

***WEBFORM:***

***THERE IS THIS***

***FOR THAT***

# HELLO!



Hi, my name is Jacob Rockowitz.

- × I am known as jrockowitz on the web.
- × I am a Drupal developer and software architect.
- × I built and maintain the Webform module for Drupal 8.



***THIS IS***  
***NOT ABOUT...***

## ***THIS IS NOT ABOUT...***

- × **The history** of the Webform module
- × **Installing** the Webform module
- × **Alternatives** to the Webform module
- × **Future** of the Webform module
- × **Theming** and styling webforms
- × **Managing** webform submissions

***THIS IS ABOUT***

***BUILDING***



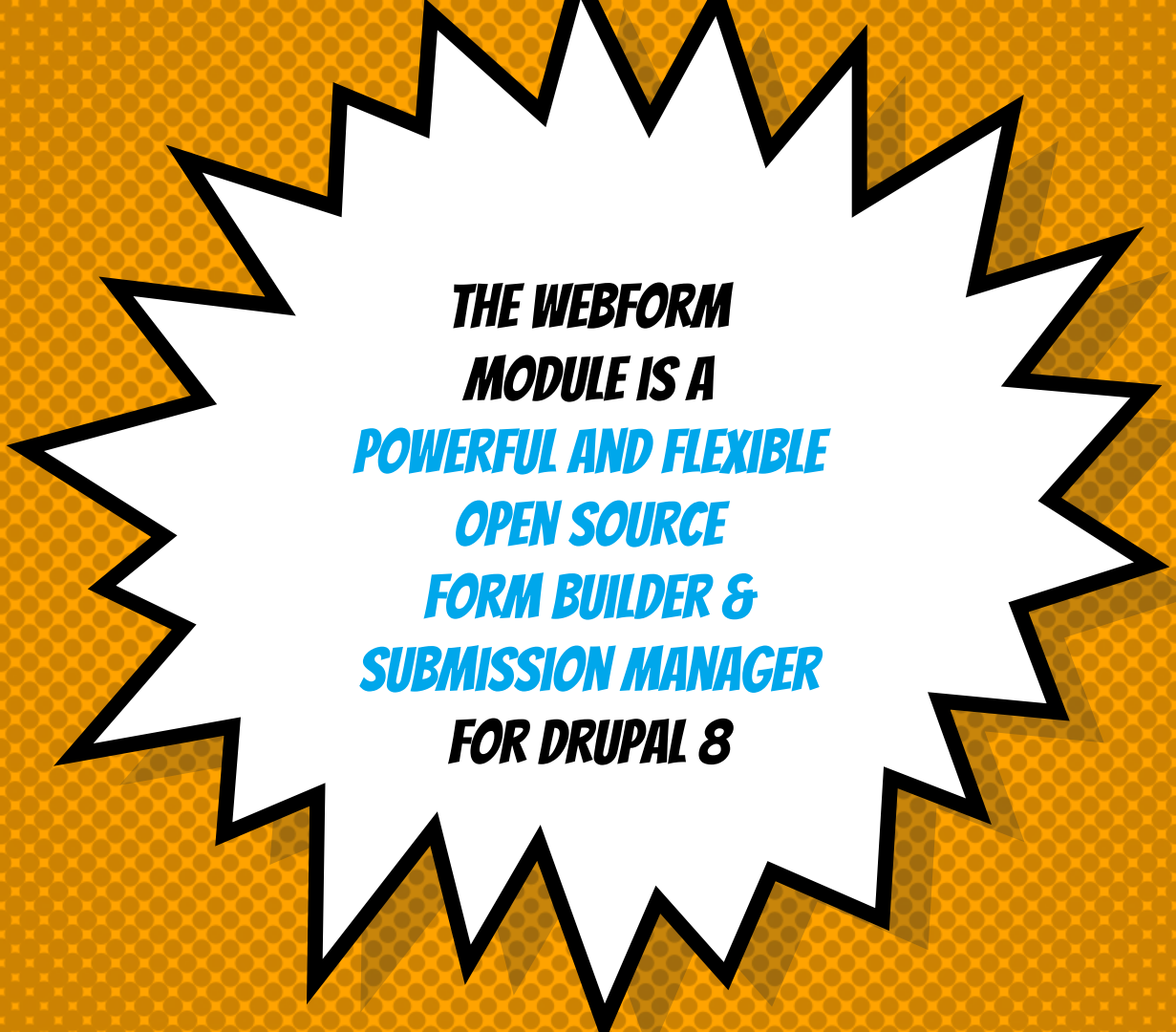
***AWESOME FORMS***



***HOW DO YOU  
BUILD FORMS  
IN DRUPAL?***



***THERE IS THE  
WEBFORM MODULE  
FOR THAT***



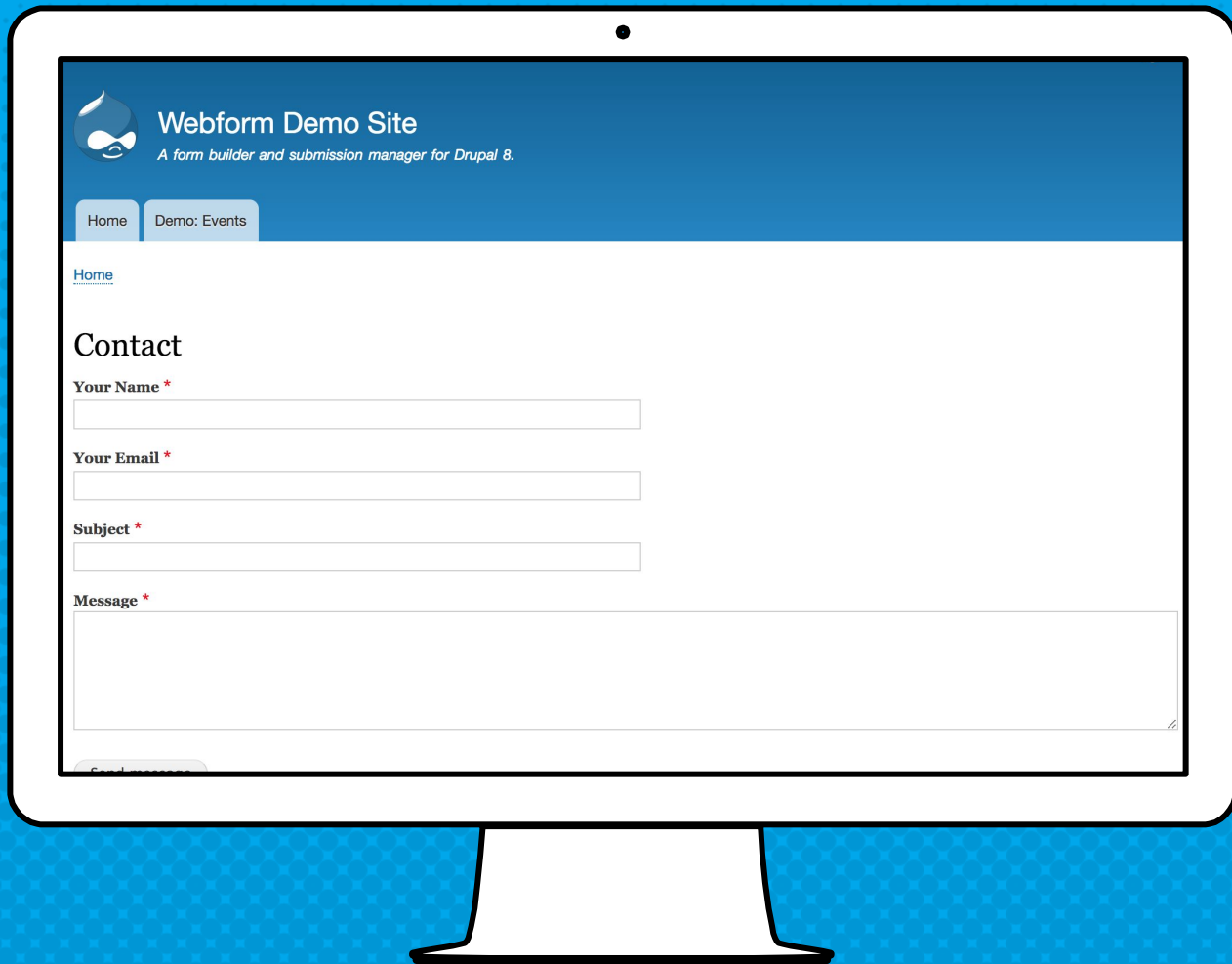
**THE WEBFORM  
MODULE IS A  
POWERFUL AND FLEXIBLE  
OPEN SOURCE  
FORM BUILDER &  
SUBMISSION MANAGER  
FOR DRUPAL 8**



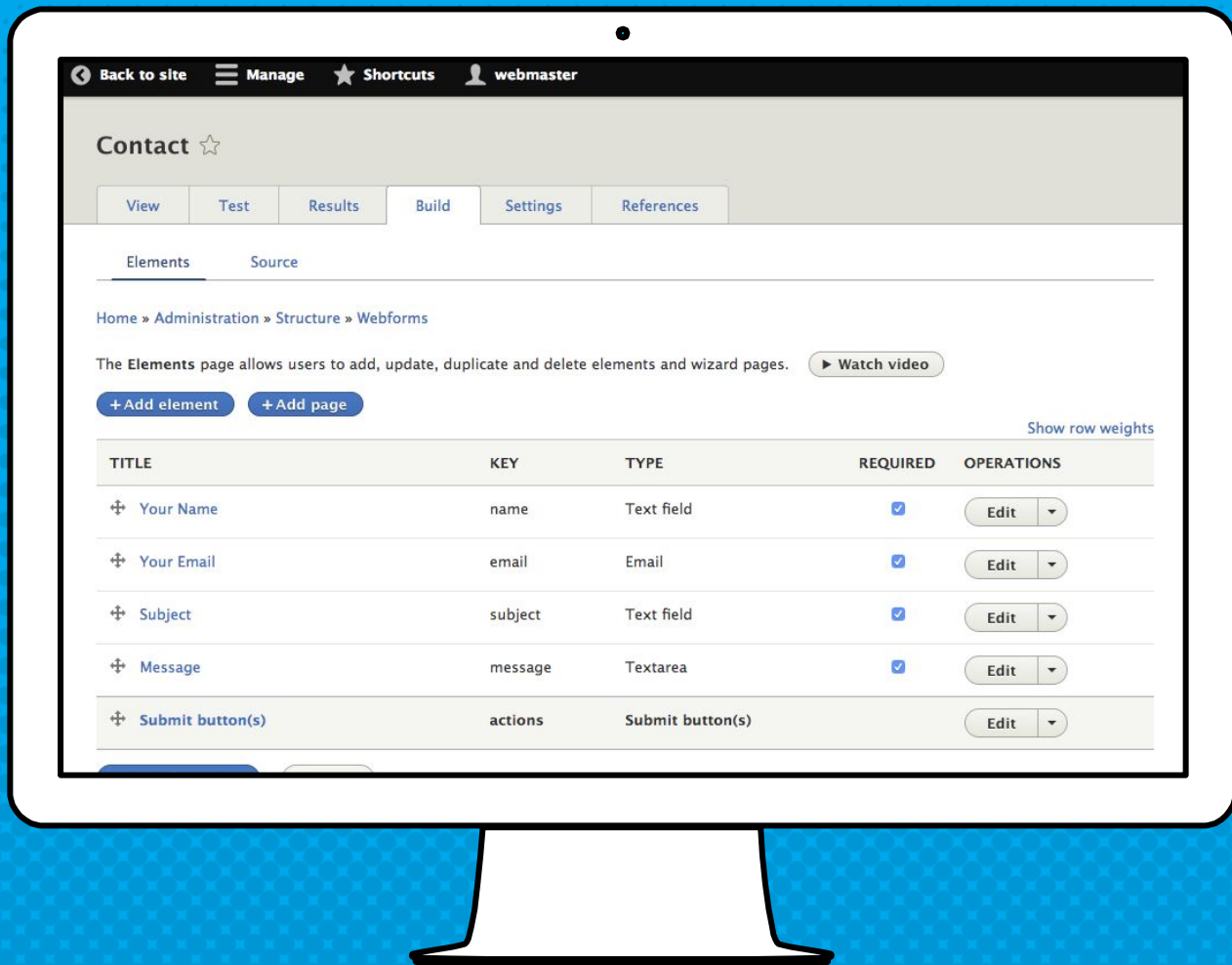
***IT PROVIDES ALL THE  
FEATURES EXPECTED  
FROM AN ENTERPRISE  
PROPRIETARY FORM  
BUILDER...***

***...COMBINED WITH THE  
FLEXIBILITY AND  
OPENNESS OF DRUPAL***

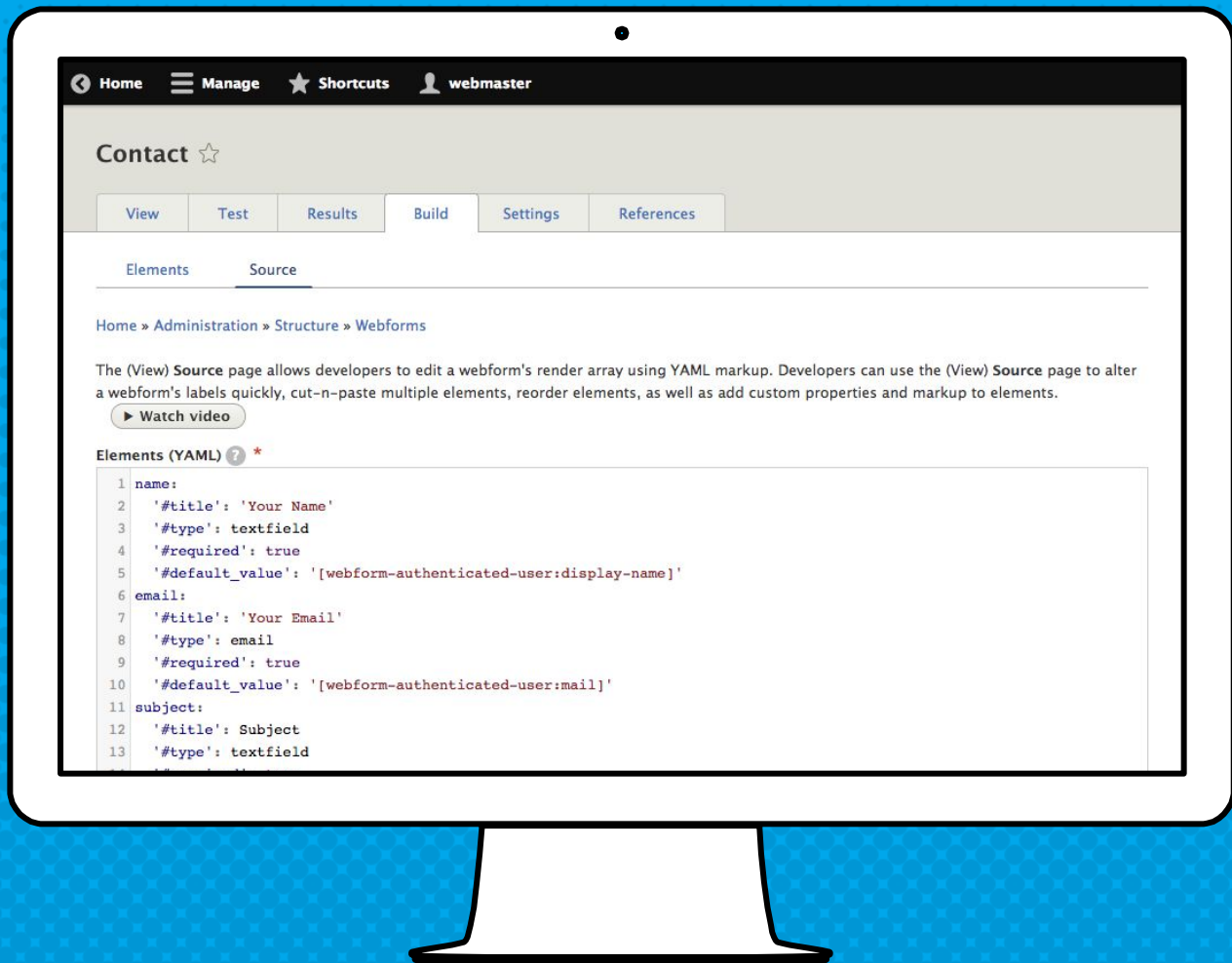
**THIS  
IS A  
WEBFORM**



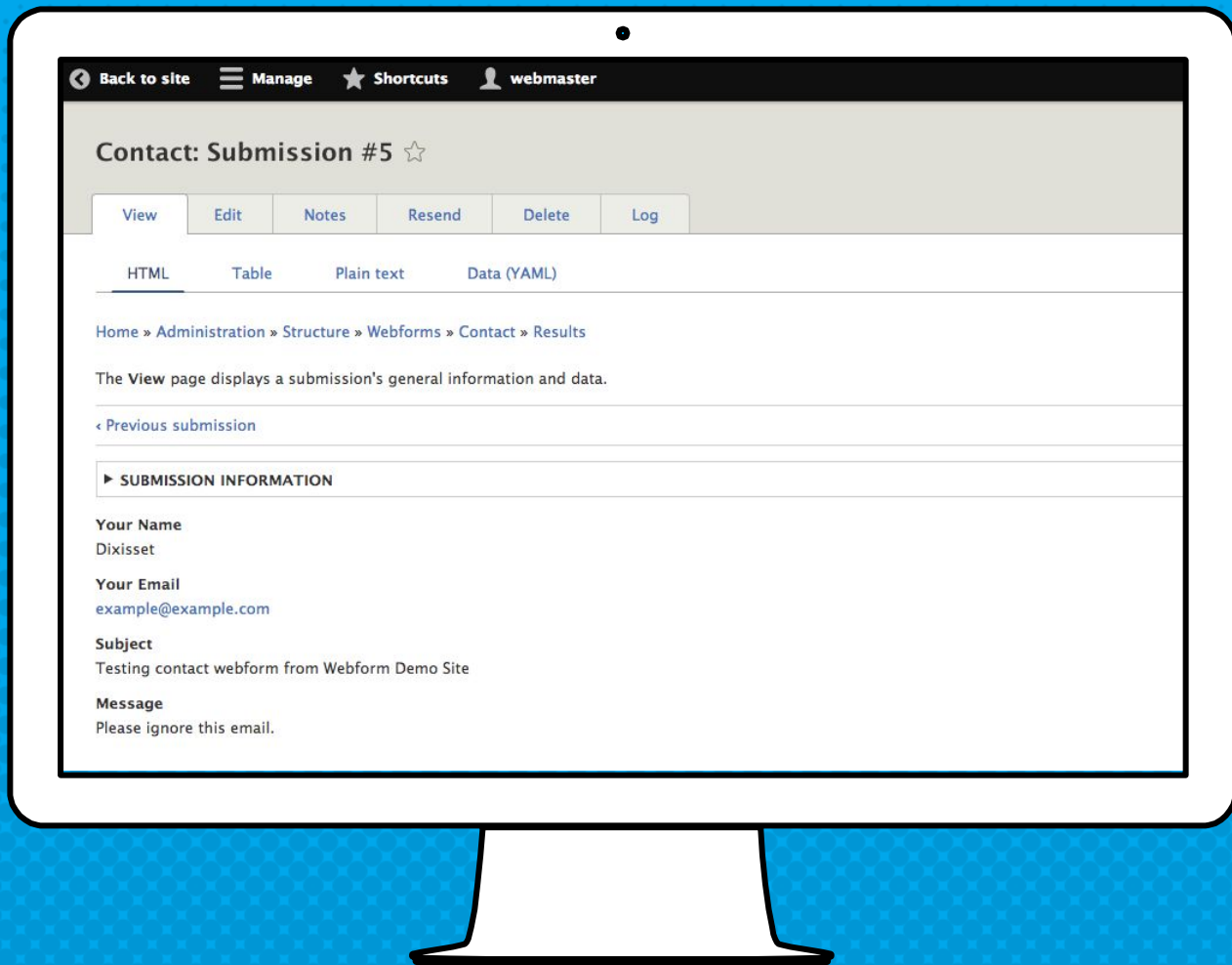
# THIS IS THE WEBFORM BUILDER



# THIS IS THE WEBFORM SOURCE (YAML) EDITOR



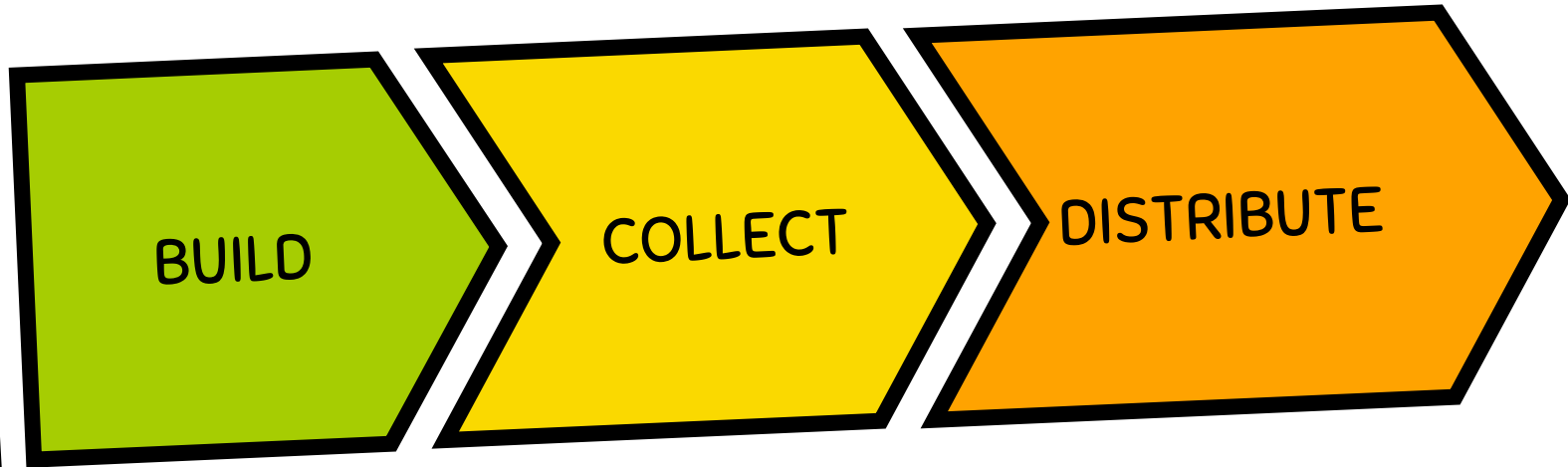
# THIS IS A WEBFORM SUBMISSION



## ***THE USE CASE...***

- × **BUILD** a form or copy a template
- × **PUBLISH** the form as a page, node, or block
- × **COLLECT** form submissions
- × **SEND** confirmations and notifications
- × **REVIEW** results online
- × **DISTRIBUTE** results as CSV or remote post

***ONCE AGAIN, THE USE CASE...***



A computer monitor with a white bezel and a black dot at the top center. The screen is dark blue and displays the text '<demo>' in a large, light blue, sans-serif font. Below it, the text 'The elevator pitch' is written in a smaller, yellow, monospace-style font. The monitor is set against a light blue background with a halftone dot pattern.

<demo>

The elevator pitch






***HOW DO YOU  
DISCOVER WHAT  
THE WEBFORM MODULE  
CAN DO?***



***THERE ARE***  
***EXAMPLES***  
***FOR THAT***

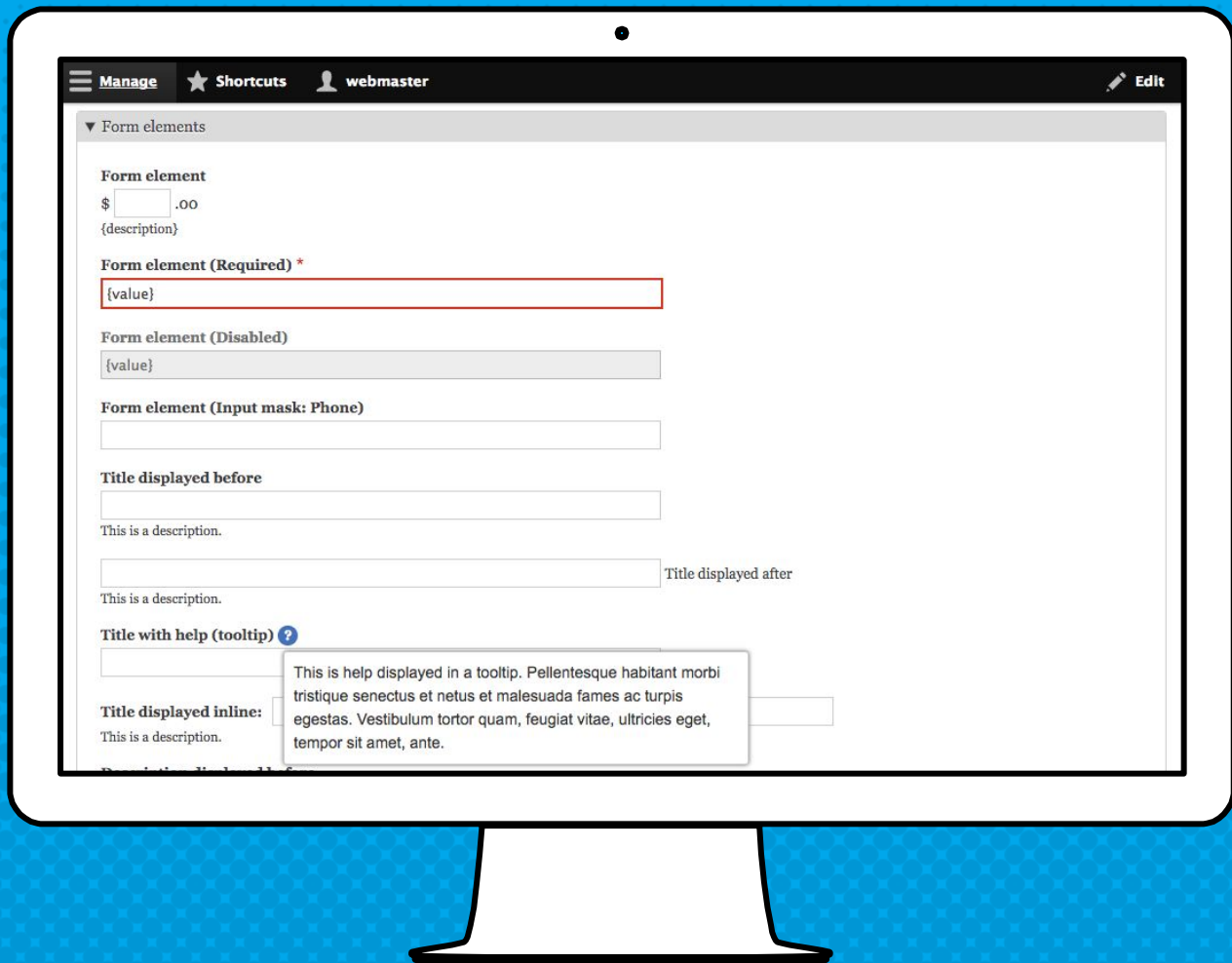


**THE WEBFORM  
MODULE PROVIDES  
EXAMPLES & DEMOS THAT  
CAN BE USED AS A  
STARTING POINT  
FOR BUILDING  
FORMS & APPLICATIONS**

## ***THERE ARE EXAMPLES & DEMOS OF...***

- × Every element type
  - × Multi-step forms (wizards)
  - × Conditional logic
  - × Flexbox layouts
- 
- × Event registration
  - × Application evaluation

**THE  
EXAMPLE  
STYLE GUIDE  
IS VERY  
HELPFUL &  
COMPLETELY  
CUSTOMIZABLE**



A computer monitor with a white bezel and a black dot at the top center. The screen is dark blue and displays the text '<demo>' in a large, light blue, sans-serif font. Below it, the text 'Learn by example' is written in a smaller, yellow, monospace font. The background behind the monitor is a light blue pattern of small, dark blue dots.

`<demo>`

Learn by example



***HOW DO  
YOU START  
BUILDING FORMS?***



***THERE ARE  
TEMPLATES  
FOR THAT***



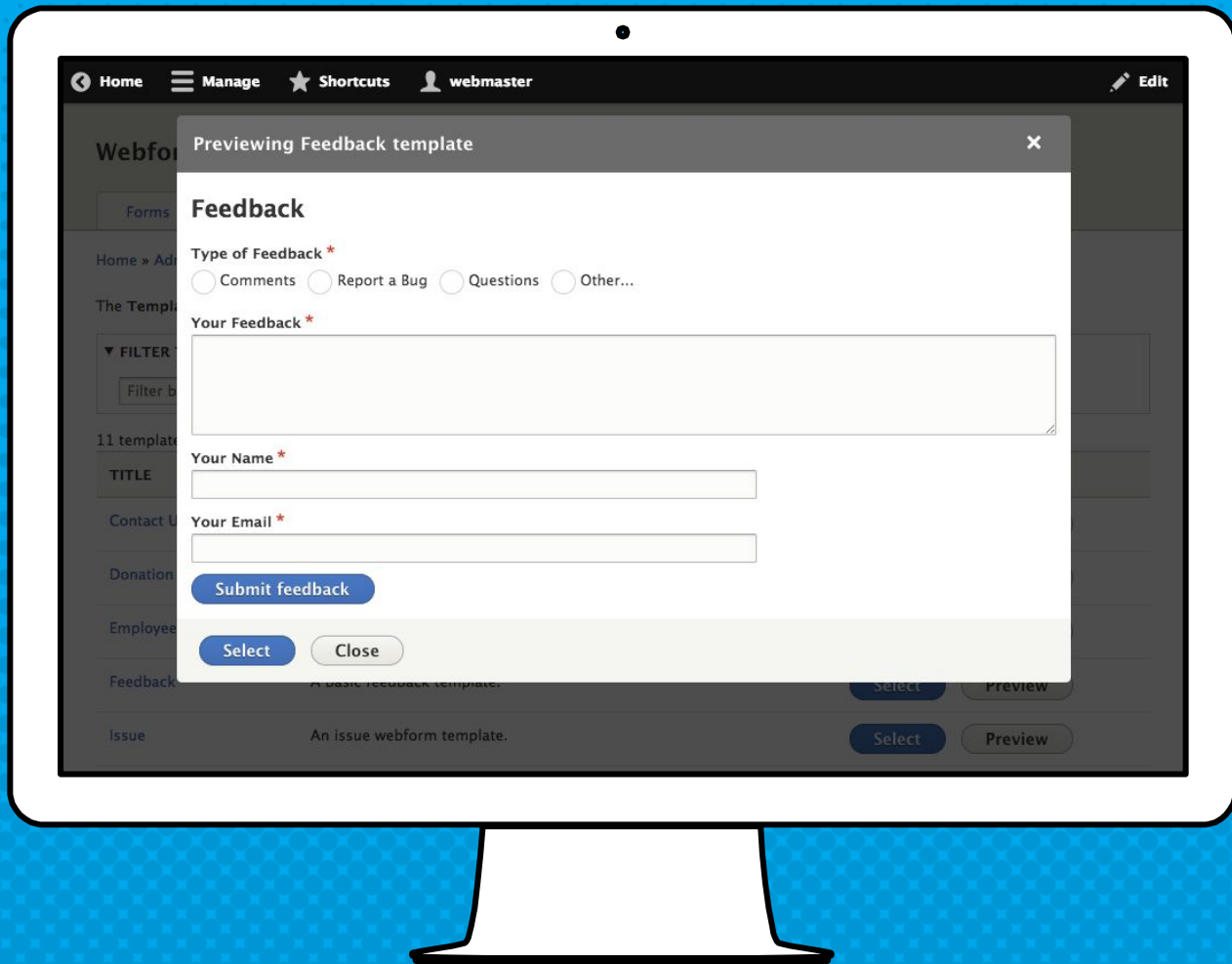


***TEMPLATES ARE FORMS  
THAT CAN BE  
COPIED TO  
CREATE NEW FORMS***

## ***WEBFORM TEMPLATES***

- × Templates are reusable forms
- × A form created from a template is a copy (a.k.a duplicate)
- × Changing or deleting a template does not change any existing forms

# THIS IS A WEBFORM TEMPLATE



A computer monitor with a white frame and a dark blue screen. The screen displays the text '<demo>' in a large, light blue font, and 'Selecting a template' in a smaller, yellow font below it. The background of the screen is dark blue. The monitor is set against a light blue background with a halftone dot pattern.

<demo>

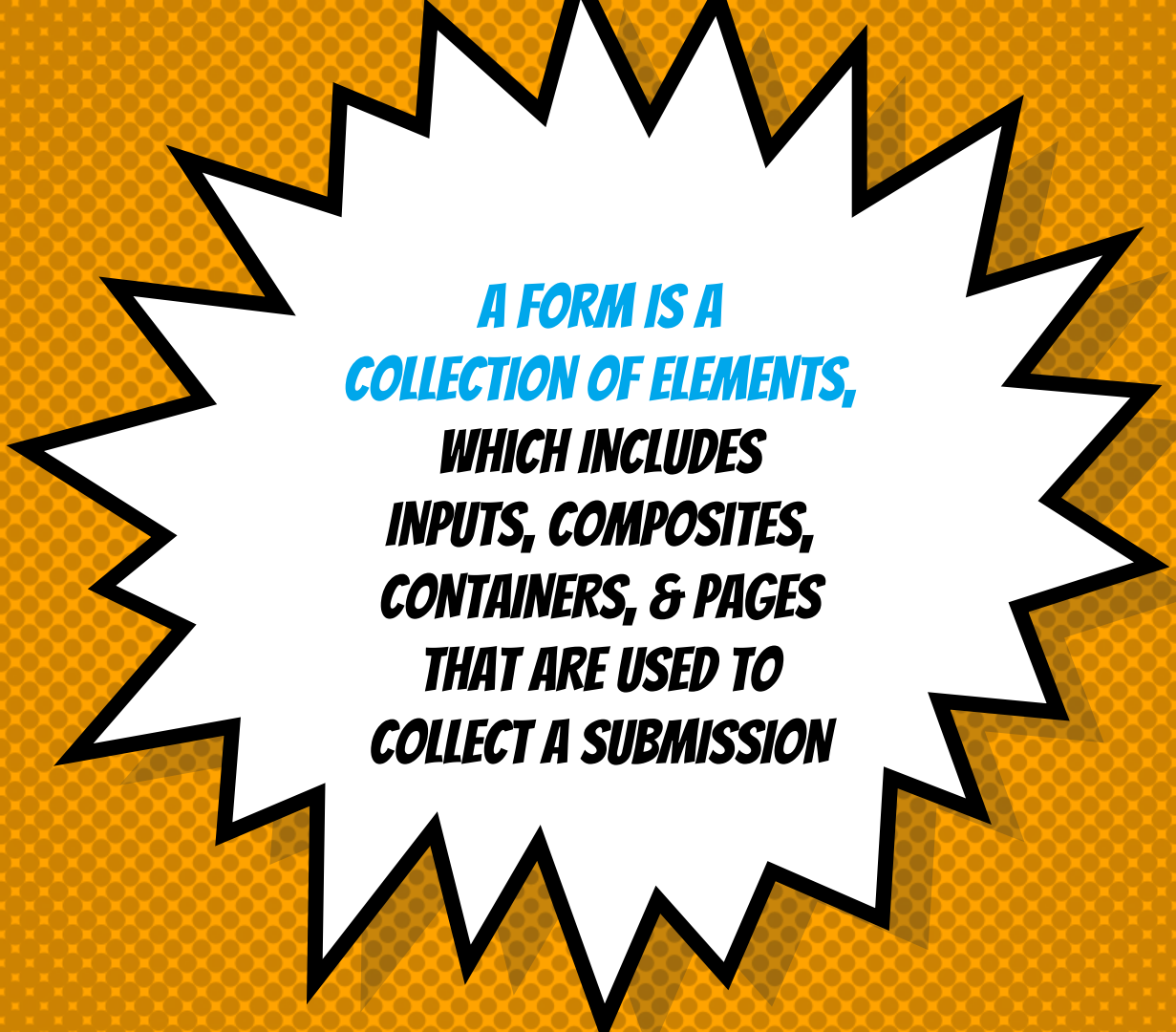
Selecting a template



***HOW DO YOU BUILD  
AWESOME FORMS?***



***THERE ARE***  
***ELEMENTS***  
***FOR THAT***



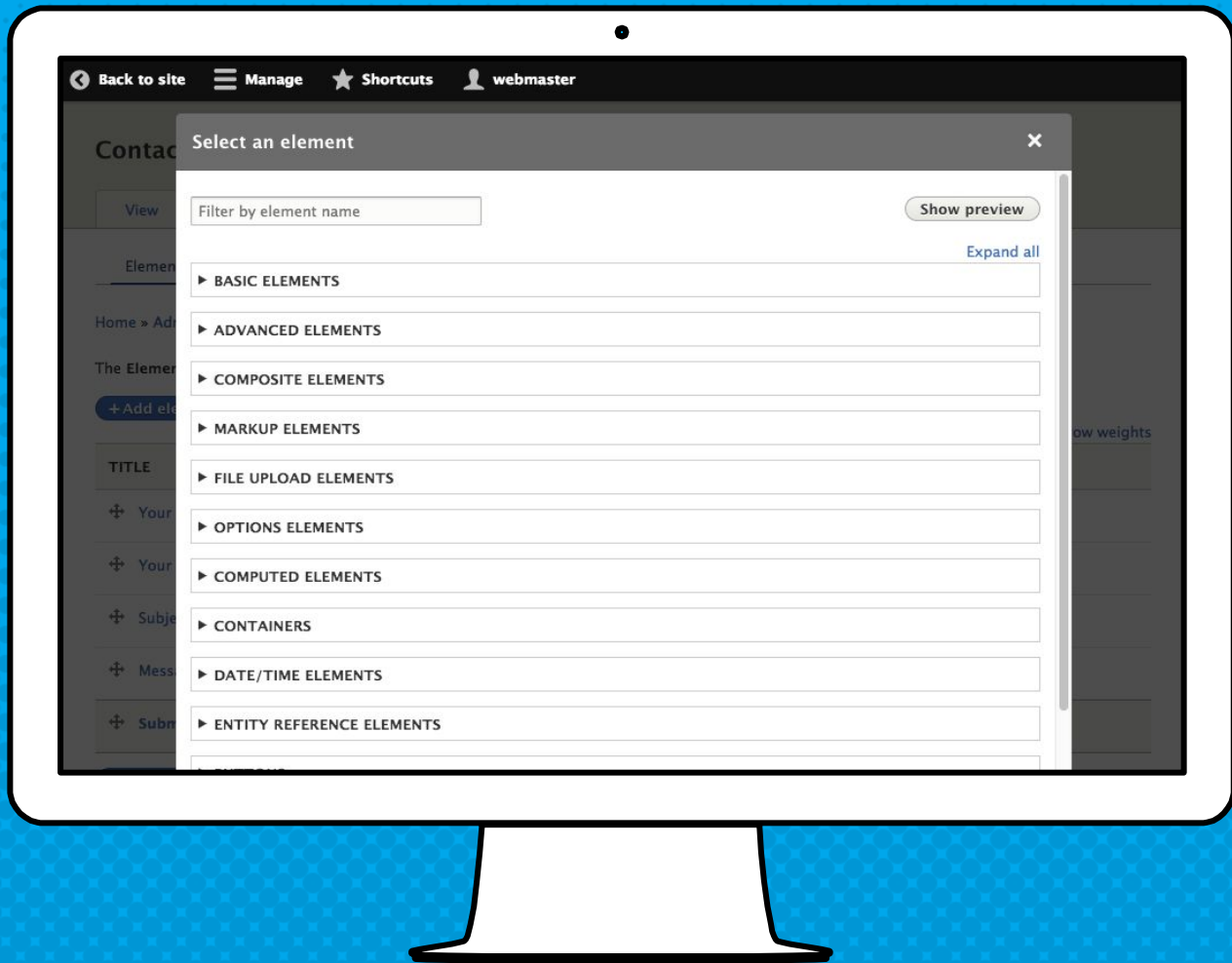
***A FORM IS A  
COLLECTION OF ELEMENTS,  
WHICH INCLUDES  
INPUTS, COMPOSITES,  
CONTAINERS, & PAGES  
THAT ARE USED TO  
COLLECT A SUBMISSION***

# ***THE ANATOMY OF A FORM***

- × **Elements**  
Anything that is displayed on a form
- × **Inputs**  
An element that collects a value
- × **Composites**  
A collection of inputs used to collect a group of values
- × **Containers**  
An element that holds sub-elements
- × **Pages**  
A container that is displayed as a page within a multi-step wizard



**THERE  
ARE MANY  
DIFFERENT  
TYPES OF  
ELEMENTS**

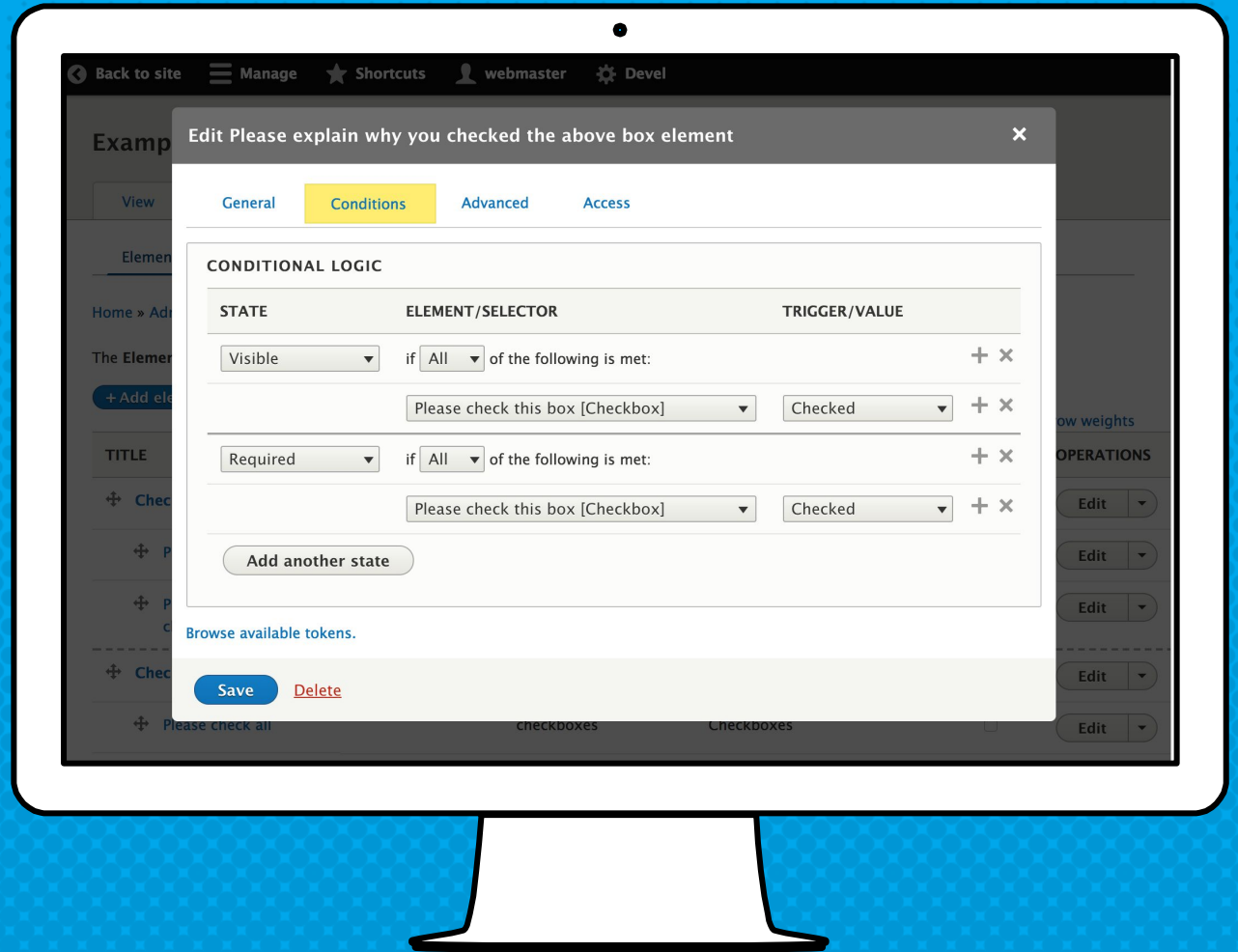


## ***THE ANATOMY OF A FORM ELEMENT***

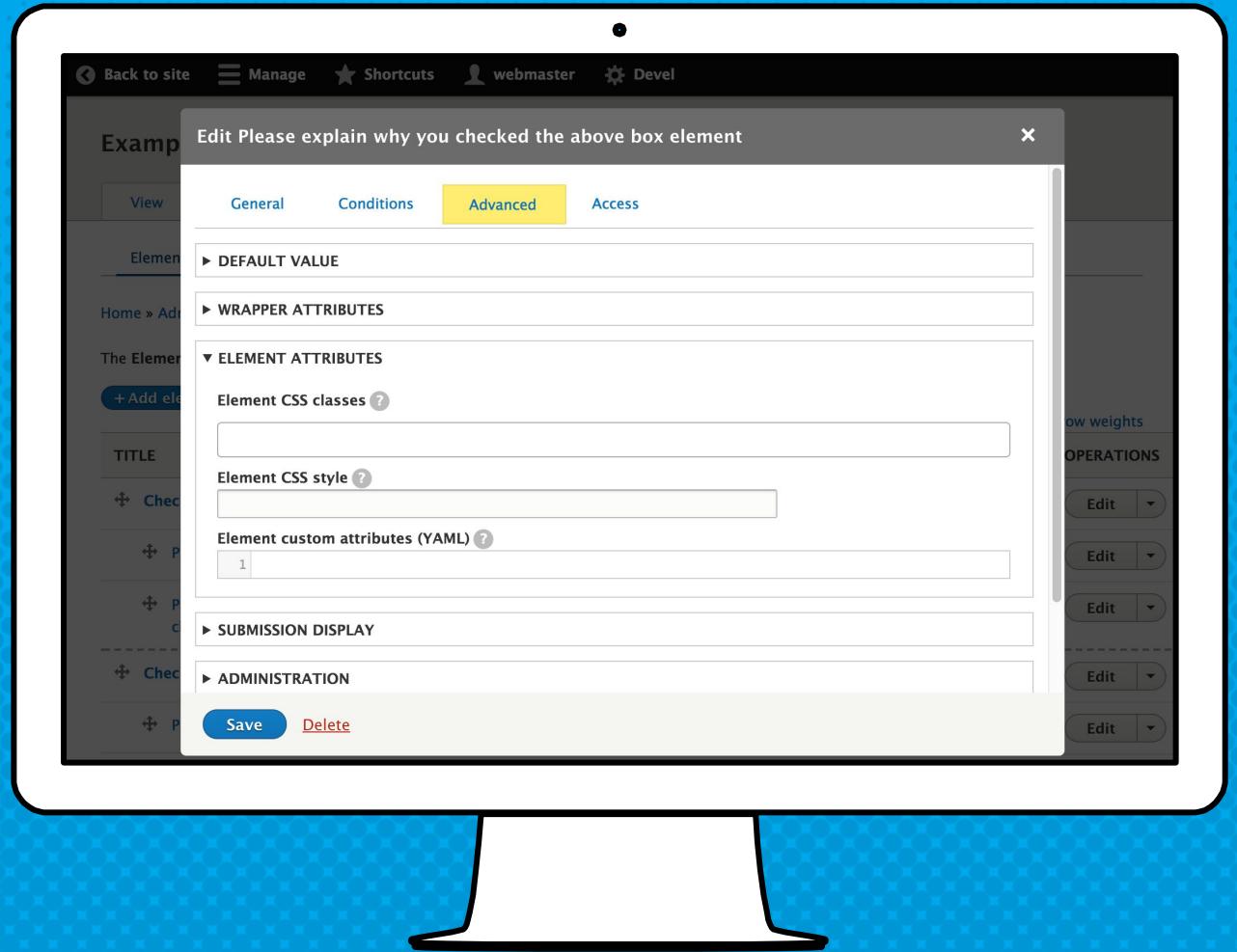
- × **Definition:** Name, cardinality, & default value
- × **Labels:** Title, description, “help” text & more
- × **Display:** Prefix, suffix, size, input masks, etc.
- × **Validation:** Required, unique, pattern, counter, etc.
- × **Conditions:** Hide/show, required & disabled
- × **Access:** Roles, user or permission
- × **Advanced:** Custom attributes & settings



# THIS IS CONDITIONAL LOGIC



# THESE ARE ADVANCED SETTINGS



## ***TYPES OF INPUTS***

- × **Text:** Text field, textarea, HTML editor and more....
- × **Options:** Checkboxes, radios, select, buttons, images, and more....
- × **File uploads:** Documents, images, videos, audio, and more....
- × **Widgets:** Rating, signature, phone, email, toggle, and more....
- × **Entity Reference:** Terms, nodes, and users

# ***TYPES OF CONTAINERS***

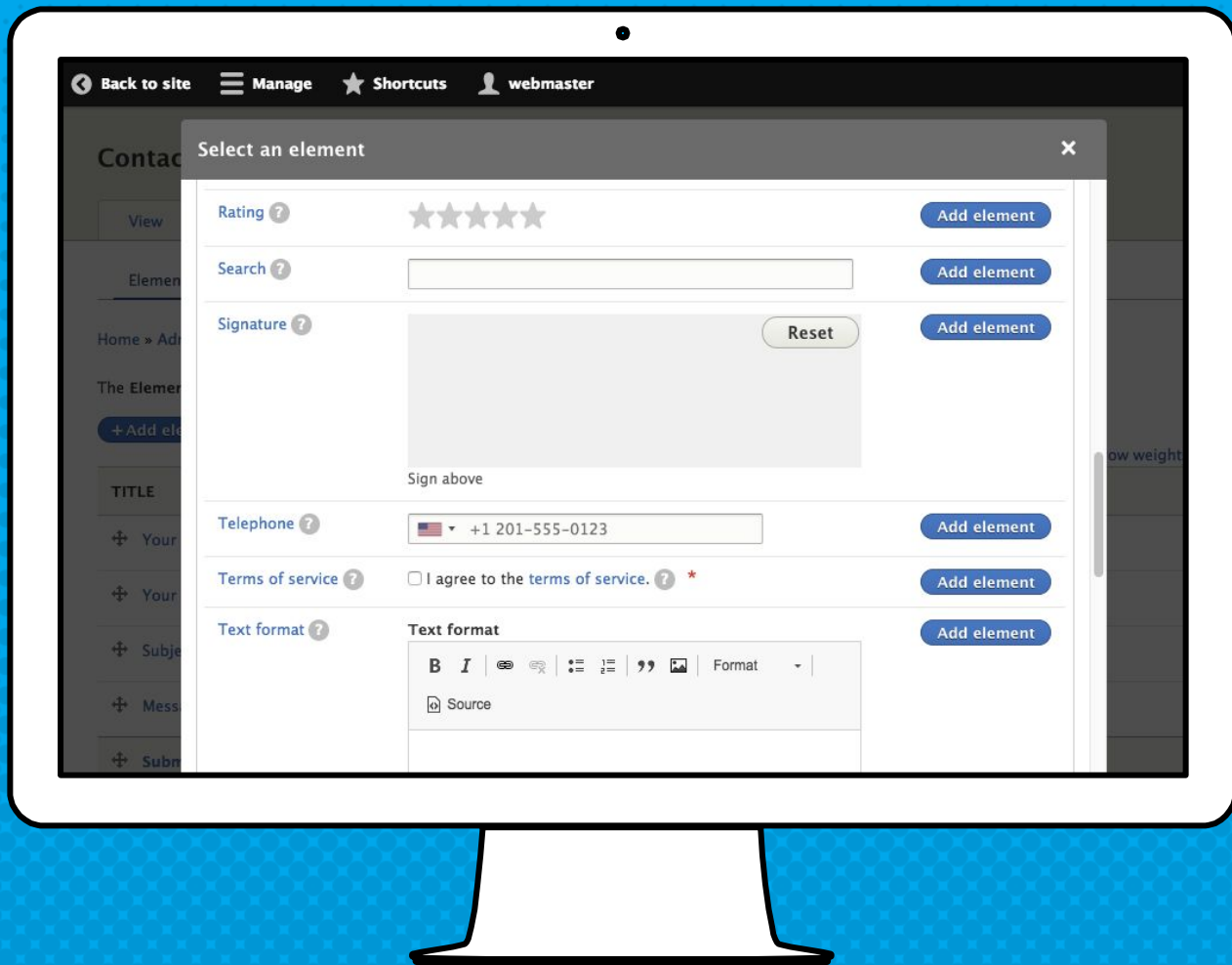
- × **Container:** Basic <div> with sub-elements
- × **Section:** Header with sub-elements
- × **Fieldset:** Group of elements
- × **Details:** Collapsible group of elements
- × **Flexbox:** Used for multi-column layouts

## ***TYPE OF COMPOSITE ELEMENTS***

- × **Likert (Surveys)**
- × **Locations/Address/Contact**
- × **Links/URLs**
- × **Names**
- × **Custom composite element**



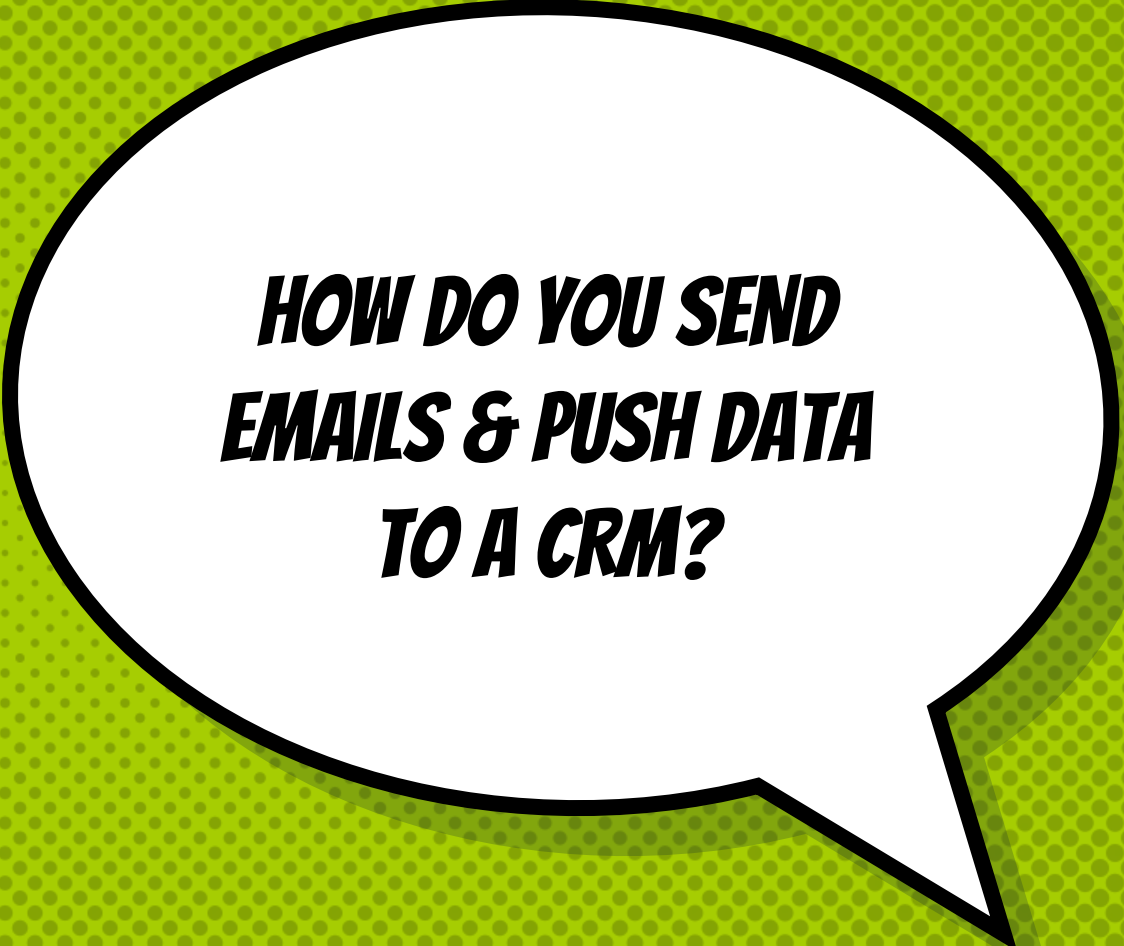
**DON'T FORGET  
THAT YOU CAN  
PREVIEW ALL  
AVAILABLE  
ELEMENTS**




A computer monitor with a white bezel and a black dot at the top center. The screen is dark blue and contains text. The background of the entire image is a light blue grid pattern.

<demo>

Getting to know the elements



***HOW DO YOU SEND  
EMAILS & PUSH DATA  
TO A CRM?***



***THERE IS A  
HANDLER  
FOR THAT***



***HANDLERS ARE USED TO  
ROUTE SUBMITTED DATA  
TO APPLICATIONS  
& SEND EMAIL NOTIFICATIONS***

## ***WEBFORM HANDLER USE CASES***

- × Email notification and confirmation
- × Push data to CRM
- × Subscribe to mailing lists
- × Flag a submission based on submitted values
- × Conditionally change confirmation message

## ***WEBFORM HANDLERS***

### **Email & Scheduled Email**

Sends a webform submission via an email

### **Action & Settings**

Trigger a conditional action or setting on a submission

### **Remote Post**

Posts webform submissions to a URL

### **Debug**

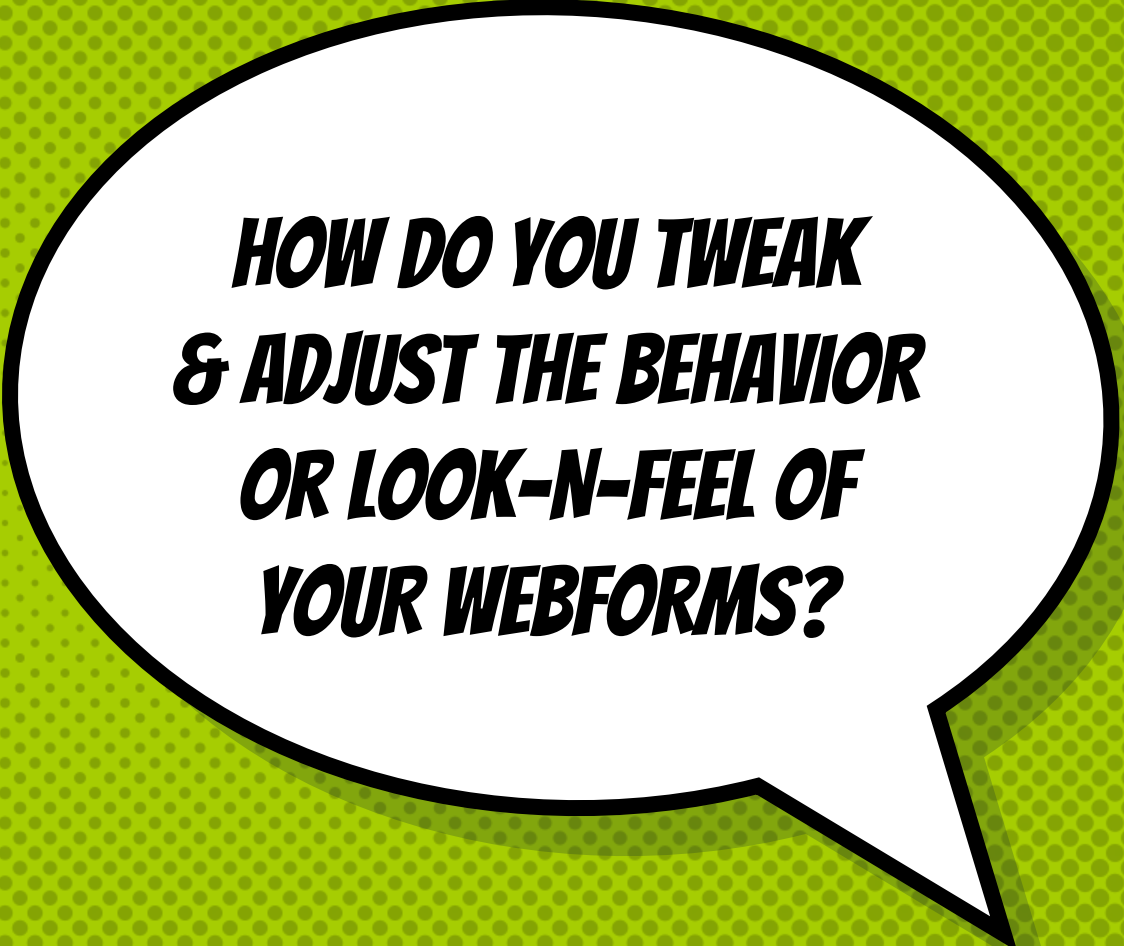
Debug webform submission

A computer monitor with a white frame and a dark blue screen. The screen displays the text '<demo>' in a large, light blue font. Below it, the text 'Sending email & remote posts' is displayed in a smaller, yellow font. The monitor is set against a light blue background with a halftone dot pattern.

<demo>

Sending email & remote posts

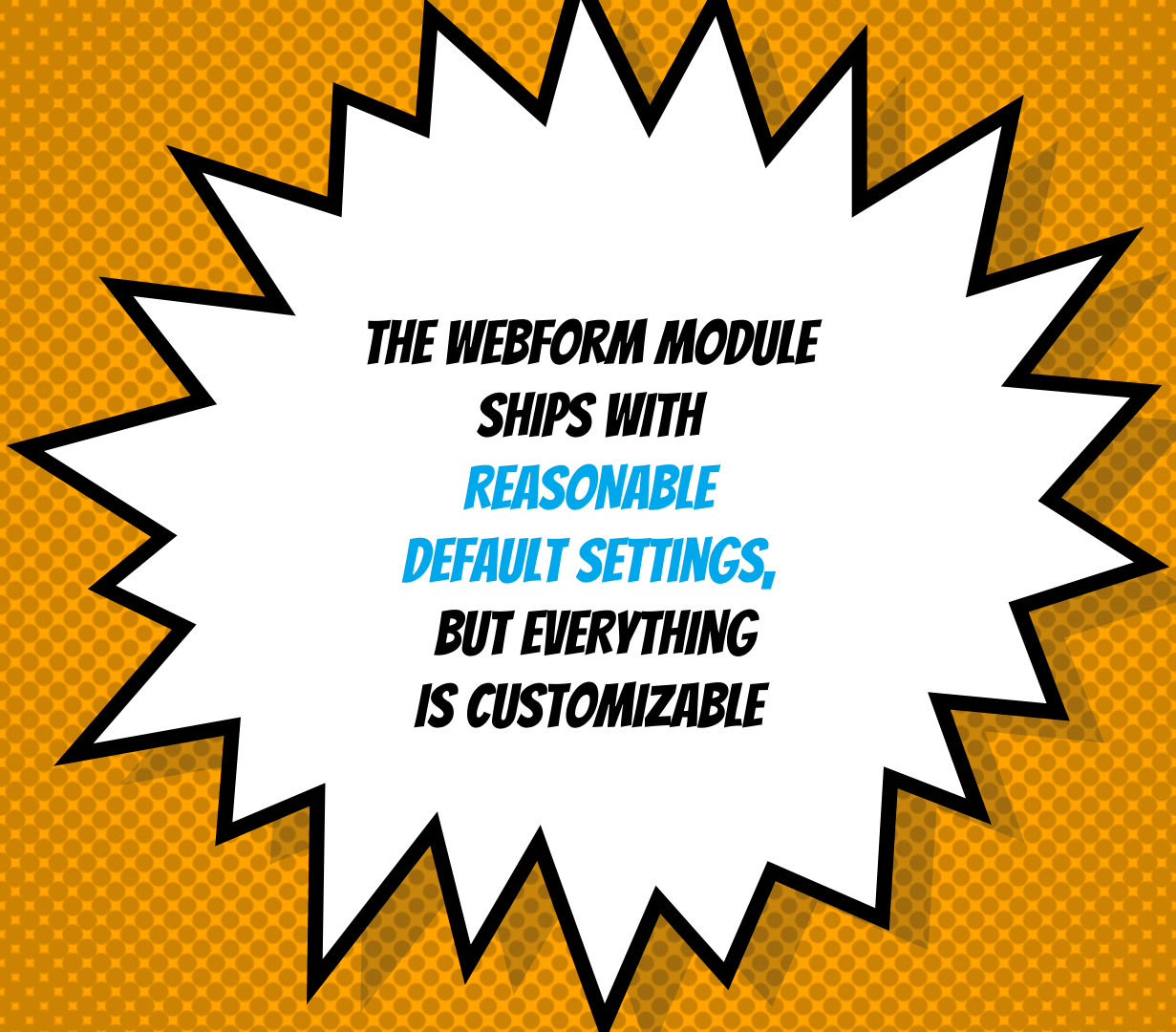




***HOW DO YOU TWEAK  
& ADJUST THE BEHAVIOR  
OR LOOK-N-FEEL OF  
YOUR WEBFORMS?***



***THERE ARE  
SETTINGS  
FOR THAT***



***THE WEBFORM MODULE  
SHIPS WITH  
REASONABLE  
DEFAULT SETTINGS,  
BUT EVERYTHING  
IS CUSTOMIZABLE***

**X GENERAL**

**X FORM**

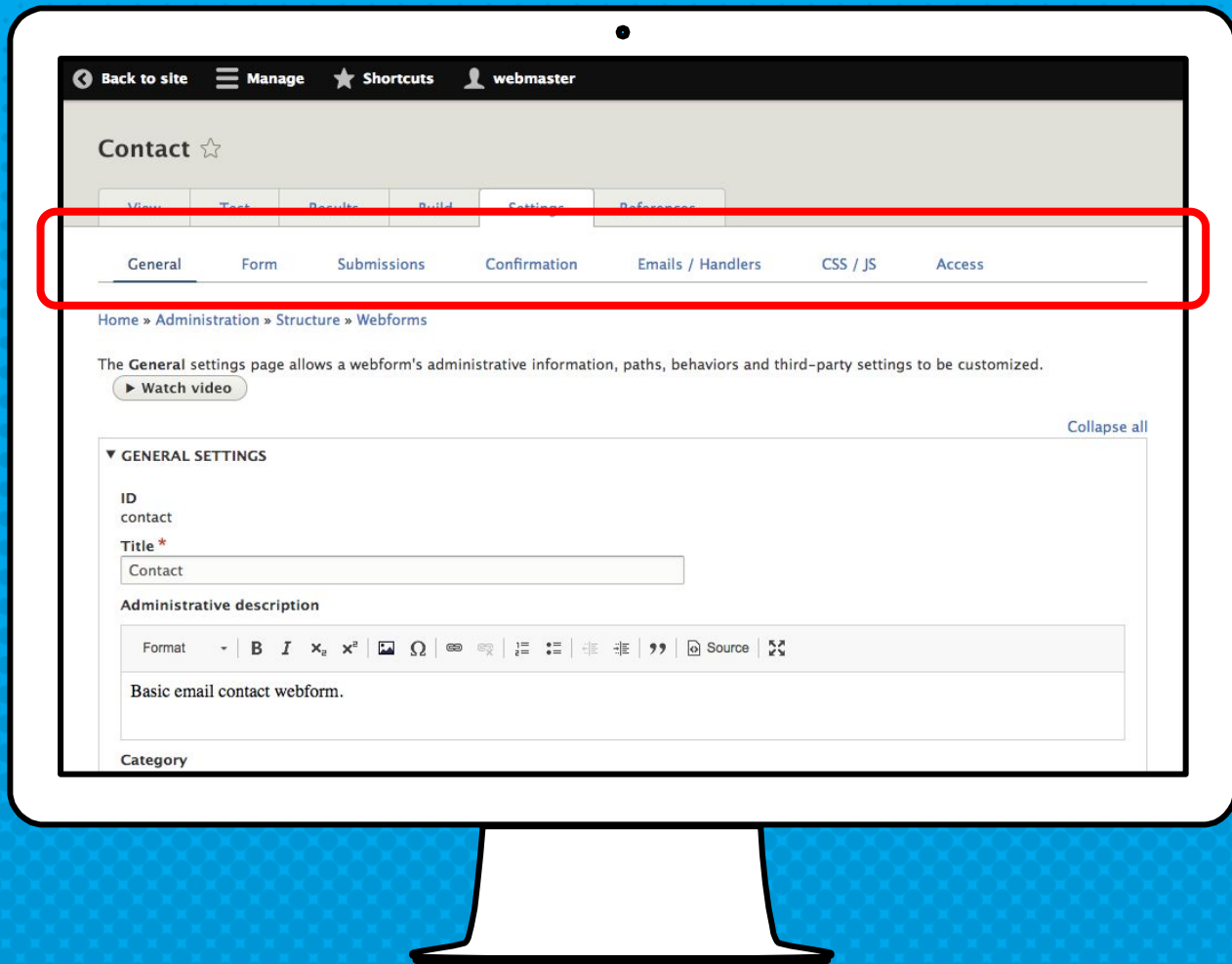
**X SUBMISSIONS**

**X CONFIRMATION**

**X EMAIL/HANDLERS**

**X CSS/JS**

**X ACCESS**



## ***GENERAL SETTINGS***

- × Disable saving of results
- × Use the webform as a template
- × Customize URL aliases
- × Ajaxify the form
- × Third party settings (e.g., Honeypot & Antibot)

## ***FORM SETTINGS & BEHAVIORS***

- × Set open and close dates
- × Customize messages and labels
- × Pre-populate using query string parameters
- × Tweak multi-step wizard progress bar
- × Enable submission previews

## ***SUBMISSION SETTINGS & BEHAVIORS***

- × Submission labels and messages
- × Submission limits
- × Save drafts
- × Submission purging
- × Autofill

## ***CONFIRMATION TYPES & MESSAGES***

- × Dedicated confirmation page
- × Inline message
- × Status message
- × Modal confirmation dialog
- × Redirect to external or internal URLs



## ***CUSTOM CSS & JAVASCRIPT***

Site builders and front end developers can inject custom CSS & JavaScript to tweak a webform's look-n-feel and client-side behaviors.

- × Tweaks font types and sizes
- × Adjusts margins, padding, and layout
- × Client-side validation and/or hide/show logic

## ***ACCESS CONTROLS***

Set access rules by role, user, and/or permission

Rules include:

- × Create, view, update, delete, and purge *all* submissions or own submissions
- × Administer webform and submissions

A computer monitor with a white bezel and a black dot at the top center. The screen is dark blue and contains text. The background of the entire image is a light blue halftone pattern.

<demo>

Customizing a webform's look-n-feel

***SHOULD YOU  
CUSTOMIZE  
EVERYTHING?***

***SHOULD YOU  
CUSTOMIZE  
NOTHING?***

## ***TIPS FOR MANAGING SETTINGS & BEHAVIORS***

- × Know what is possible (and impossible)
  - × **Keep It Simple Stupid (K.I.S.S. principle)**
- 
- × Default settings can be applied using `hook_webform_create()`
  - × Templates can define default settings



***HOW CAN YOU CHANGE  
GLOBAL/DEFAULT SETTINGS?***



***THERE IS***  
***CONFIGURATION***  
***FOR THAT***



***CONFIGURATION  
DEFINES THE DEFAULT  
FEATURES, FUNCTIONALITY,  
& BEHAVIORS  
AVAILABLE TO  
ALL WEBFORMS***



## ***THINGS THAT SHOULD ALWAYS BE CONFIGURED***

- × Private file access for file uploads
- × SPAM protection
- × Available elements
- × API keys
- × Reusable options

**X FORMS**

**X ELEMENTS**

**X OPTIONS**

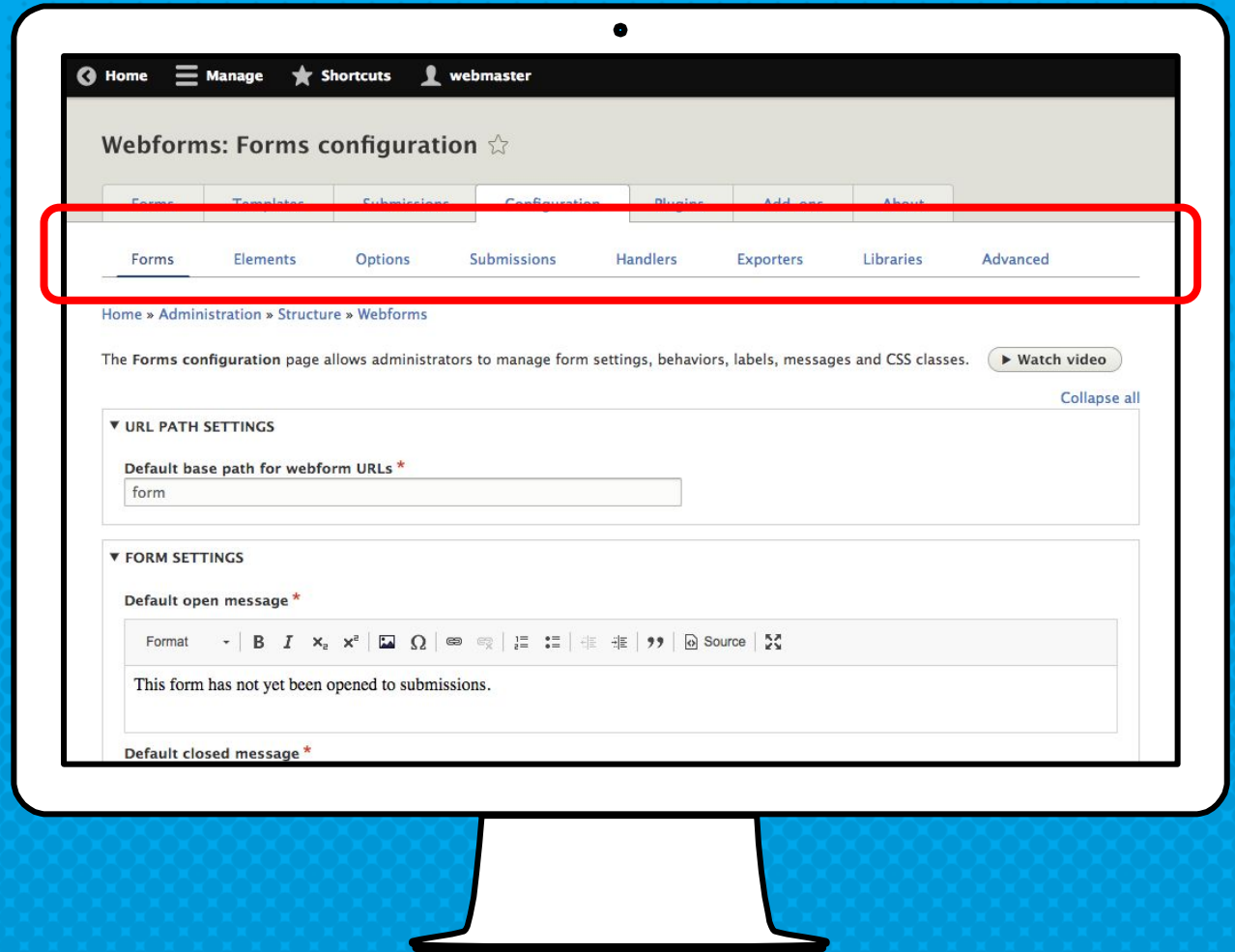
**X SUBMISSIONS**

**X HANDLERS**

**X EXPORTERS**

**X LIBRARIES**

**X ADVANCED**





**<demo>**

**Managing elements, options  
& libraries**

***THERE IS A  
CONFIGURATION  
FOR THAT!!!***





***WHAT IF YOU CAN'T  
CONFIGURE SOMETHING  
VIA THE USER INTERFACE?***

***THERE IS A MODULE,  
HOOK, OR TEMPLATE  
FOR THAT!!!***





***HOW DO YOU PLACE  
A WEBFORM  
ON YOUR WEBSITE?***



***THERE ARE***  
***WEBFORM BLOCKS***  
***FOR THAT***





**WEBFORM BLOCKS ARE  
BLOCKS THAT  
DISPLAY A WEBFORM**

## ***WEBFORM BLOCKS***

- × Make it easy to include a webform within layouts and panels
- × Allow a webform to be placed anywhere on the page
- × Allow a webform to be attached to any page on a website

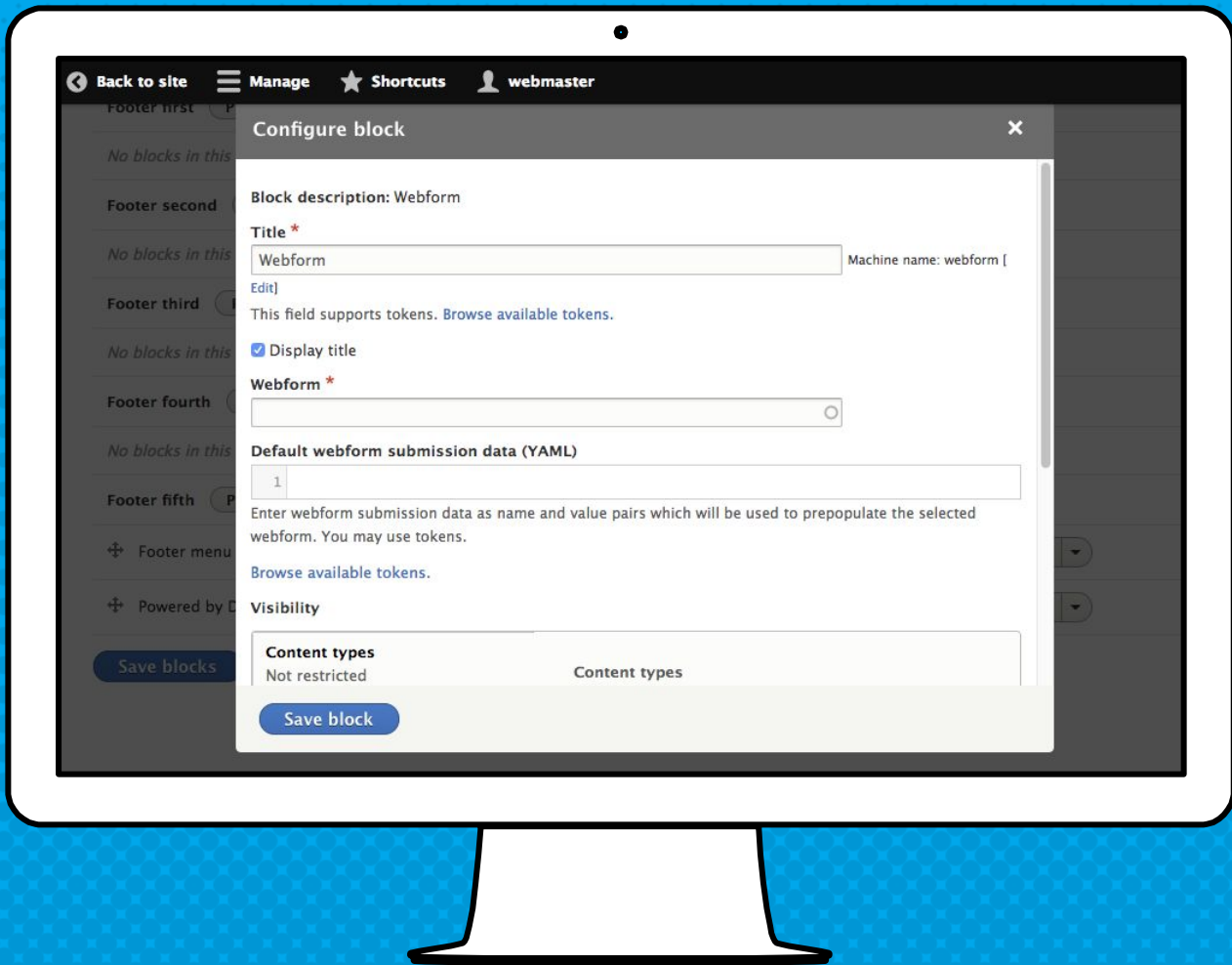
# A

# WEBFORM

# BLOCK

# CAN GO

# ANYWHERE





`<demo>`

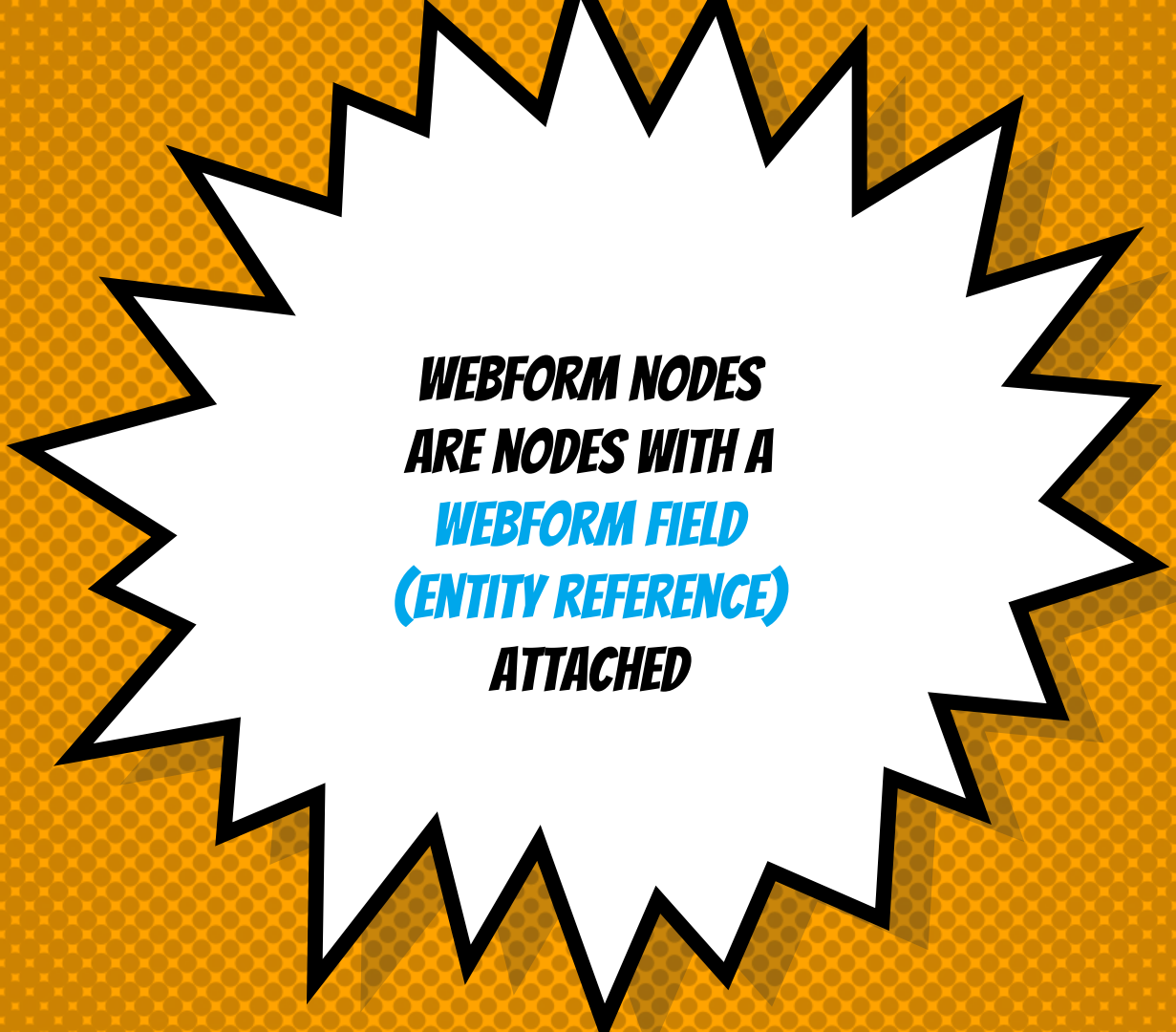
Placing a webform block



***HOW DO YOU  
FULLY INTEGRATE  
A WEBFORM  
INTO YOUR WEBSITE?***



***THERE ARE  
WEBFORM NODES  
FOR THAT***



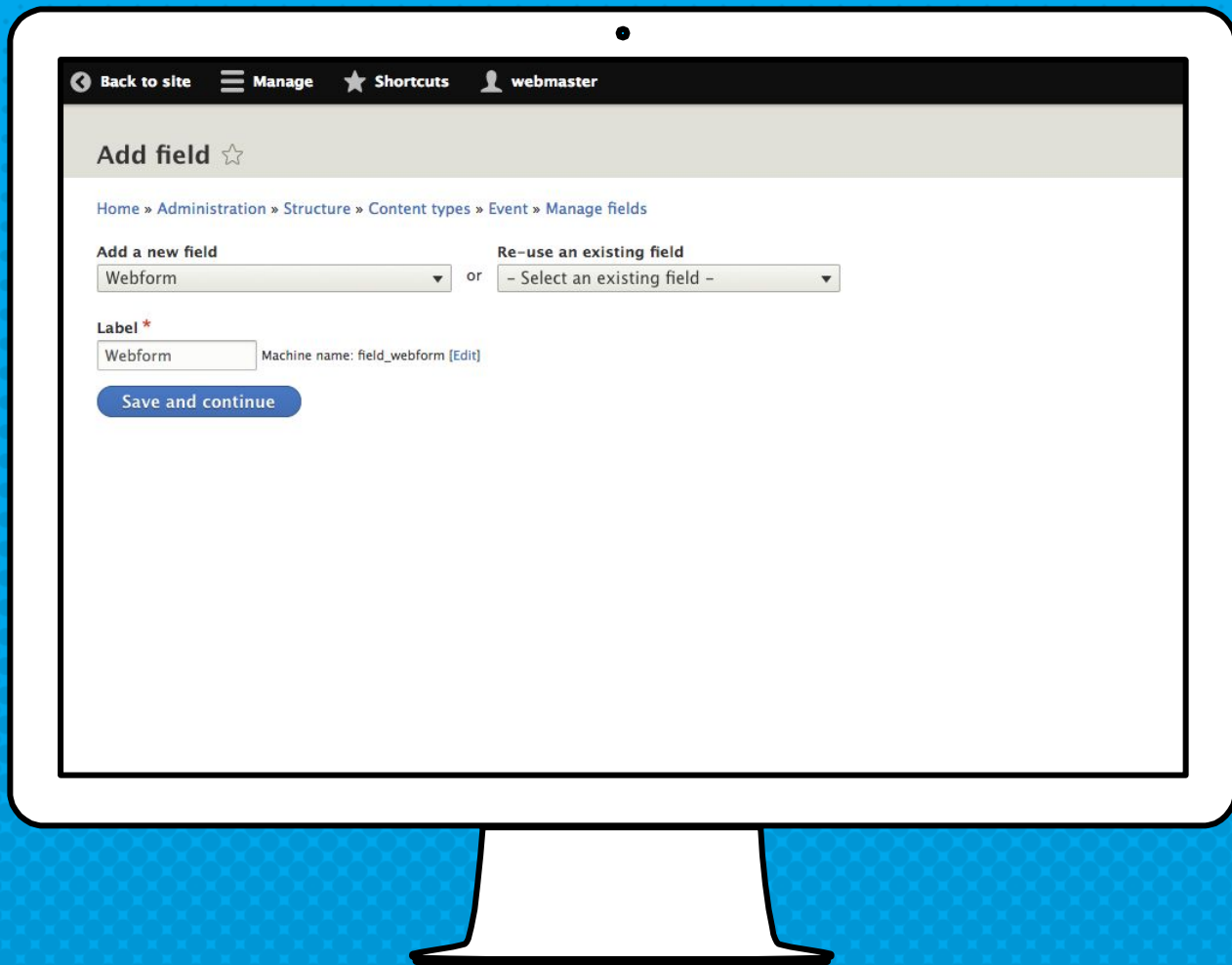
**WEBFORM NODES  
ARE NODES WITH A  
WEBFORM FIELD  
(ENTITY REFERENCE)  
ATTACHED**

## ***THE WEBFORM NODE MODULE***

- × **Provides a webform content type**  
Any content type can have a webform
- × **Tracks node specific submissions**  
Adds 'Test' and 'Results' to node edit tasks (a.k.a. Tabs)
- × **Adds 'References' to the webform edit tab**  
References tab track all webform node instances



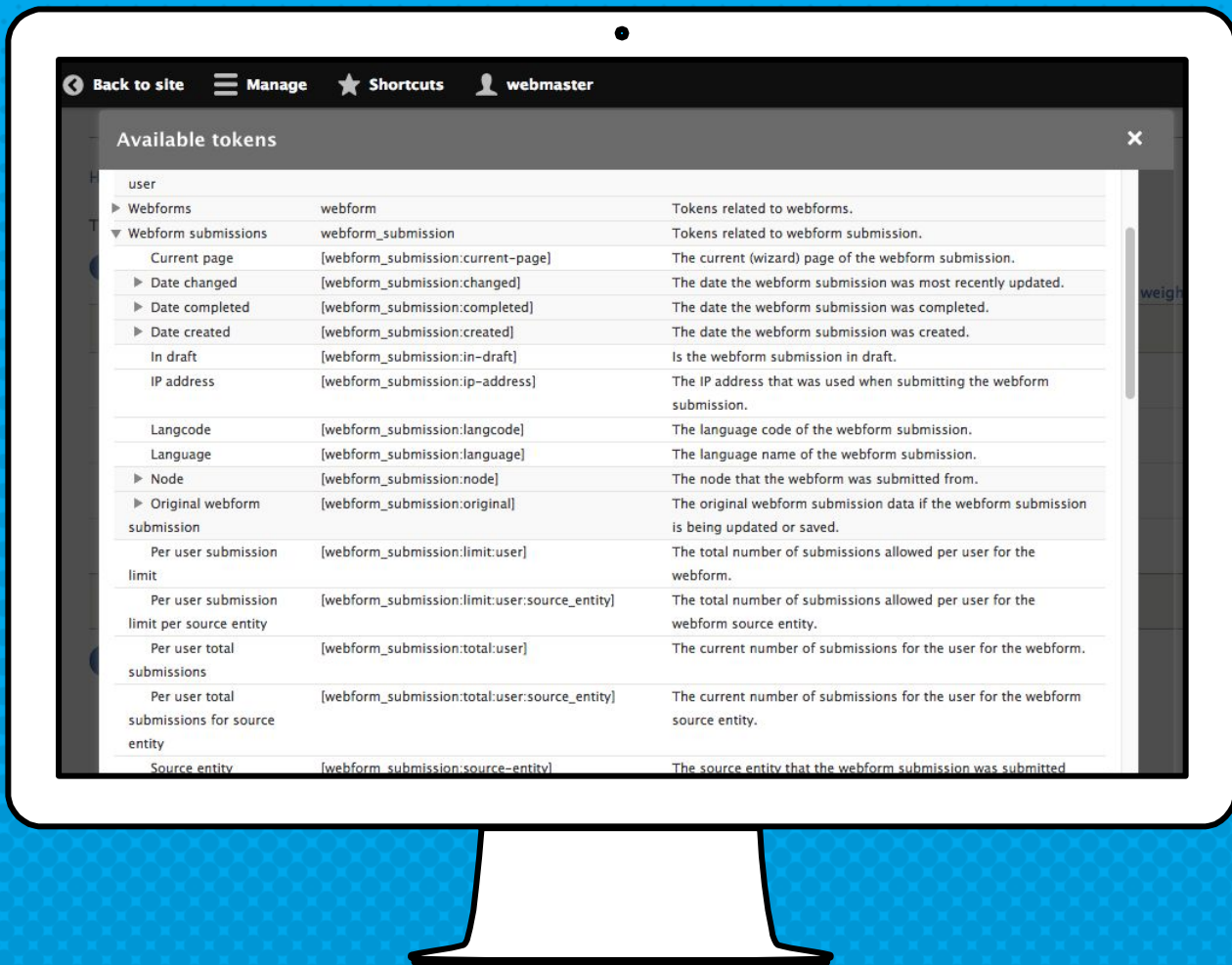
**THE  
WEBFORM  
FIELD  
CAN BE ADDED  
TO ANY  
CONTENT ENTITY**



## ***TIPS AND TRICKS FOR WEBFORM FIELDS & NODES***

- × Tokens can be used to pass node field values to webform settings  
`[webform_submission:node:field_confirmation_message]`
- × Computed elements can also be used to display webform node values

# WEBFORM TOKENS ARE VERY FLEXIBLE





<demo>

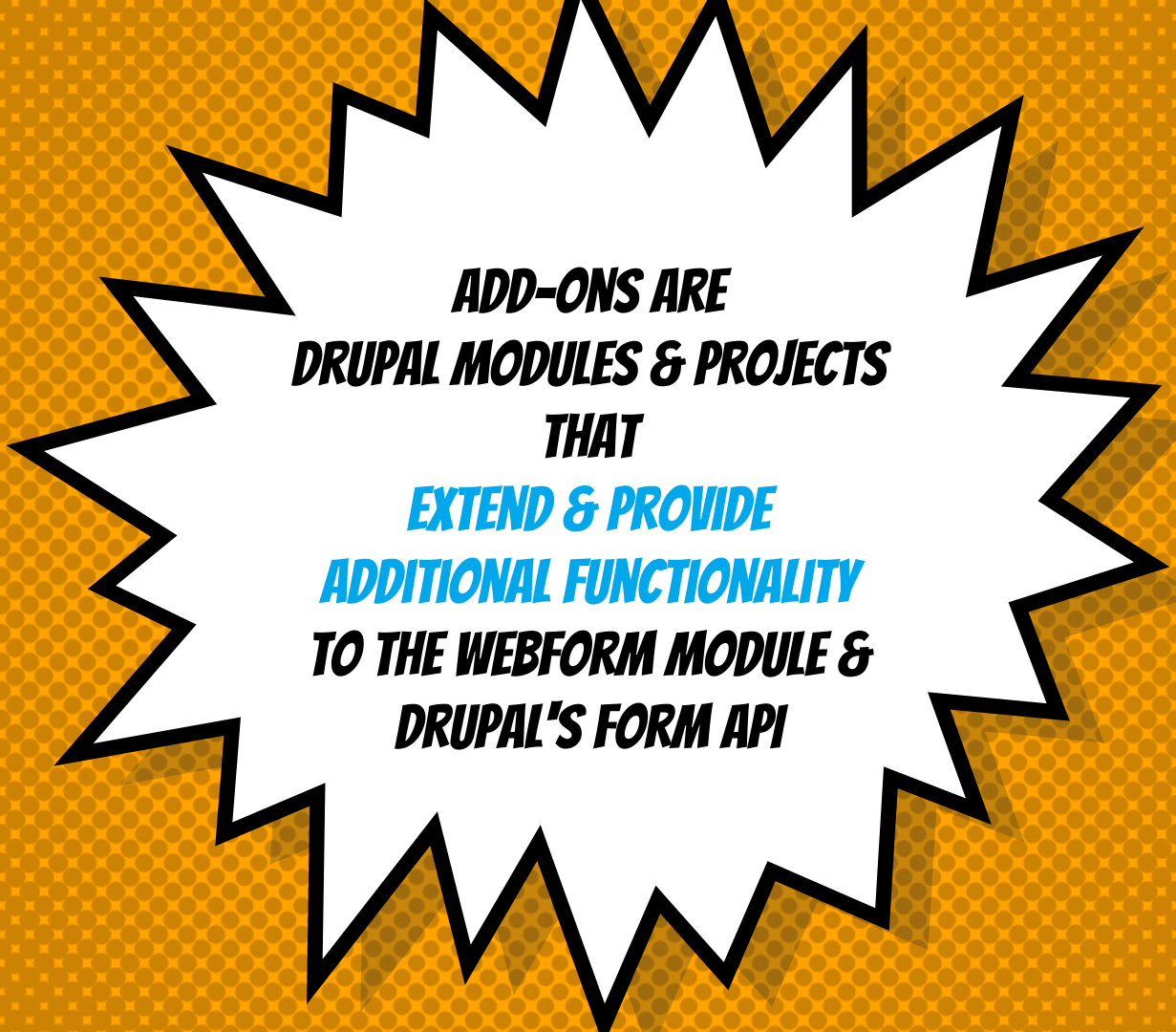
Building webform nodes



***HOW CAN YOU EXTEND  
THE WEBFORM MODULE?***

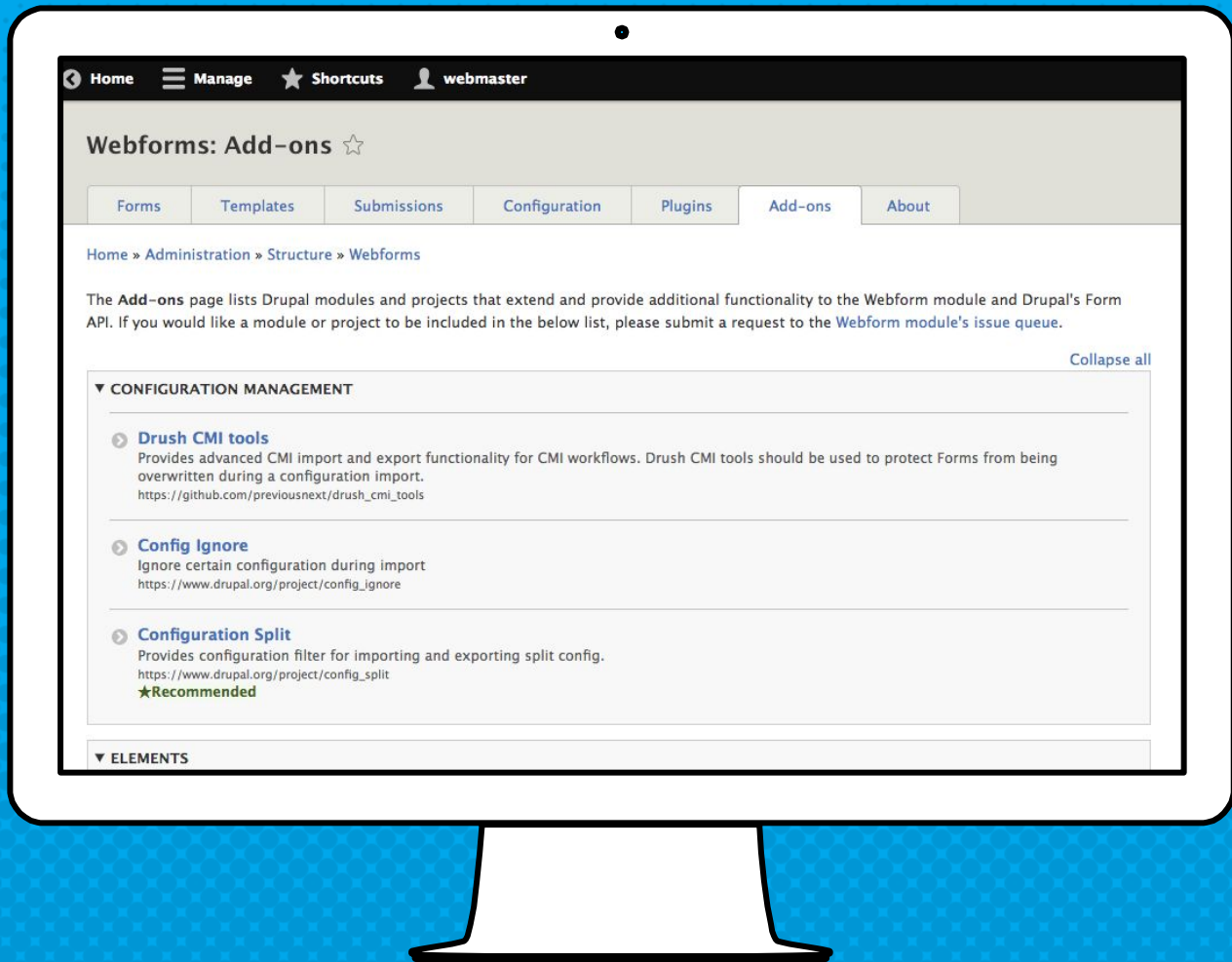


***THERE ARE***  
***ADD-ONS***  
***FOR THAT***



**ADD-ONS ARE  
DRUPAL MODULES & PROJECTS  
THAT  
EXTEND & PROVIDE  
ADDITIONAL FUNCTIONALITY  
TO THE WEBFORM MODULE &  
DRUPAL'S FORM API**

**THERE  
ARE A LOT  
OF USEFUL  
ADD-ONS  
AVAILABLE,  
& MORE  
TO COME...**





## ***TYPES OF WEBFORM ADD-ONS***

- × SPAM Protection
  - × Validation
  - × Elements
  - × Integration
  - × Submissions
  - × Mail
- 
- × REST
  - × Configuration
  - × Migrate
  - × Multilingual
  - × Utility
  - × Development

## ***ADD-ONS THAT IMPROVE USER EXPERIENCE***

- × **Honeypot**

Mitigates spam form submissions using the honeypot method

<https://www.drupal.org/project/honeypot>

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- × **CAPTCHA**

Provides CAPTCHA for adding challenges to arbitrary forms

<https://www.drupal.org/project/captcha>

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- × **Client-side Validation**

Adds client-side validation to forms

[https://www.drupal.org/project/clientside\\_validation](https://www.drupal.org/project/clientside_validation)

## ***ADD-ONS THAT IMPROVE SITE BUILDER EXPERIENCE***

- × **IMCE**

IMCE is an image/file uploader and browser

<https://www.drupal.org/project/imce>

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- × **Webform Views**

Integrates Webform 8.x-5.x and Views modules

[https://www.drupal.org/project/webform\\_views](https://www.drupal.org/project/webform_views)

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- × **Webform Analysis**

Used to obtain statistics on the results of form submissions

[https://www.drupal.org/project/webform\\_analysis](https://www.drupal.org/project/webform_analysis)

## ***ADD-ONS THAT IMPROVE DEVELOPER EXPERIENCE***

- × **Webform Migrate**

Provides migration routines from d6, d7 webform to d8 webform

[https://www.drupal.org/project/webform\\_migrate](https://www.drupal.org/project/webform_migrate)

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- × **Webform Composite Tools**

Provides a reusable composite element for use on webforms

[https://www.drupal.org/project/webform\\_composite](https://www.drupal.org/project/webform_composite)

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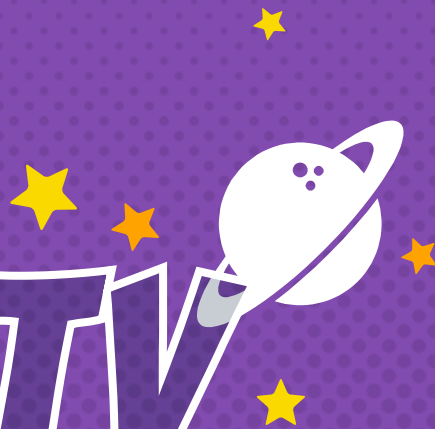
- × **Maillog / Mail Developer**

A utility to log all Mails for debugging purposes

<https://www.drupal.org/project/maillog>

# THE DRUPAL

# COMMUNITY



The Drupal community's ability to provide contributed modules (and core) is the real power behind the Webform module.





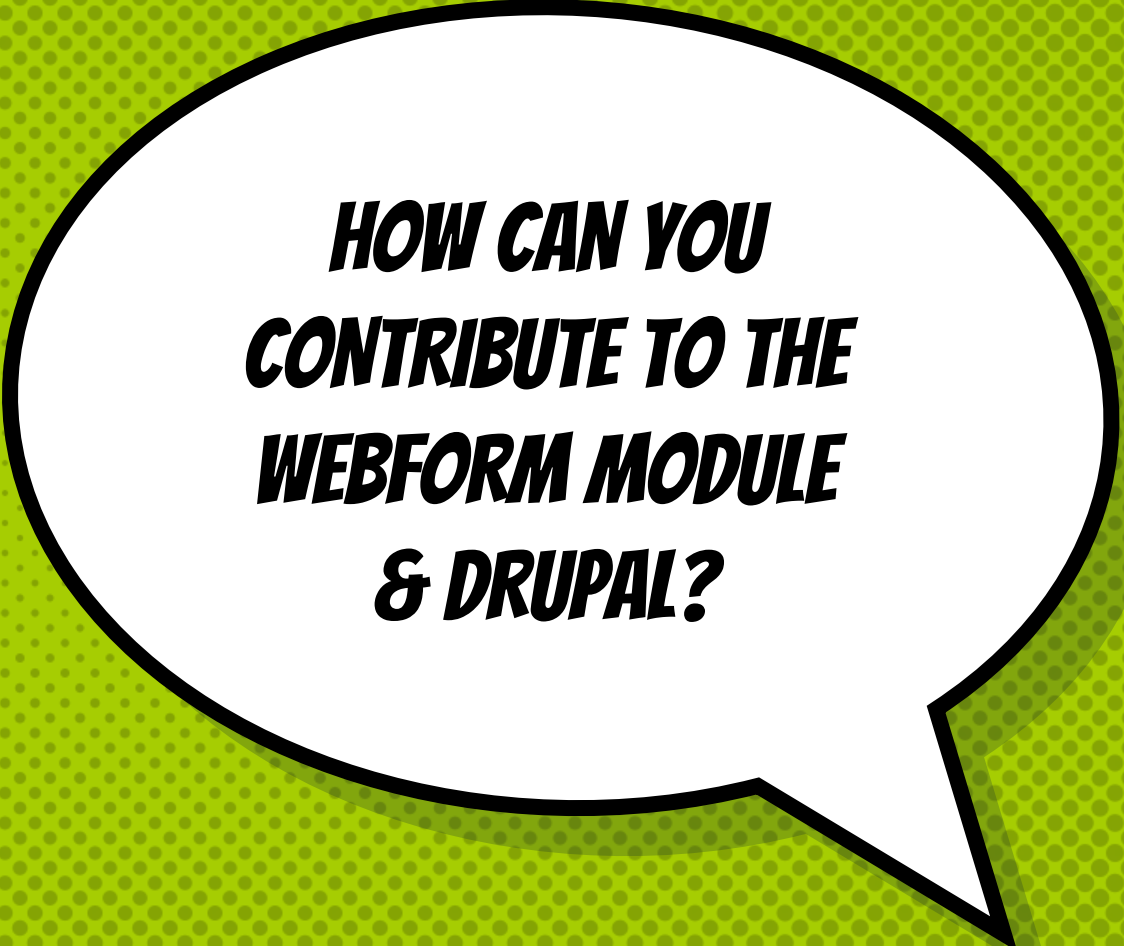
***THIS IS DRUPAL***

***NOT SHOULD...***

***BUT HOW CAN***

***YOU CONTRIBUTE***






***HOW CAN YOU  
CONTRIBUTE TO THE  
WEBFORM MODULE  
& DRUPAL?***



***THERE IS THE  
CONTRIBUTE MODULE  
FOR THAT***



***THE CONTRIBUTE MODULE  
ENCOURAGES PEOPLE TO  
JOIN THE DRUPAL COMMUNITY,  
BECOME A MEMBER OF THE  
DRUPAL ASSOCIATION,  
& CONTRIBUTE TO DRUPAL***

Status report | Webform Demo x Jacob




localhost/wf/admin/reports/status

Back to site Manage Shortcuts webmaster Devel




## Status report ☆

Home » Administration » Reports

Here you can find a short overview of your site's parameters as well as any problems detected with your installation. It may be useful to copy and paste this information into support requests filed on [Drupal.org's support forums](#) and project issue queues. Before filing a support request, ensure that your web server meets the [system requirements](#).

 <b>1 ERROR</b> <a href="#">Details</a>	 <b>3 WARNINGS</b> <a href="#">Details</a>	 <b>29 CHECKED</b> <a href="#">Details</a>
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### COMMUNITY INFORMATION

 <b>Drupal.org Account</b> When you <a href="#">create a Drupal.org account</a> , you gain access to a whole ecosystem of Drupal.org sites and services. Your account works on Drupal.org and any of its subsites	 <b>Drupal Association Membership</b> The Drupal Association is dedicated to fostering and supporting the Drupal software project, the community and its growth. We help	 <b>Contributions to Drupal</b> As an open source project, we don't have employees to provide Drupal improvements and support. <b>We depend on our diverse community of passionate</b>
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The Contribute Module

***PLEASE JOIN  
THE DRUPAL  
ASSOCIATION***





***WHERE CAN YOU  
GET HELP &  
LEARN MORE?***



***THERE IS MORE  
INFORMATION  
ABOUT...***

## ***CONNECTING WITH ME***

- × Jacob Rockowitz  
<http://jrockowitz.com>
- 

- × jrockowitz on Drupal.org  
<https://www.drupal.org/u/jrockowitz>
- 

- × jrockowitz on Twitter  
<https://twitter.com/jrockowitz>

## ***THE WEBFORM MODULE***

- × Documentation, Cookbook, & Screencasts

<https://www.drupal.org/docs/8/modules/webform>

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- × Drupal Answers

<http://drupal.stackexchange.com>

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- × Webform Issue Queue

<https://www.drupal.org/project/issues/webform?version=8.x>



# ***THE DRUPAL COMMUNITY***

- × Drupal Association (Membership)

<https://www.drupal.org/association>

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- × Drupal Planet (Blogs)

<https://www.drupal.org/planet>

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- × Drupal Newsletter (Email)

<https://www.drupal.org/association/newsletter>



***ARE WE DONE YET?***

***RALPH SAYS...***



***YES!!!***

***ANY QUESTIONS?***