

Webform Creation & Management

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Chapter 1. Introduction

This guide will teach you how to create a webform using CiviCRM and Drupal through [the Rabbinical Assembly's website](#).

If you have any questions that are not addressed in this guide, please reach out to [Christine Aucoin](#).

Chapter 2. How To Create A Webform Page

1. On [the Rabbinical Assembly's homepage](#), navigate to the black bar at the top of the screen.
2. From the **Manage** menu, click **Content**.
3. Click **Add Content**.
4. Click **Webform**.



CAUTION:

Despite the name of the element you're creating, this is NOT how you create the actual webform! In this step, you are creating the page that will *contain* your webform. You can learn how to create a webform [here \(on page 6\)](#).

5. Fill in the **Title** and **Body** fields.
6. From the **Webform Public Menu** and **Webform Member Menu**, select where you would like your webform to be categorized on the RA website. If your webform is not meant for public viewing, do not select anything from the **Webform Public Menu**.
7. Make sure that the **Published** checkbox is selected. This should already be selected when you create a new page.
8. Click **Save**.

How To Manage Your Webform Page's Permissions

After your webform page is published, you can manage who has permission to view that page. The permission levels that you will encounter are:

- **RA Admin:** A member of the RA staff.
- **RA Member:** A member in good standing of the Rabbinical Assembly.
- **Anonymous User:** A generic category for anyone who is not logged into the RA website.

RA Admins should have permission to view all webforms our staff creates. **RA Members** should have permission to view all webforms our staff creates *except* any webforms for events that have not been launched yet. **Anonymous Users** should only have permission to view webforms connected to *public events*.

How To Set Permissions

1. On your posted webform page, navigate to the **Grants** tab.
2. From the **View** column, check off the users you want to give viewing permission.
3. At the bottom of the page, click **Save Grants**.



Important:

For all webform pages, the only users who should be checked off in the **Grant** tab's **Edit** and **Delete** columns are **RA Admins**. No other category of user should be able to edit or delete a webform page.

Grants

View Edit **Grants** Delete Manage display Clone Devel

You can set grants for individual users. Enter a name or a partial name in the box and click Search or press return. You must check the 'Keep?' checkbox if you want to keep the user for granting. Note that user grants are in addition to those coming from roles.

Role	View	Edit	Delete
authenticated user	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suspended-VHK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
manage users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
anonymous user	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RA Member	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cart User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CIVI Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How To Promote Your Content

By default, your webform page will not be promoted to the front page of the RA website. You can change your webform page's settings to make sure that it appears on the homepage.

1. Navigate to the **Edit** tab of your webform page.
2. In the **Promotion Options** field, select **Promoted To Front Page**.
 - a. If you want your webform page to remain at the top of the RA homepage, also select **Sticky At Top of Lists**. This will stick your webform page to the top of the homepage until this field is unchecked. Otherwise, newer posts will force your webform page down.
3. Click **Save**.

Chapter 3. How To Create A Webform

After your webform page is created, you must create the actual webform that you will use to collect data from your users.

1. On [the Rabbinical Assembly homepage](#), navigate to the black bar at the very top of the screen.
2. Select **Shortcuts**, then select **Webform**.
3. Click **Add Webform**.
4. Populate the **Title** and **Administrative Description** fields with your webform's information.
 - a. The **Administrative Description** will only be visible to other **RA Admins**. It can be a full description of your webform, or a shorter summary to communicate essential information to other staff members.
5. Under **Status**, click **Open**.
6. Click **Save**. This will automatically bring you to the **Build** tab of your new webform.
7. Click **Add Element**.
8. Add your webform's questions (see [Customization Options \(on page 7\)](#) for more information).
9. Click **Save Elements**.
10. To view how your webform will appear to users, navigate to the **View** tab of your webform.

Figure 1. A Screenshot of the Webform Build Tab

test webform

View Test Results **Build** Settings Export Devel

Elements Source

+ Add element + Add page + Add layout

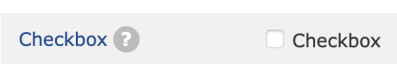
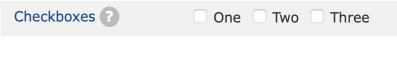

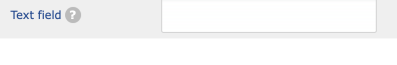
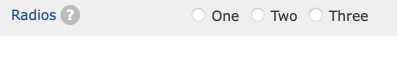
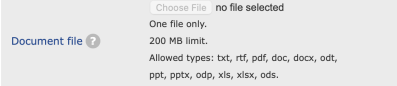
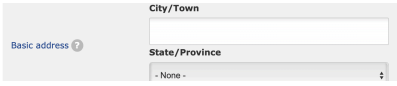
The **Elements** page allows users to add, update, duplicate and delete elements and wizard pages. [▶ Watch video](#) Show row weights

Title	Key	Type	Required	Weight	Parent	Operations
Please add elements to this webform.						
▶ Entity draft						

Save elements Reset

Customization Options

Drupal allows for a lot of webform customization. Below are some of the most common webform elements used by the RA office.

Element Image	Element Name	Description
	Checkbox	Provides a single checkbox option. Useful for collecting agreement to mandatory terms of service or other policies.
	Checkboxes	Provides multiple checkbox options. Users can select as many checkboxes as they want.
	TextArea	Provides a large textbox. Useful for short-answer questions.
	TextField	Provides a small textbox. Useful for questions that only need a single-word or single-line response.
	Radios	Provides multiple radio buttons. Users can only select one option.
	Document File	Allows users to upload a text file. Useful for webforms that ask users to provide supplementary material, like committee applications.
	Basic Address	Quick-fills multiple address fields at once. An easier option than manually creating many TextField elements if you are asking for a user's address.

Chapter 4. How To Link Your Webform To Your Webform Page

After your webform page and webform are both created, the next step is to link the two together.

1. Navigate to the **Edit** tab of your webform page.
2. Navigate to the **Webform** dropdown menu directly under the **Body** field.
3. Select your webform from the **Webform** dropdown menu.
4. From the **Webform Settings** collapsible menu, make sure that **Status** is set to **Open**.
5. Click **Save**.
6. Navigate to the **View** tab of your webform page. Your webform should now appear at the bottom of the page.

Chapter 5. Managing Your Webform's Data

This section will teach you how to view, export, and understand your webform's collected data.

How To View Webform Submission Results

There are two primary ways to view your webform's submission results. The first is navigating to your results through your webform page.

1. On your webform page, hover your mouse over the first question in your webform. A **pencil icon** will appear.
2. Click on the **pencil icon**, then click **Results**.
3. View your webform's results.

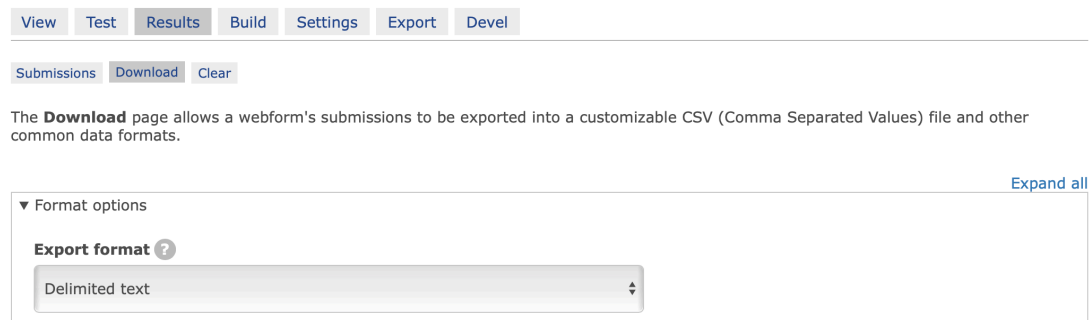
The second way to view your webform's results is navigating to your results directly through your webform.

1. Starting on the [RA homepage](#), navigate to the black bar at the top of the screen.
2. Select **Shortcuts**, then select **Webform**.
3. Use the searchbar at the top of the page to search for the name of your webform.
4. Click on your webform's name.
5. Navigate to the **Results** tab.
6. View your webform's results.

How To Export Webform Submission Results

1. Navigate to the **Results** tab of your webform. (For more information, view [How To View Webform Submission Results \(on page 9\)](#)).
2. When viewing the **Results** tab, you will be taken by default to the **Submissions** sub-tab. Navigate instead to the **Download** sub-tab.
3. Select the format you want your data to be downloaded in from the **Export Format** dropdown menu.
4. Scroll to the bottom of the page and click **Download**.

Figure 2. **A Screenshot of the Webform Results Sub-Tabs**



How To Update Webform Status

Some time-sensitive webforms, such as committee applications or programs occurring on a single day, are only open for a set amount of time. It's important to close your webform as soon as you are no longer accepting submissions.

1. Navigate to the **Edit** tab of your webform page.
2. Under the **Webform Settings** collapsible menu, set **Status** to **Closed**.
3. Click **Save**.