, except those that you designate, can view the files.
- **Upload directory:** Allows designation of a directory for files. Now only useful for ASC Tech, it may help to re-locate files in future years.
- **Max upload size:** give the largest size file the user will be able to upload. This may be important when you start downloading the files. For text files, 50-100K will work, videos and images will need to be larger.
- **Allowed file extensions:** the types of files that are allowed to be uploaded, check the ones wanted to select the file types that the owner can read

**Grid**
A Grid field may be used for any type of a multiple choice question in which only one choice may be selected at one time. It is intended to be used for multiple choice questions that all share the same choice of responses. However it may be useful to present a single question in a horizontal rather than a vertical format.

**Rate Room features**

<table>
<thead>
<tr>
<th></th>
<th>POOR</th>
<th>AVERAGE</th>
<th>GOOD</th>
<th>EXCELLENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acoustics</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Heating/Cooling</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aesthetics</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Additional Display items:**
- **Randomize Options:** changes order options are presented for each person using the form.
- **Randomize Questions:** changes order of questions for each person using the form.

**Additional Options items:**
The actual Options. These are the possible responses from the reader. ie: a scale of 1-5.
The actual Questions or sentences to be evaluated

**key-value pairs**
For each of the above Option Fields, in the Options tab there is a checkbox setting to Customize Keys.

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When used, it allows the Reader to view one set of options (the Value) that may be explanatory or lengthy, while a shortened version with the submission. Once selected the options will look like this:

**Options**

<table>
<thead>
<tr>
<th>DEFAULT</th>
<th>KEY</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>one</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>two</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>three</td>
</tr>
</tbody>
</table>

---

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**Hidden**
The only purpose of the Hidden field is to store information on the form that will then be stored in the results – but that is never seen by any web-reader. An example might be to include the form owners name or website name.

**Markup**
It is possible to create a field that, when making a multi-page form, can be used to present text on only one of the pages. Additionally, you can use a Markup field if you have a single question with many parts and you want to add commentary for each part.

**Additional field creation fields:**
- **Value field:** a rich text box for description, instructions, disclaimer, etc.

When done with your text, simply use the **Save** component button to add it to your form.

**Number**
A Number field is only used when the reader is to provide an actual number. Note that a phone number and a zip code should be textfields because of hyphens.

**Additional Display items:**
- Decimal Places: Specifies maximum number of digits to the right of the decimal.
- Thousands separator: What character should be used to separate thousands.
- Decimal point: What character is to be used as the decimal mark.

**Additional Validation items:**
- Integer: Checkbox to allow for integer only entry.
- Minimum: Minimum (smallest) numeric value that can be entered.
- Maximum: Maximum (largest) numeric value that can be entered.
- Step: Limit options between numbers to a particular step in value.

**Additional Analysis items:**
- Exclude zero: Eliminates null or empty responses when calculating avg or sum.

**Select options**
Use the Select options type of field for any type of multiple choice selections question. This field is used to create radio buttons (the default), checkboxes (for times when more than one selection can be chosen) and select lists.

**Additional field creation items:**
- Default value: gives a selection that will be the value if none other is input.
- Description: a rich text field used as help for the user when using the form.
- Options: this is one of the most important entries for this field. On separate lines, a pair of words must be entered. The first item in the pair will be the “key” by which the database will remember the value and the second item in the pair will be the verbiage that the user views in the form. For example a pair might contain OH|Ohio. The database will retain the OH, but the Ohio is what the user will see as a selection.
- Multiple: a checkbox that when checked indicates that more than one option may be selected by the user and thus will change the choices to checkboxes.

**Additional Display items:**
- Listbox: a checkbox that when checked will display the options in a listbox rather than as radio buttons or checkboxes.
- Randomize options: causes the options in a random order when the form is displayed.
- Label display: allows you to select where the label of the field (given at the top) will appear in relation to the field.
- Private: checking this box makes this field hidden to the user, but viewable by those who have access to the results of the form.

The default type of Select list is Radio buttons.

**How many years?**
- 1-5
- 6-10
- >10

Checkboxes are created when the Display option for Multiple is selected.

**What type of activities do you like?**
- Theater - Plays
- Theater - Musicals
- Concerts
- Author Talks
- Art Galleries

When, under the Display tab, Listbox is selected, display changes from Radios buttons to a list box.

**Year**
- January

The Markup field appears as text with a title, as shown above.
### Field Name and information

<table>
<thead>
<tr>
<th><strong>Textarea</strong></th>
<th><strong>Sample</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A Textarea field is used when the user is asked to provide a long answer.</td>
<td>Comments</td>
</tr>
<tr>
<td><strong>Additional Display items:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Rows:</strong> Sets the height of the textbox.</td>
<td></td>
</tr>
<tr>
<td><strong>Columns:</strong> Sets the width of the textbox.</td>
<td></td>
</tr>
<tr>
<td><strong>Hide label:</strong> a checkbox that when checked hides the label of the fieldset.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Textarea</strong></th>
<th><strong>Sample</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A Textarea field is used when the user is asked to provide a long answer.</td>
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</tr>
<tr>
<td><strong>Additional Display items:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Rows:</strong> Sets the height of the textbox.</td>
<td></td>
</tr>
<tr>
<td><strong>Columns:</strong> Sets the width of the textbox.</td>
<td></td>
</tr>
<tr>
<td><strong>Hide label:</strong> a checkbox that when checked hides the label of the fieldset.</td>
<td></td>
</tr>
</tbody>
</table>

### Textfield

A Text field is used when the user is asked to provide a short answer.

<table>
<thead>
<tr>
<th><strong>Sample</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>City</strong>: a required Textfield with default value of Columbus.</td>
</tr>
</tbody>
</table>

### Time

The Time field allows the reader to input a time. To have the current time displayed as the default, type ‘now’ into the Default value.

<table>
<thead>
<tr>
<th><strong>Sample</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Time of your arrival:</td>
</tr>
<tr>
<td>2:40 am</td>
</tr>
</tbody>
</table>
Determine Sequence of the form fields

The sequence of fields is important to insure that the form is both easy to use and may easily be accessed by a screen reader. For a screen reader this means that the ‘tab order’ must be set properly. Fortunately, in Drupal, the order is the same as the order in which the fields are displayed. So make sure that the fields are displayed in a logical fashion. For example display Name and address as:

Wrong

Wrong

Right

Save the form when you have completed it.

Determine what happens when the form is submitted

Once the web Reader selects the ‘Submit’ button, the data from the form is automatically saved to Drupal. Then, typically, the Reader is sent to a Confirmation Page, and emails may be sent. Each of these items can be configured.

Make sure you are on the Webform tab, in Form settings.

a. If the person who submits the form is then to see a Confirmation message, which is recommended, then add text in the Confirmation message field. This message may contain thanks, further instructions, contact information, etc.

- Using the Confirmation message rich text field, create a message for the reader. It may simply say Thank you; or contain instructions as to what to do next; or give options to further explore your website.
- Redirection location. By default it is set to Confirmation page and will use the message you input above. Other choices give the ability to redirect to a different page; use relative location if an internal page is used, or absolute location is an external location is used. No redirect may also be chosen. However this simply reloads the last page of the form and thus may cause great confusion.
- Total submissions limit is set next. If you only want to receive a limited number of submissions (as in you can only admit 10 to a class), set the limit. Otherwise leave it set at unlimited. The Per user submission limit will determine how many times the same person can submit the form. This could be useful when creating a form for a registration or an RSVP. Then you would only want one response per user or Limit each user to 1 submission ever.
• **Status** is the only other necessary items to consider. By default the form is Open. When Closed, no submissions may be made and only the text from the Edit tab Body field will visible. So you may want to revisit that tab and make adjustments to that text when you close a form.

• **Submission Access** limits who can use and submit the form. This access is controlled by the Roles held by the visiting Reader. Typically the checkbox by anonymous user and authenticated user (someone who is logged into the site) are checked by default. You can also limit it to an authenticate user in a specific (previously defined) role.

Make sure, when you are done with these options, that you select the **Save configuration** button to continue.

b. **Send email to designated receiver(s)**

Select Emails at the top-right of the Webform page. Enter email address of recipient and select Add. You can send the *same* email to multiple email addresses by adding them together in this field, separated by commas.

This will open up a form (see below) to customize email results for this recipient. Read and select each of the necessary options.
Also set the E-mail template

An e-mail template can customize the display of e-mails.

Within this template, you set what type of information will be received by the results recipient. It is suggested that you accept the template as given EXCEPT, do not keep the Submitted by user statement as it will by default be “Anonymour.” Also do not keep the final sentence “The results of this submission may be viewed at: %submission_url” if the email recipient is not to be given Results Access as well.

Save the form. Remember that if the same email is to go to different people, add their email address in the initial Email To field, separating the emails with a comma. However you may set up multiple emails, using different or customized responses for each person that needs to receive the form.

Also remember that you can send an email response to the person who submits the form as well.

Determine and set up who has Results Access for the form

Select the ACL (Access Control List) tab.

On the form provided, type in the Username: of the person to whom Results Access is to be given. The username is their OSU email address (name.#@osu.edu)

In order to be able to access results, the web-reader must also be set up in the proper role. Thus, a request from the Web Content Owner or Manager must be sent to asccomm@osu.edu asking for that person to receive access as a Form Viewer. This only need be requested once per person, per site.
Access Results

When access to the results has been given and the web-reader is logged into the site, a new Results tab will now appear for the form and they can now view results in the following manner.

**Submissions**: Review one individual’s answers.

**Analysis**: Look at the overall results one question at a time.

**Table**: See the results in tabular form.

**Download**: Download the results as either a comma delimited file or as an Excel spreadsheet.

Additional Questions and Help?
Please contact Jody Croley Jones, croley.1@osu.edu, 614 247-7071.