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...

BUILD   COLLECT   DISTRIBUTED
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.
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
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 a webform element edit form.
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.
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
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
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
<table>
<thead>
<tr>
<th>Forms</th>
<th>Elements</th>
<th>Options</th>
<th>Submissions</th>
<th>Handlers</th>
<th>Exporters</th>
<th>Libraries</th>
<th>Advanced</th>
</tr>
</thead>
</table>

The Forms configuration page allows administrators to manage form settings, behaviors, labels, messages and CSS classes.

**URL PATH SETTINGS**

Default base path for webform URLs *

```
form
```

**FORM SETTINGS**

Default open message *

This form has not yet been opened to submissions.

Default closed message *
<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.
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...

<table>
<thead>
<tr>
<th><strong>Configuration Management</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>Drush CMI tools</strong></td>
</tr>
<tr>
<td>Provides advanced CMI import and export functionality for CMI workflows. Drush CMI tools should be used to protect Forms from being overwritten during a configuration import.</td>
</tr>
<tr>
<td><a href="https://github.com/previousnext/drush_cmi_tools">https://github.com/previousnext/drush_cmi_tools</a></td>
</tr>
<tr>
<td><strong>Config Ignore</strong></td>
</tr>
<tr>
<td>Ignore certain configuration during import</td>
</tr>
<tr>
<td><a href="https://www.drupal.org/project/config_ignore">https://www.drupal.org/project/config_ignore</a></td>
</tr>
<tr>
<td><strong>Configuration Split</strong></td>
</tr>
<tr>
<td>Provides configuration filter for importing and exporting split config.</td>
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**Recommended**
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

× CAPTCHA
Provides CAPTCHA for adding challenges to arbitrary forms
https://www.drupal.org/project/captcha

× Client-side Validation
Adds client-side validation to forms
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

× Webform Views
  Integrates Webform 8.x–5.x and Views modules
  https://www.drupal.org/project/webform_views

× Webform Analysis
  Used to obtain statistics on the results of form submissions
  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)

× **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)

× **Maillog / Mail Developer**
  A utility to log all Mails for debugging purposes
  [https://www.drupal.org/project/maillog](https://www.drupal.org/project/maillog)
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.
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

× Drupal Answers
  http://drupal.stackexchange.com

× Webform Issue Queue
  https://www.drupal.org/project/issues/webform?version=8.x
THE DRUPAL COMMUNITY

- Drupal Association (Membership)
  https://www.drupal.org/association

- Drupal Planet (Blogs)
  https://www.drupal.org/planet

- Drupal Newsletter (Email)
  https://www.drupal.org/association/newsletter
ARE WE DONE YET?
Ralph says... YES!!! ANY QUESTIONS?